OWL Portal Guide

OWL is a SaaS application, developed by Onwave to aid Customers with the dissemination and communication of hazard and work site information to remote workers.

OWL Version
1.7.2

April
2022

0203 434 2100 | support@owl-bi.com | owl-bi.com

Contents

1 Introduction

This manual includes instructions, guidelines and demonstrations for the operation and management of the OWL portal.

The OWL portal is used in conjunction with the OWL Tags and OWL Mobile App which are covered in detail in the following user guides:

- Name of OWL Tag Guide.
- Name of OWL App Guide

This document is maintained and updated as new features are added to the OWL portal and as such users of the portal should always refer to a current version of this document which is maintained online at XXX

2 Getting Started

2.1 Logging in

2.1.1 Logging into your account

New users will automatically receive an initial password which will be issued via a system generated email when their account is created within the system by an Administrator.

This email will originate from owl@onwave.com and will contain a temporary password as well as links to the OWL portal. Users are advised to check in their spam/ junk and with any company system administrators where emails are not being received.

Sent:owl@onwave.com
Subject: Set up your OWL account

Hello,

Welcome to OWL!
Please follow the link to log into your new OWL Company Admin account:

URL: www.owl.com
*Password: ***********

For help please contact the support team.

Kind regards,
OWL Support Team

OWL SUPPORT

Tel: 0203 434 5002

Email: support@owl-bi.com

www.owl-bi.com

Figure 1: OWL desktop portal login screen.

To access the OWL platform from an approved browser, you need to enter the OWL URL- https://portal.owl-bi.com/

Approved Browsers:

Google Chrome **Firefox** **Safari**

Figure 2: OWL desktop portal login screen.

Once at the login screen, you should enter your email and password into the fields indicated and click the *Log in* button (Figure 3). Username and password are case sensitive.

> **Note:** Users should never share login credentials to the application with others.

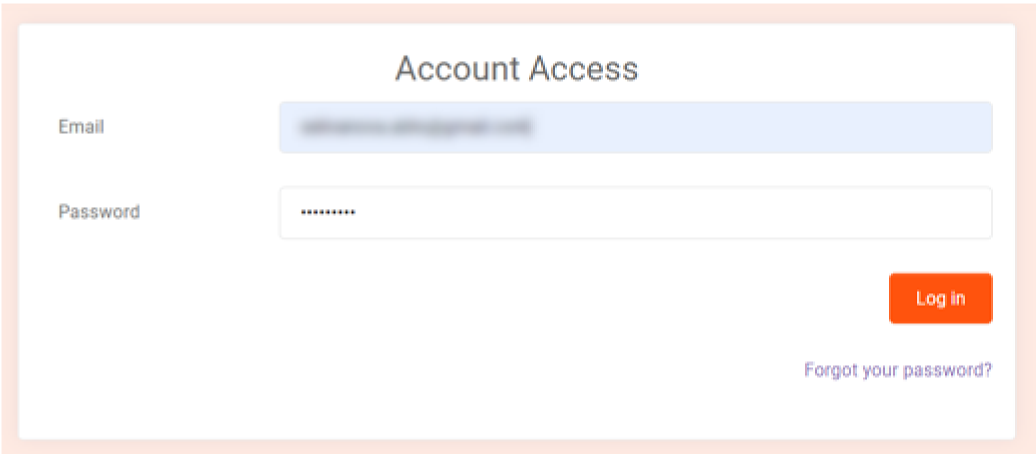


Figure 3: OWL desktop portal login screen.

Assuming you have provided the correct login credentials, a popup will appear asking you to accept the OWL End User License Agreement (Figure 4: Terms and Conditions acceptance popup.)

The Terms and Conditions of the Agreement can be accessed by clicking on the hyperlink. This will open the full OWL End User License Agreement within a separate page in your browser (Figure 5).

> **Note:** The Terms and Conditions must be accepted in order to access the platform. The prompt will appear each time you log onto the platform.

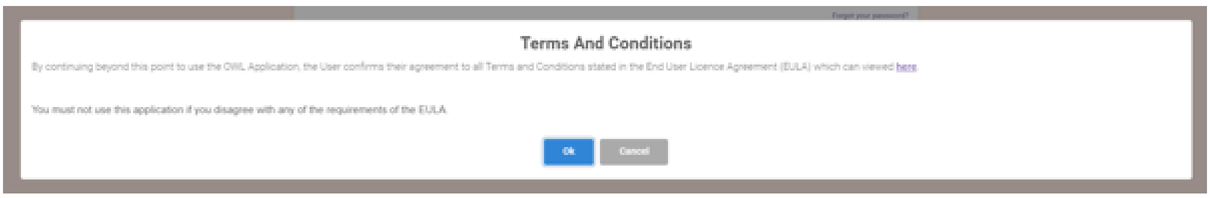
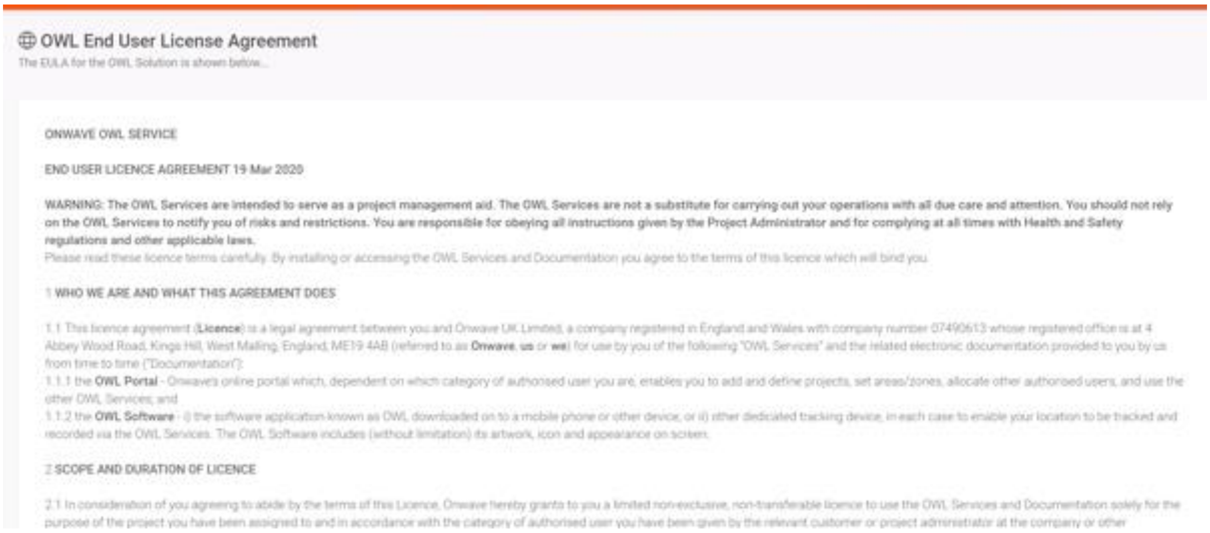


Figure 4: Terms and Conditions acceptance popup.



OWL End User License Agreement

The EULA for the OWL Solution is shown below...

ONWAVE OWL SERVICE

END USER LICENCE AGREEMENT 19 Mar 2020

WARNING: The OWL Services are intended to serve as a project management aid. The OWL Services are not a substitute for carrying out your operations with all due care and attention. You should not rely on the OWL Services to notify you of risks and restrictions. You are responsible for obeying all instructions given by the Project Administrator and for complying at all times with Health and Safety regulations and other applicable laws.

Please read these licence terms carefully. By installing or accessing the OWL Services and Documentation you agree to the terms of this licence which will bind you.

1 WHO WE ARE AND WHAT THIS AGREEMENT DOES

1.1 This licence agreement (**Licence**) is a legal agreement between you and Onwave UK Limited, a company registered in England and Wales with company number 07490613 whose registered office is at 4 Abbey Wood Road, Kings Hill, West Malling, England, ME19 4AB (referred to as **Onwave**, **us** or **we**) for use by you of the following "OWL Services" and the related electronic documentation provided to you by us from time to time ("Documentation"):

1.1.1 the **OWL Portal** - Onwave's online portal which, dependent on which category of authorised user you are, enables you to add and define projects, set areas/zones, allocate other authorised users, and use the other OWL Services; and

1.1.2 the **OWL Software** - i) the software application known as OWL downloaded on to a mobile phone or other device, or ii) other dedicated tracking device, in each case to enable your location to be tracked and recorded via the OWL Services. The OWL Software includes (without limitation) its artwork, icon and appearance on screen.

2 SCOPE AND DURATION OF LICENCE

2.1 In consideration of you agreeing to abide by the terms of this Licence, Onwave hereby grants to you a limited non-exclusive, non-transferable licence to use the OWL Services and Documentation solely for the purpose of the project you have been assigned to and in accordance with the category of authorised user you have been given by the relevant customer or project administrator at the company or other

Figure 5: End User License Agreement page.

2.1.2 Logging Out

To Log out of the portal, use the User Icon on the top right of the screen, this will give you several options, the final one of these is the option to logout. Simply click on the link and you will be logged out of the platform.

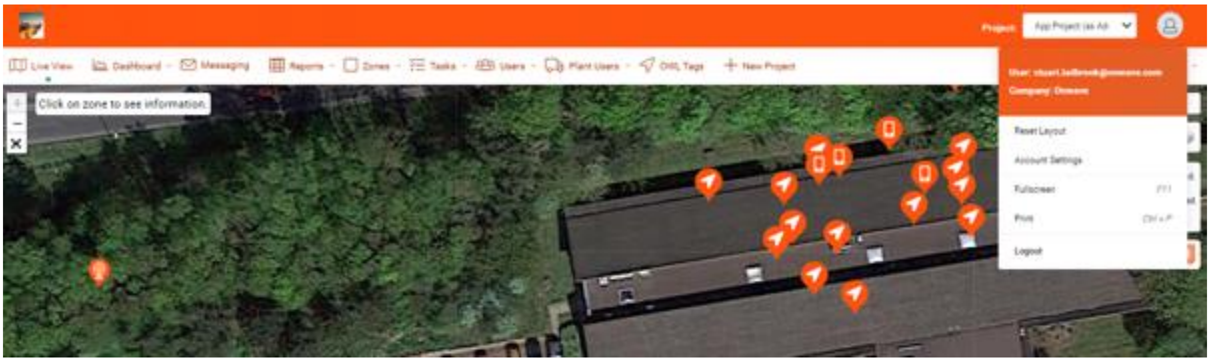


Figure 6: Logout Selection

2.2 Passwords

2.2.1 Creating user accounts

Only users with the relevant Company or Project Admin privileges can create User Accounts (See Section 3.2.5).

The initial Company Admin account will be created by OWL team.

Once a User account is created the OWL platform will automatically generate an email to the email address of the user.

2.2.2 Changing your password

Click on the User icon and select Account Settings.

You will be prompted to enter your current password, your new password, and a confirmation of the new password (Figure 7). Once done, click *Update password*.

Now return to the login page (Figure 3) and use your new password.

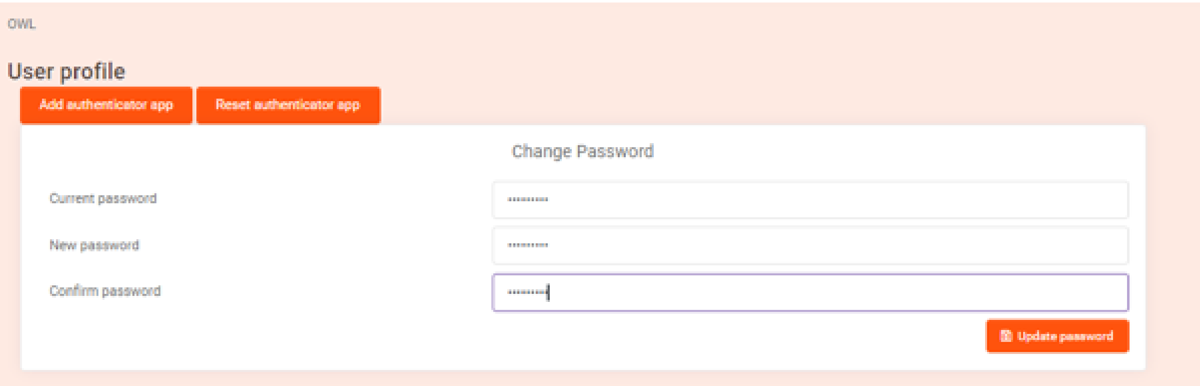


Figure 7: Changing a known password.

2.2.3 Resetting a forgotten password

If you cannot remember your password, you will need to reset it.

Go to the OWL login page (Figure 3).and select Login, then use the *Forgot your password?* Link. This will open a new window which will allow you to enter your account email to get a password reset. (Figure 8). Once you have entered you're the email address associated with your OWL account click *Submit*.

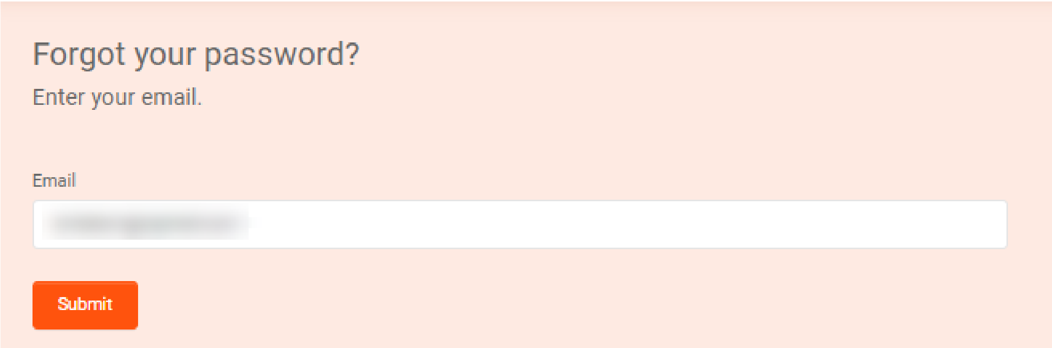


Figure 8: Email request to send link to reset forgotten password.

You should receive an email from owl@onwave.com with a link to reset your password.

Note: it is advised that junk and spam mailboxes are monitored to ensure you can receive emails from the OWL platform, these will come from owl@onwave.com.

The email content will be as follows:

Sent: owl@onwave.com
Subject: Password reset for OWL

Hello,

To reset your forgotten password please follow the link below and follow the instructions.
XXX

For help please contact the support team.

Kind regards,
OWL Support Team

OWL SUPPORT

Tel: 0203 434 5002

Email: support@owl-bi.com

www.onwave.com/owl

Figure 9: Email for resetting forgotten password.

The link in the email will open a new webpage (Figure 10).

Enter your email address and new password, then confirm the new password. Click *Submit* and your password will be reset.

> **Note:** For help with logging in see section 2.1.

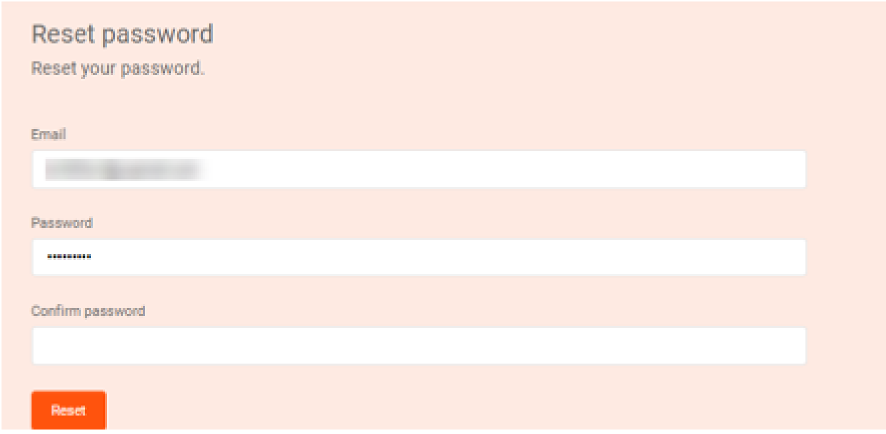


Figure 10: Reset password email link page.

2.2.4 Two-factor authentication

To set up two-factor authentication for your own account, click the User icon in the top-right of the screen and then select *Account settings.*

Click the *Add authenticator app* button and you will be directed to a screen with a QR code (Figure 11).

Follow the instructions on the screen and then press *Verify.*

Figure 11: Two-factor authentication set-up page.

2.3 Navigation

2.3.1 Home Page

When the OWL portal starts you will be presented with a limited navigation menu. The OWL logo on the top left of every page returns you to the home page.

2.3.2 Selecting your Project

To initiate OWL you will need to select your Project. This is done by selecting the project within the Project dropdown menu.

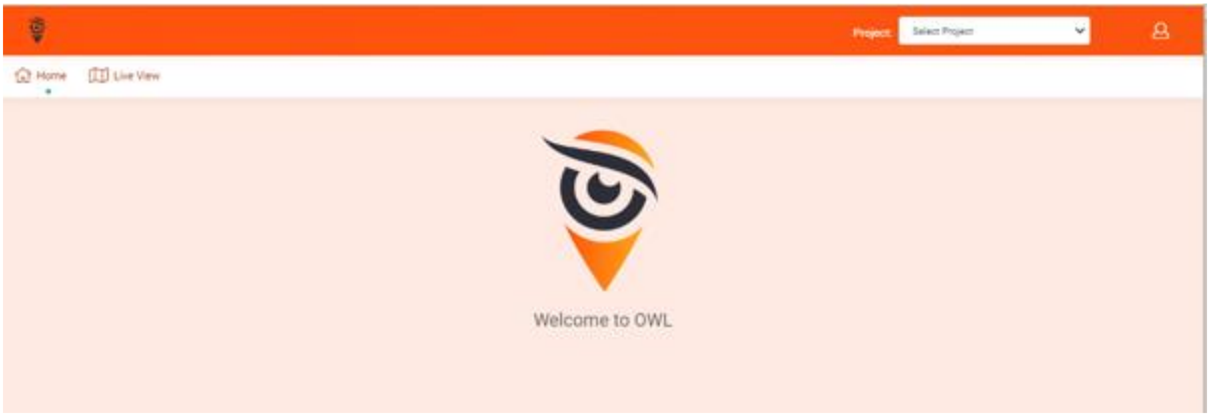


Figure 12 - OWL Home Page

2.3.3 Navigating within a Project

Once a project is selected, the navigation bar on the Home page will open providing you access to a selection of menu options. The options that appear will vary dependent upon your level of permissions, but may include:

- Project* only visible to Company users
- Live View
- Dashboard
- Messaging
- Reports
- Zones
- Tasks
- Users
- OWL Tags
- New Project
- Settings

Further dropdown menus exist with the main menu items. The functions within each of these main menu items are explained in the corresponding sections of this guide

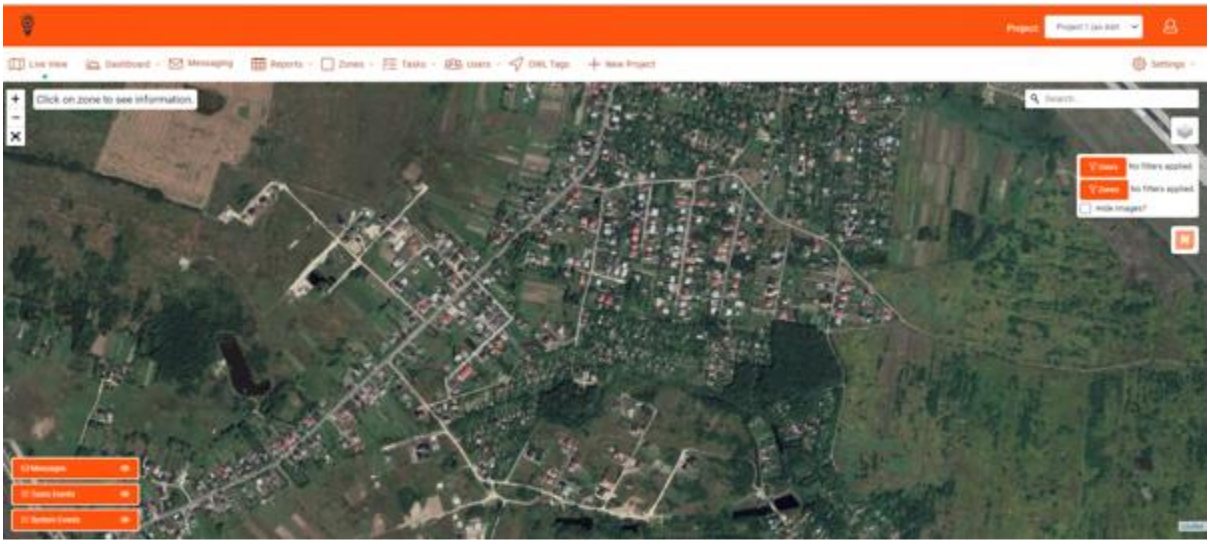


Figure 13: Home page.

2.3.4 User account settings

The User icon on the far right of the page above the navigation bar allows you to access:

- Reset Layout (allows you to set and removes preferences in the Layout of your Portal)
- Account Settings (where you can access password settings and enable/disable 2 Factor Authentication see 2.2.4)
- Full Screen (sets your OWL portal to full screen width, removed by pressing escape)
- Print (provided you with standard print function)
- Logout

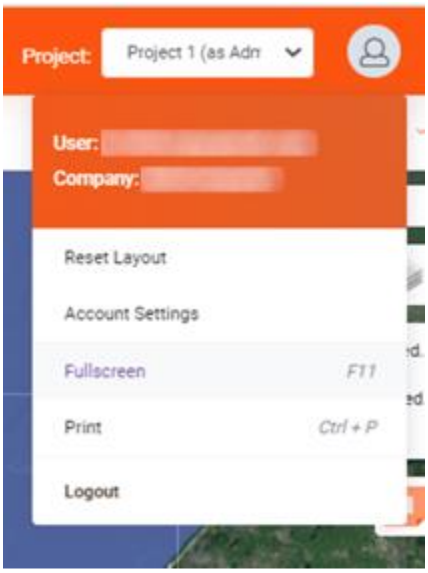


Figure 14: User Settings

> **Note:** You should always log out of your account when you are not using the OWL portal to ensure data security.

3 Setting up your project

3.1 Projects

3.1.1 Intro to Projects

On creation of your OWL account your chosen Company Administrator will be given access to your Customer environment.

Projects are containers that allow you to divide this environment into manageable data sets. Projects are administered by Company users with the necessary permissions. Projects can be created by the Customer to limit access to Company level information.

At a Company level data can also be collected into Project Groups to aid visibility across Projects. This allows Company Users with Project Group privileges to report and view information across multiple Projects from within the same window.

3.1.2 Project Creation

Where a Company User has the appropriate privileges, they are able to create a Project. (Company Level Permissions). To create a Project you need to navigate to the Projects Tab on the main navigation bar.

INSERT IMAGE XXX

Figure 15: Project Creation Page.

Once you have opened the Projects view you will have the option to create (Add New) Projects. To create a project, you will need to give it a name and to allocate licenses to the project. You are also given standard option to number your project.

From the Project Menu you are also able to create Custom Fields (variable attributes) that allow you to manage your projects more easily. You may for example want to include Division Codes, Regions etc.

3.1.3 Project Deletion

NOTE -IF YOU DELETE A PROJECT YOU WILL LOSE ALL DATA AND INFORMATION RELATED TO THIS PROJECT, SO PLEASE EXERCISE CAUTION.

Where a Company User has the appropriate privileges, they can delete a Project(s).

To delete a Project you need to navigate to the Projects Tab on the main navigation bar.

Once you have opened the Projects view you will have the option to Delete and or Archive Projects.

To delete a project, you need to select the correct project within the table and to click on the Project Menu and select the delete button within on the corresponding line.

If you need to retain any data related to the project simply Archive the project, this way the project will remain available for you to reopen and review.

3.1.4 Project Archive

To Archive a given Project, you need to navigate to the Projects Tab on the main navigation bar.

Once you have opened the Projects view you will have the option to Archive the Project

When you archive a project any remaining license credits that remain on that project will be returned to your Company account so that these can be reallocated to other projects, (this will happen at 01:00 on the date following this archiving). Once archived, you will have the option to reopen/ reactivate the project you will need to assign licenses to the project should you wish.

3.1.5 Editing Project details

To edit the details for a given Project, you need to navigate to the Projects Tab on the main navigation bar.

Once you have opened the Projects view you will have the option to Edit the Project, this will open the project details page, that was used for creation of the project.

You will then be able to change any of the entries that have been made in relation to the project details (project name, project number, your icon for the project, custom fields etc)

3.1.6 Project Selection

Once logged in, the User can select the required Project from the Project dropdown menu, found in the top right corner of the navigation bar (Figure 16). This will immediately take the user to the correct Project Environment. Users will only be able to see Projects where they are a defined user.

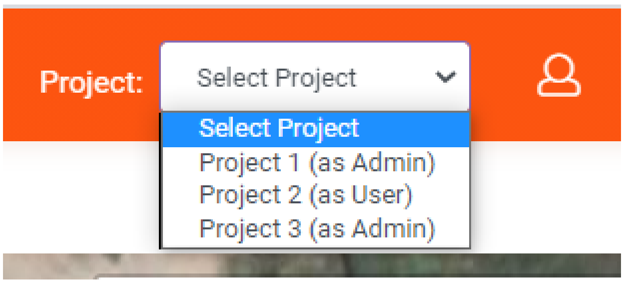


Figure 16: Project selector dropdown.

3.2 Users

3.2.1 Intro to Users

Any individual that uses the OWL Platform, whether through the Mobile App or OWL Tags, is referred to as a User. User accounts are created by other Users with the relevant administrative privileges within either the Company or the Project. These admin privileges are hierarchical in nature.

Users can be assigned to one or more Projects within the OWL application from the same account and can navigate freely from one project to another. From a licensing perspective, credits are consumed by the users home or primary project while there account is in an active state, the system will not function if the user account is made inactive.

Users will have different levels of access to the Platform depending what permissions they are given. Users with administrative powers are generally referred to as Admins.

Admins can create new User accounts by hovering over the *Users* button and selecting *Add new* (**Error! Reference source not found.**).

3.2.2 Permissions

Company Admins have the highest level of access permission, they can create additional Company User accounts with different Permissions, they can also create and administer Project account permissions:

- See Location data?
- Modify Existing Projects?
- Create New Projects?

According to the applied permissions, Project Users can be given admin level permissions so that they can access and manage different types of data.

If *See Location Data?* permission is enabled, only the following modules will be available:

- Live View
- Reports (System Reports, System Events, Task Events, Location Player)
- Dashboards

The User is able to view all modules, but cannot modify existing Projects.

Project Admin is not able to create new Projects.

If the *Modify Existing Projects?* Permission is enabled for the Project Admin:

Project Admin is able to modify existing Projects and can view, edit and create items in all modules (including Zones, Users, Tasks, OWL Tags, Plant).

Project Admin will not have access to location data (Live View, Reports, Dashboards).

Project Admin cannot create new Projects.

If only the *Create New Project?* Permission is enabled for the Project Admin:

Project Admin is able to create new Projects.

Project Admin will not have access to location data.

Project Admin is not able to modify existing Projects. The Project Admin is able to view all modules at the Project level but cannot create, edit, or delete any information.

Note: In section XXX we will specify how Project Admins can interact with modules when all Permissions are applied.

3.2.3 Setting up an Admin account

The Company Admin can create the Project Admin User. Project Admin accounts can also be created by another Project Admin within the same Project.

Note: The initial **Company Admin** account can only be set up by Onwave. Company Admins can then create additional Company Users within the Company.

Once the Company Admin has set up the Project User account, the password will be sent directly to the User's email address. (see section 2.2.1)

3.2.4 Viewing Users

The User page displays all Users currently assigned to a particular Company or Project, it shows the following information:

- Username
- Email
- Type – the role of the member inside the project, e.g. Project Admin
- Groups
- Actions

> **Note:** The email provided will be the username for the User's account.

The table has search fields on each column that can be used as filters.

The Username and Email fields can be edited on the table via the *Edit* button (Figure 17).

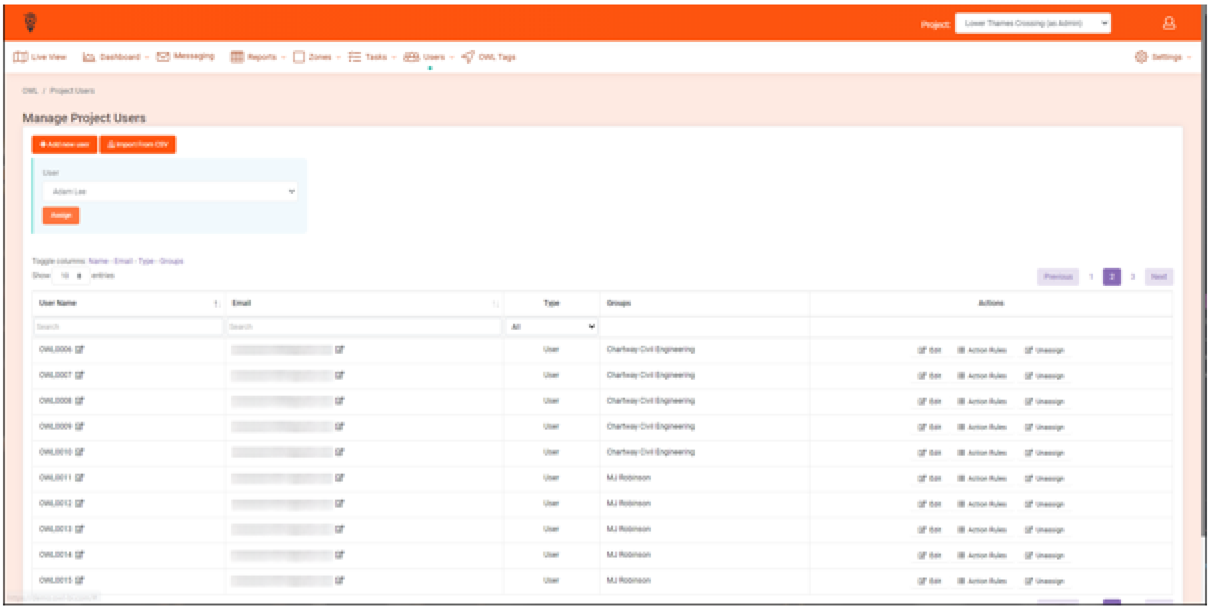


Figure 17: User List View.

3.2.5 Departments

Departments are used to manage the visibility of user data throughout the OWL platform. Departments make it possible to define which information related to other users of the system can be seen by individual users. Project Users may be assigned to a Department, or many Departments, as defined by their job role and responsibilities.

To create a new Department, navigate to the Departments page under the *Users* menu on navigation bar. Click on the *Add* button above the table, a pop up will appear, enter the name of the Department and confirm by clicking *OK.*

To assign Project Users to Departments, locate the Department you have created in the Departments page and click the *Edit* button in the Actions column. This will direct you to an *Edit Department* page; select the Users you wish to be members of the Department from the dropdown, and click *Save* to add the Users to the Department.

When you create new users (see Section XXX) you can define their ability to see user data based on these Departments. New Departments can be created at any time.

3.2.6 User Custom Fields

User Custom fields allow you to collect data specific to your project that will support the management of your teams and project activities, this may include competencies, expiry dates of certifications or simply mobile contact numbers. User Custom fields can be added at any point within your project.

To access User Custom Fields, select *Custom Fields under the User Menu on the Main Navigation Bar* (see XXX).

To create a new User Custom field, click *Add new*, then enter the new Custom Field's title and the type of Custom Field that you want to create (**Error! Reference source not found.**).

Custom Fields can have be in any of the following formats:

- Text
- Number
- Email
- Date
- True/False (Boolean)
- File

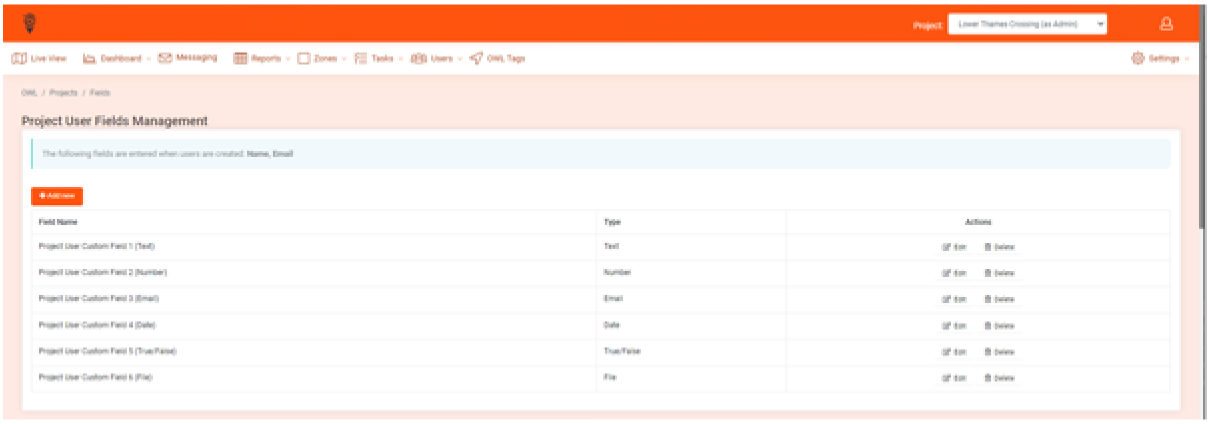


Figure 18: Custom Field Management.

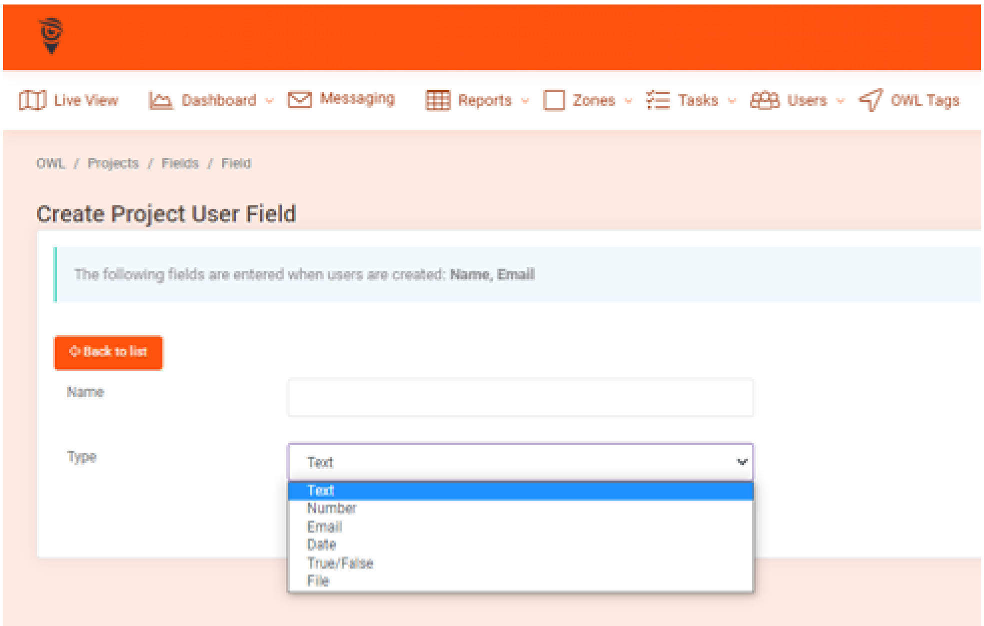


Figure 19: Adding a new Custom Field form.

Each custom field you have created will automatically appear in the User Page so that it can be populated as you Add New Users or Edit existing user records.

3.2.7 User Groups

User Groups are used to put your Users into different groups that can be used within the policies within OWL. Users can belong to more than one group, so groups can be used for multiple purposes for example, you may create groups for different suppliers, or to group certain skills or competences.

Access the User Groups options via the dropdown list under Users within the main navigation.

When you open the User Groups page you will see a list of any User Groups that you have created. To create a new user group, enter the new Group name, and then select the Group colour in the *Map Marker Colour* field, this will be added to your list of Groups. To edit or delete the user Group simply select the option within the actions column.

To add a User to a User Group, locate their User page (see 3.2.8). You will see an option for both Groups and *Primary Group*, where you can select a User's primary User Group.

User Groups can also be assigned when creating a new User; the *Groups* and *Primary Groups* column can be found beneath the *User Permissions* section on the Create Company User page. Lastly, if you enable the checkbox *Use Primary Group Marker Colour?*, the colour of the group will be used for the User icon on the Live view page.

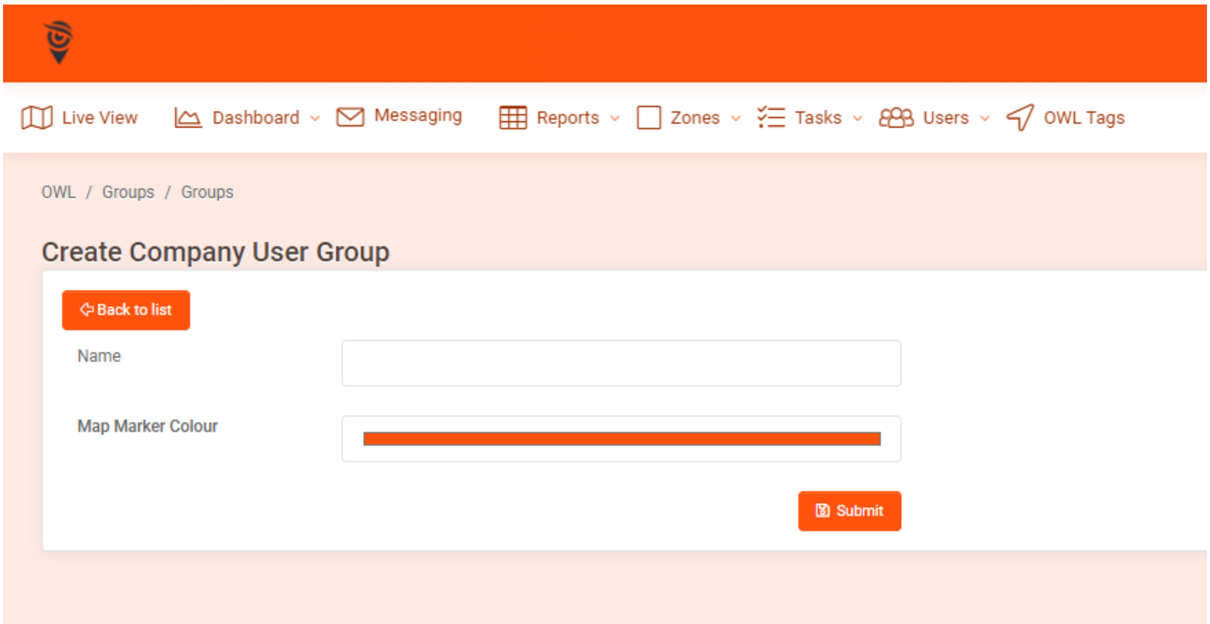


Figure 20: Creation of a User Group.

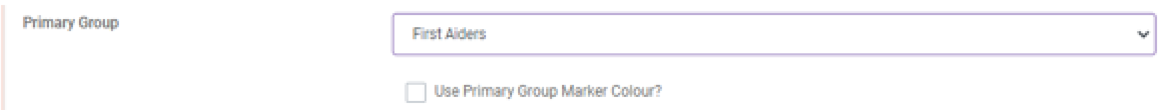


Figure 21: Assigning a User to a Group.

3.2.8 Adding a User

On the User page click the Add new User button at the top of the table. This will take you directly to the Individual User Page

Input the User's name and email address in the fields indicated.

Enabling the *Is Active?* checkbox initiates and disables the User account and allows the new User to access the Web Portal and Mobile App.

Enabling the *Is Admin?* checkbox automatically assigns full Admin rights to the created User.

If the *Is Admin?* option is deselected, two sections will be made available:

- Resource Permissions, and
- User Permissions.

3.2.8.1 Resource Permissions

The following Resource modules are displayed in the Resource Permissions window, for certain Users, limited options will be available for selection:

- Projects
- Users

- Zones
- Tasks
- Image Overlay
- OWL Tags
- Location Data (this option enables the following features for Users: Live View, Dashboards, System Reports, System Events, Task Events, and Location Player)
- Licensing
- API

Against each of the above functions you can allocate any of the following Resource Permissions: *View, Create, Edit* and *Delete.*

By default a *View* Permission is provided, this can be removed if needed. Resource Permissions options are as follows:

- None: if selected, the chosen Resource module will not be displayed for the Project User at all.
- View: if selected, the chosen Resource module will be made available to the User to view on the Platform, as well as any data related to the selected Resource. Unless otherwise stated, Users will only be able to view modules with this Permission and cannot create, edit or delete any data within the module..
- Create: if selected, the User will be able to view and create data within their permitted modules. Unless specified in Resource Permissions, the User will not be able to edit or delete any data related to the module.
- Edit: if selected, the User will be authorised to view and edit existing data within the selected modules. Unless the specific Permissions are applied, Users with this Permission are not able to create or delete within Resource modules.
- Delete: if selected, Users can view and delete any existing data relating to their permitted Resource modules. Unless specified, Users with this Permission cannot create or edit data within modules.

NOTE - If the *Edit, Create* or *Delete* Permissions are selected for a Resource, the *View* Permission will be applied automatically)

Messaging and Layout Settings modules will always be made available for Users, even if all Resource Permissions are disabled on that User's account.

3.2.8.2 User Permissions

User permissions is where the visibility of user identifiable data is managed within OWL, User permissions are linked with Departments within OWL, as this is where location data visibility and access is managed.

This functionality differs from resource permissions which control access to modules and functions within modules e.g., creating zones, viewing zones, managing licensing etc.

User permissions allows you to create and customise the visibility of user data within your Project.

The focus within User Permissions is to define what other user data is being made available to the user account being created.

User permissions granted can include:

- *Has Admin Access to all Users?* – this allows the user to see and manage the User permissions of all other users

  If this option is selected, the User will be able to view the list of all Users assigned to their Project via the Manage Project User page. This option will also give the User the ability to create and edit all User accounts assigned to the Project, as well as the ability to assign or unassign Project Users to said Project (in the case that the *Create, Edit* and *Delete* Permissions are assigned to the User in the Resource Permissions window).

- *Has View Access to all Users? – this allows the user to see the User data of all other users (location, custom fields etc)*

  If this option is selected, the User will be able to view the data of other Users in the following OWL features:

  - Live View
  - Dashboard
  - System Reports
  - System Events
  - Task Events
  - Location Player
  - Zones
  - Tasks
  - Batch Action Rules

  > **Note:** This option does NOT allow for Users to access Project User information in the Manage User page.

- *Has View Access to all Users* ?– this allows the user to be set with specific permissions for other users within individual Departments.

  In the event that specific Users need the *View Access* and *Admins Access* Permissions enabled, they can be selected by Department in the User Permissions window. If these Permissions need to be given to Users who are not assigned to the relevant Departments, they can be selected in the *Other* field.

3.2.8.3 User Group

You may want to assign the User to a User Group. If the Group is already created this will appear when you click in the Selection Box. If the required Group has not been created no Groups will be displayed. To create a new Group press the 'plus' button to create a new Group, you will be prompted for a new group name. For more information about User Groups, refer to section XXX.

> **Note:** A User can be a member of more than one Group; if needed a main 'Primary Group' can also be assigned.

3.2.8.4 Appearance in Live View

The appearance of a User marker can be configured, your Project may elect to create a policy in regard to the User having an appropriate colour and icon combination. Marker icons may be selected from the Default icons, or custom icons can be uploaded as needed, by scrolling to the bottom of the list and adding an icon.

Once finished, click *Submit* and the User will be sent an email with their login credentials.

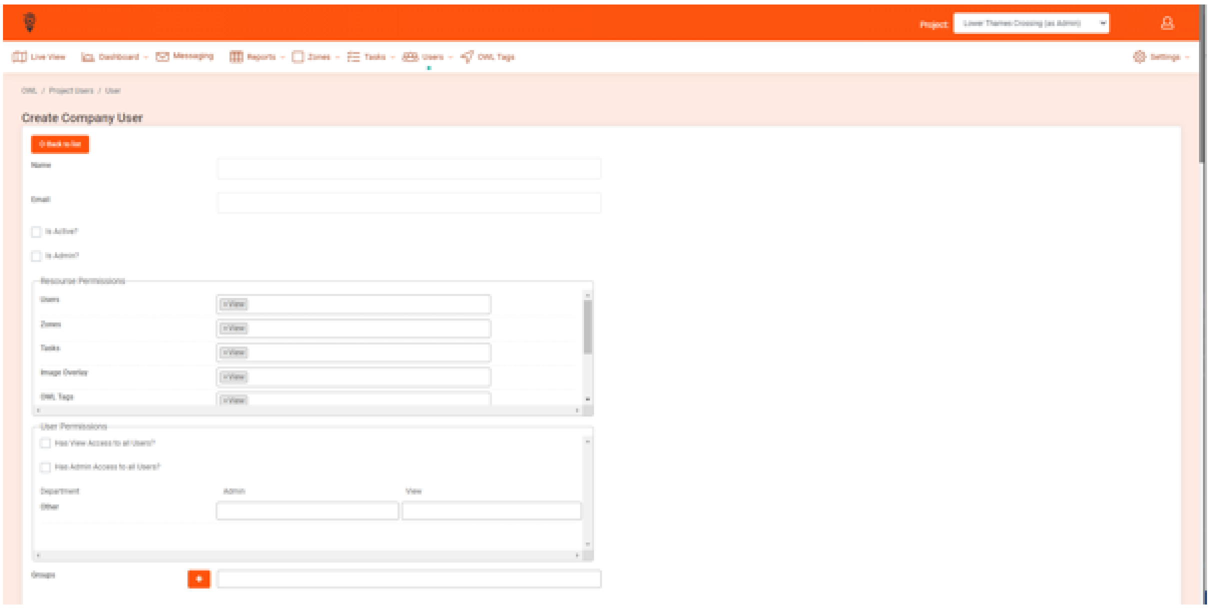


Figure 22: Create Company User page.

3.2.9 Adding multiple Users

Click the *Import from CSV* button on the User List View page

The popup will appear to allow you to set the separator/delimiter on your CSV. You can select the separator you would like (default value is semi colon), once selected you can click on the hyperlinks to download a template file or an example file which will allow you to see the format you need to input all User information and complete their profiles.

Once you have created your import file in CSV format, you can simply Choose this file to import your users.

> **Note:** The template allows you to add information based on any custom fields that have been added to the platform. For more information about custom fields see section XXX.

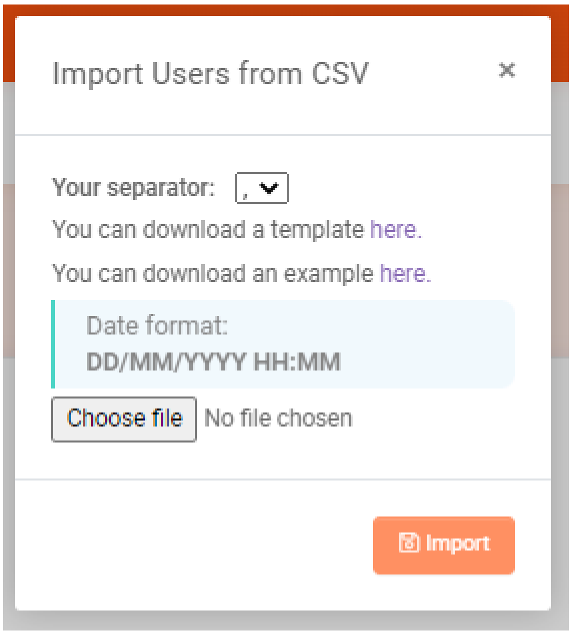


Figure 23: Import from CSV button popup.

NOTE- Permissions, Groups and Departments are not managed through the import function, these will need to be reviewed once your users and imported.

3.2.10 Setting a User to Inactive

To disable a User account within your project navigate to the User List select the User and click on the Edit function within the Actions Column. You can search for your User by email or username to help you locate them. Once in the User page you simply deactivate the User by unticking the Is Active? Check box.

When the Is Active? Box is unchecked the User Access to the project will be removed, however all other information in respect to the user will be retained. When the User account is in an inactive state no license credits will be taken related to the User within the project.

We would recommend using this function rather than fully deleting a User if there is a need to retain data or limit access from time to time.

3.2.11 Remove a User

On the User List View page, click *Unassign* at the end of the appropriate User's row to remove the User from your Project.

NOTE for Project Admins this field will not be available and Project Admins can only be removed by a User with Company Admin permissions.

To confirm a User has been successfully removed a popup will appear (see Figure 24: Popup for successful deletion of a User.Figure 24); click *OK* to close this window.

Note: Note that Project Admins are only able to unassign Project Users, not other Project Admins.

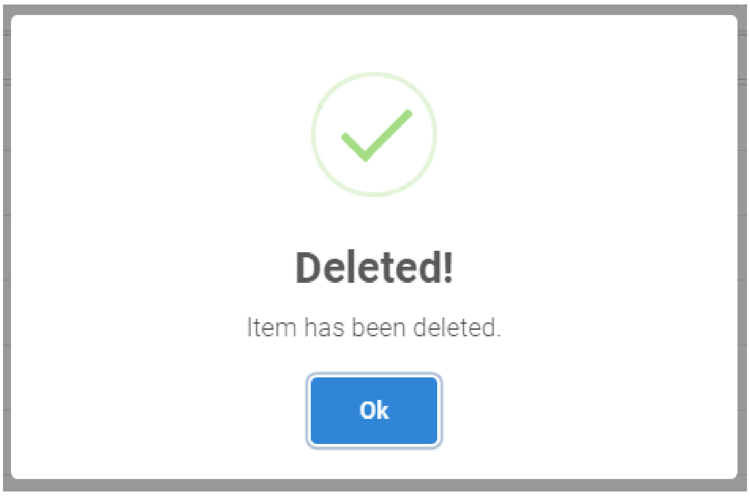


Figure 24: Popup for successful deletion of a User.

3.2.12 User Privacy functions

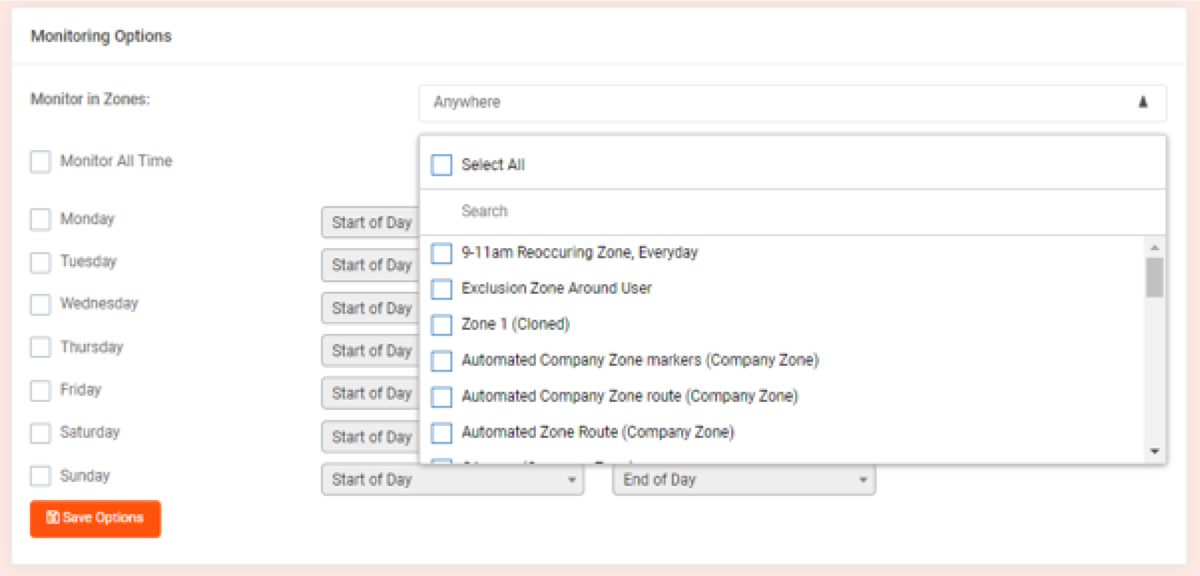
To assign privacy function for a User, navigate to the appropriate User within the User List View page and select *Action Rules* in the Actions column.

This will take you to the User Action Rules page for the individual you have selected, here you have 2 functions:

- Tracking Options (Privacy) and
- User Action Rules (Lone Worker Functionality)

Tracking Options allows you to define a privacy policy that relates to this user in respect of your project. The privacy controls fall into two categories, location based policy and time based policy, both policies can be applied if needed:

- Location policy, by selecting the Tracking in Zones option, you can define where the system will collect location data from the User (App or Tag). This is configured by selecting the specific Zone(s) from the *Monitoring in Zones* dropdown menu. The list of zones displayed will be taken from any Zones that have been created within the project. We would recommend the creation use of a simple zone defined as Project Limits for most Projects although it is possible to setup several zones as needed. (**Error! Reference source not found.**).



- *Figure 25: Tracking in Zones.*

- Time of day policy, here you can define tracking times and input shift hours for the user. By default, the *Track All Time* option will be selected. If this option is deselected, you will be shown a weekly timetable with the option to input the particular hours during which you want the platform to collect data for the User (**Error! Reference source not found.**).

- *Figure 26: Setting Individual Working Hours.*

3.2.13 Lone Worker functions

To assign Lone Working functionality to a User navigate to the appropriate User within the User List View page and select *Action Rules* in the Actions column.

This will take you to the User Action Rules page for the individual you have selected, here you have 2 functions:

The User Action Rules section allows you to create a *Working Alone policy for the User.* Select the *Working Alone check box.* Once this option is selected, the following features can be enabled:

- Auto Vigilance Check (which allows you to automate push alerts that ask the Users to confirm they are okay.
- No Movement Detection (detects where the Users device has not moved for a defined period)
- Fall Detection (detects where a User Device has been subject to a sudden movement, such as a fall)
- SOS Button Pressed (to be used in case of emergency only)

Note: The SOS button will only appear within the Mobile App if you have enabled the SOS rule function for the user.

The OWL Platform enables the above Lone Working features to create Alerts. Alerts automatically appear as a push notification on the App or Tag for Mobile Users, allowing the User to respond with: "I am OK" or "Help". If the User does not respond to an Alert within 30 seconds, the OWL Platform will automatically work on the basis that the User requires assistance and notify according to the User Action Rules that have been set.

Once the Lone Working Alerts have been chosen, the Project Admin will be able to configure the following Action Rules for the User:

- Log Event (triggered Alerts will be stored on System Events page)
- Alert Dashboard
- Warn All Project Admins
- Warn Other Users (this option will provide a dropdown menu to choose the Users that will be notified)

As these Rules are created, and they can be created in any combination these will appear in the Rules List. This provides an account of all Rules and Alerts set for an individual User. To delete any Rules, select the checkbox to the left of the Rule in question within the Rules List and press the *Delete Selected* button, this rule will then be removed.

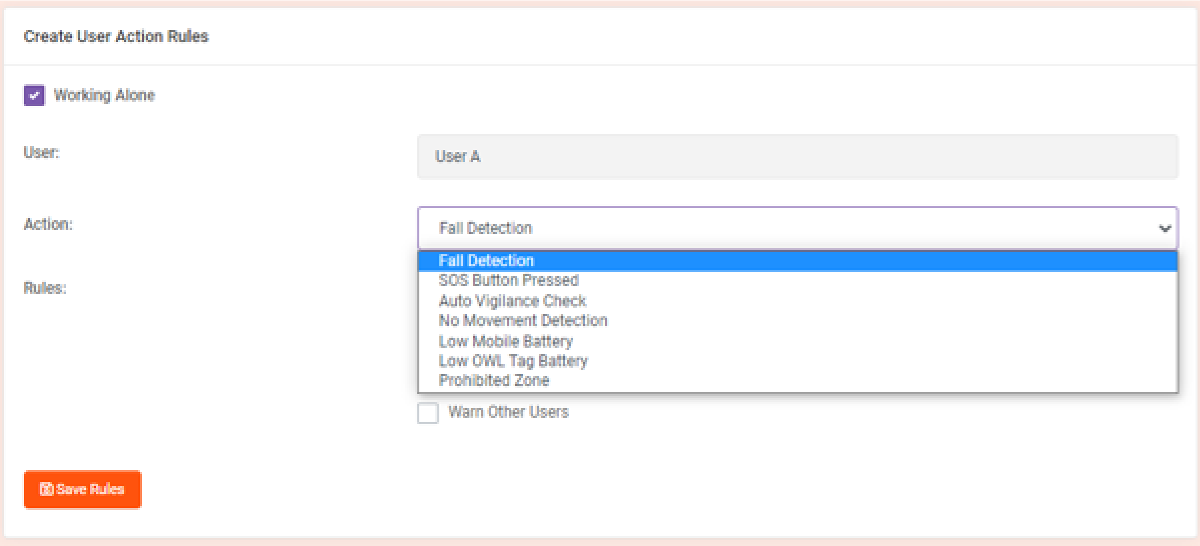


Figure 27: Lone Working Actions.

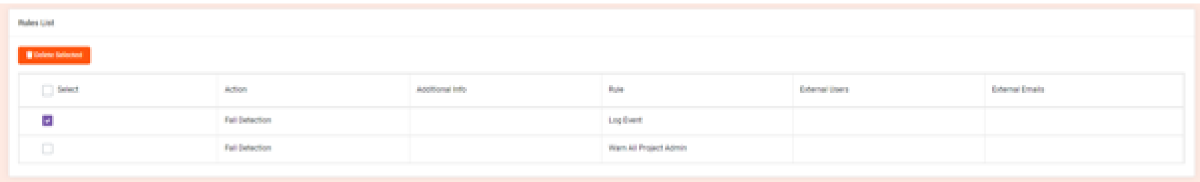


Figure 28: Rules and Alerts History.

3.2.14 User Action Rules

Besides the Lone Working Action Rules (*SOS Button Pressed, Fall Detection, Auto Vigilance Check* and *No Movement Detected*), the following User Action Rules are also available to be applied to Users:

- Low Mobile Battery
- Low OWL Tag Battery
- Prohibited Zone (informs User if they are within a prohibited Zone)

Once the Alerts have been configured, the Project Admin will be able to choose the following Action Rules:

- Log Event (triggered Alerts will be stored on the System Events page)
- Alert Dashboard
- Warn All Project Admins
- Warn Other Users (this option will provide a dropdown menu to choose the Users that will be notified)
- Warn Self (available only for the following Action: *Prohibited Zone*. This rule notifies Users that trigger one of the described Actions).

3.2.15 Batch Action Rules

The *Batch Action Rules* page can be found under the *Users* Menu. On this page, Project Admins can create the same Privacy Policy and Lone Worker Functionality as on the User page, but instead of applying to just one User these can be applied to multiple Users, either by selecting Users individually from the User dropdown menu or by selecting User Groups.

Once submitted, the configured User Action Rules will be applied to all selected Users.

Project Admins can also remove User Action Rules for multiple Users via the *Remove User Action Rules* window. After selecting the relevant Users and/or User Groups as well as the unwanted Action Rules, the Action Rules will be deleted for all selected Users after clicking the *Delete Rules* button.

Project Admins can apply Privacy options for Batch Action Rules in the *Change User Working Hours* window, located to the right of the screen. The following options are available:

- Monitoring in Zones (which allows Project Admins to select which Zones Users will be tracked in)
- Monitor All Time (can be deselected in favour of configuring specific tracking windows for multiple Users)

3.3 Plant

3.3.1 Intro to Plant

The Plant page displays all Plant and Equipment currently assigned to a particular Project (Figure 29). We would encourage companies to use the Plant function for managing their entire plant inventory as there are no charges for plant within the system until a Tag is attributed to it.

The Plant page shows the following information:

- Plant Name
- Registration #
- Type – the type of plant being used for the project, e.g. Project Admin
- Groups
- Plant Type
- Actions

The table has search fields on the Plant Name and Registration # columns that can be used as filters.

The Plant Name and Registration # fields can be edited on the table via the 'edit' icon (Figure 29).

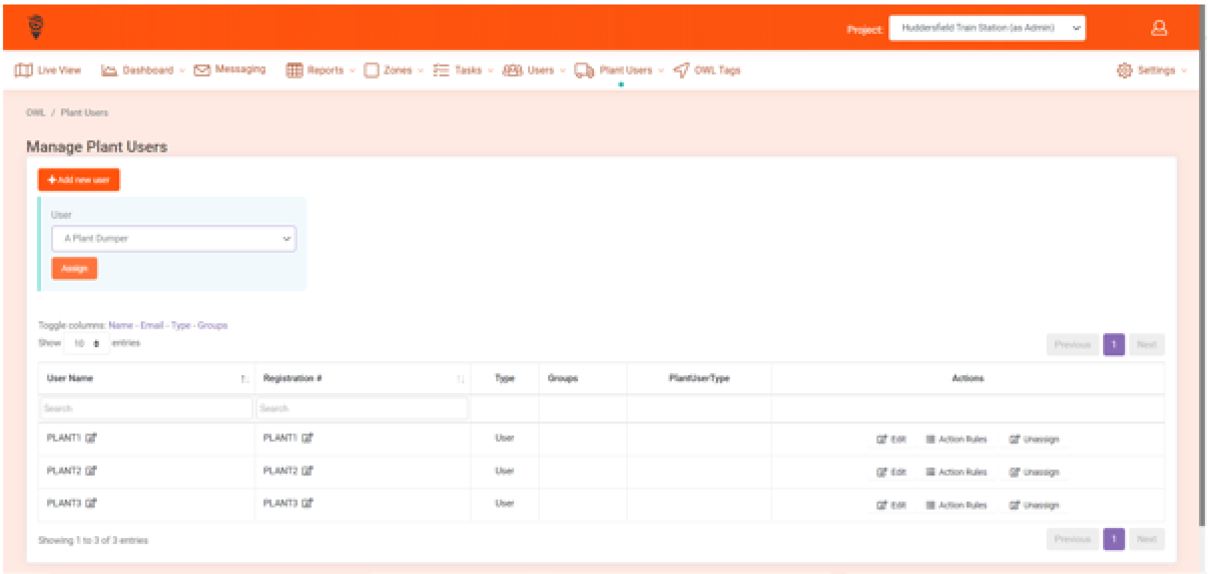


Figure 29: Plant list view.

3.3.2 Adding New items of Plant

Select the Add new Plant button at the top of the table on the Plant page (Figure 29).

Input the Identity/Registration and the serial number in the fields indicated (Figure 30).

Enabling the Is Active? checkbox allows the item of Plant to be visible on the Web Portal (Figure 30).

You may want to assign the Plant to a Plant Group. If the required Group has not been created, press the 'plus' sign to create a new Group.

> **Note:** A Plant can be a member of more than one Group; if this is the case a main 'Primary Group' can be assigned.

The appearance of your Plant marker on Live View can be configured, you may wish to define a policy for this to ensure Plant has an appropriate colour and icon combination. Marker icons can be selected from the Default icons, or a custom icon can be created by selecting this field at the bottom of the icon dropdown list.

If you have created Plant Custom fields these will be available for you to populate , as with User Custom Fields Plant Custom Fields can be in any format..

> **Note:** See section XXX for more information about Custom Field configuration.

Once finished, click Submit and the Plant will be saved and shown in List View.

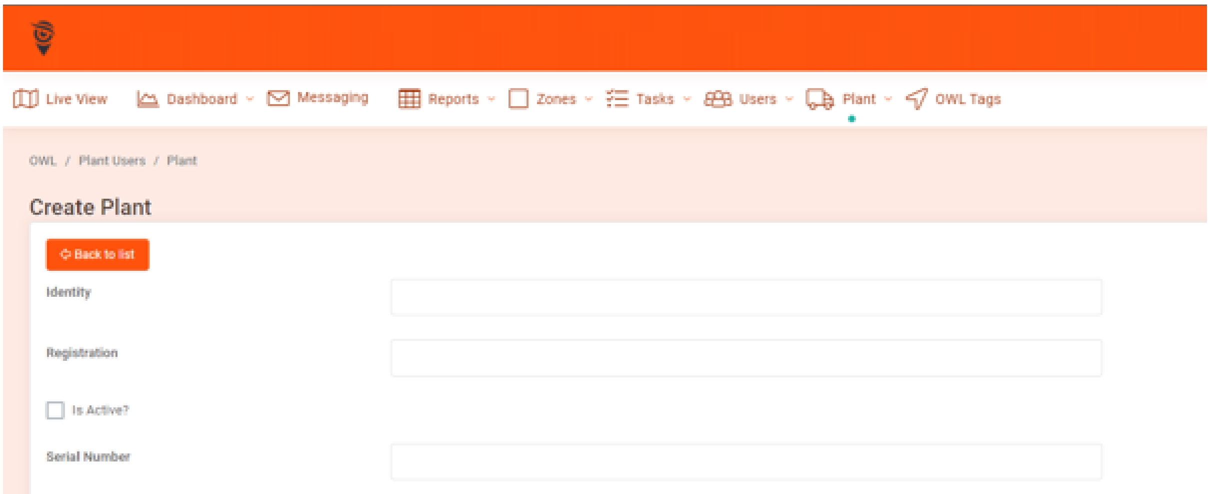


Figure 30: Registering plant.

3.3.3 Remove Plant Items

On the Plant page, select the row for the item of plant which you want to remove and click *Unassign* on the corresponding row. This will remove the item of Plant from your Project.

NOTE – The Plant Page is designed for you to maintain a complete record of plant on a Project and where possible we would recommend that you leave your plant items within the list, noting off hire and or return in the plant record.

> **Note:** Only Project Admins are able to unassign Plant from a Project

3.3.4 Plant Action Rules

The following Plant Action Rules can be applied:

- Low OWL Tag Battery
- Runaway Alert

3.3.4.1 Runaway Alert

Runaway alerts are designed to ensure that an item of plant is always maintained in close proximity with a controlling/ responsible User and or Responsible Group.

To create an alert define the Responsible Group or User, define the distance that they need to maintain to the item of plant within their control *Distance from Plant (m).*

Define the rules and alerts you want to be triggered if the Plant and Responsible User/Group separation is exceeded. Any combination of rules can be created. These will be displayed in the rules list and can be deleted or amended as required.

Th

3.4 OWL Tags

Tags are devices that work with the OWL platform and which can be assigned to Users or Plant in place of the Mobile App or in conjunction with the Mobile App for increased positional accuracy.

The OWL Tags page allows you to view and manage the Tags that have been issued to the Company or Project.

> **Note:** Tags are allocated to Projects by a Company Admin.

The Tag page, Figure 31, shows you information related to the Tags: *Name, Serial Number, Sale type* (Hire or Sale), *Type* (Zero, Plus, Vehicle TRK), *Battery Level* and *Last Timestamp*, as well as associations to Users, User Groups or Plant.

Project Admins can assign OWL Tags to Users or to items of Plant by clicking the *Assign / Change* button under the User column and selecting the desired User or Plant Item from the dropdown menu labelled *Assign to OWL Tag*.

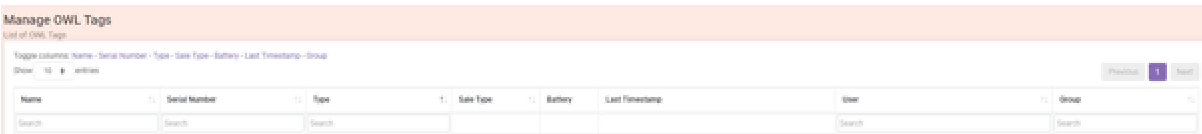


Figure 31: OWL Tag management page highlighting filter and search.

To sort the information within table, click on the arrow icons in the header of the column that you would like the data to be sorted. The icon will then change to indicate whether you have sorted the data in ascending or descending order, simply re-click the table header to change the sort order.

If you are looking for a specific item, you can use the search fields available under certain columns to filter the information within the table.

3.5 Zones

3.5.1 Intro to Zones

The Zones module is where you create your virtual areas or geofences, where Zone Action Rules can be configured to alert your teams based on the relative movement of Users or Plant to the Zones which you have created.

Zones can be used for many purposes, some examples include: to warn users of fixed hazards, to provide positive confirmation of location, to exclude users from Plant operating areas.

Zones can be created by Admins and Users with the necessary *Add & Edit Zones* Permissions applied. Once zones have been created, these Zones will be available for use within the Project.

OWL supports the creation of several Zone types:

- Polygon (includes circles),
- Road Route,
- Single Point Marker.

Zones can be static, those created by drawing, plotting within OWL or importing KML shapes, or they can be dynamic so that they move relative to a centre point of an OWL device (Mobile App or Tag) which has been allocated and which is in use with a User or item of Plant.

- Exclusion Zone around User (section **Error! Reference source not found.**) – always a c ircle zone
- Exclusion Zone around Plant (section **Error! Reference source not found.**) – always a c ircle zone

As well as the type of the Zone, OWL provides several ways for you to create Zones:

- Drawn using the in-built Google Map interface within OWL (section 3.5.2.2)
- Through the entry of Longitude and latitude coordinates (section 3.5.2.3)
- Through the import of shape files (KML format) (section 3.5.6)

3.5.2 Creating Fixed Zones

To increase flexibility within OWL, Zones can be created at three levels within the Platform:

- Company, and
- Project.

Global Zones will be created and managed by Onwave and the intention is to allow Customers to consume or use these as required. Company Zones are set at the Company level and are cascaded to all Projects and Project Zones are specific to individual Projects. As a general rule zones are principally created within a Project.

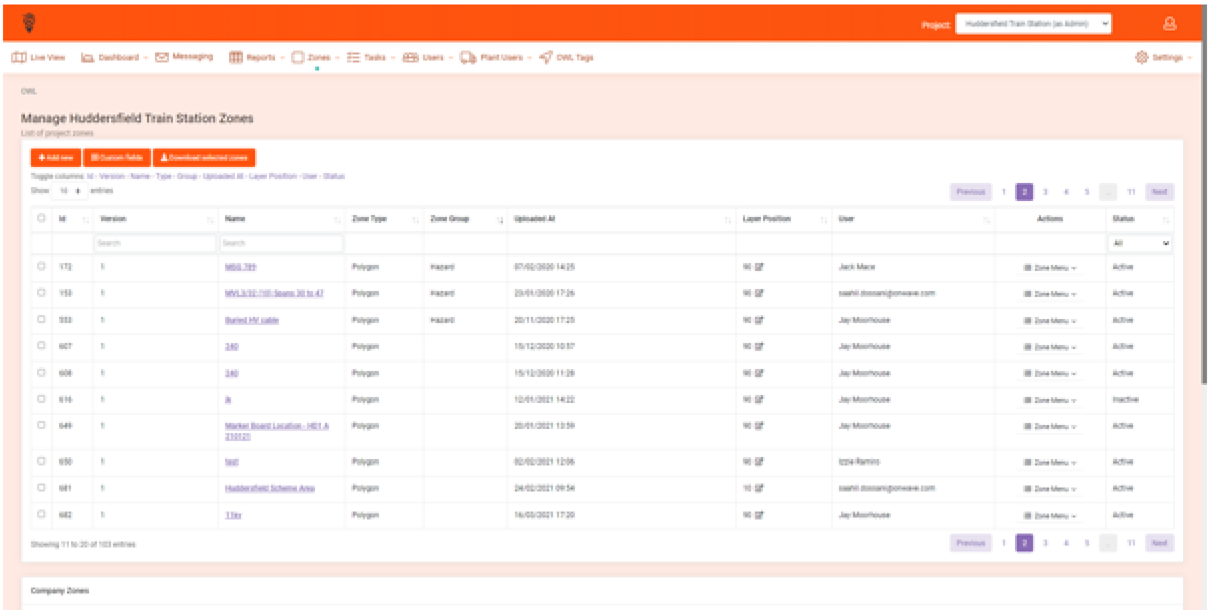


Figure 32: Zones Page.

The Project Zones page shows a list of all Zones and is split into 3 tables corresponding with the above structure:

- Project Zones (appear at the top)- all Zones created and managed by the Project.
- Company Zones - all Zones created and managed in the Company Account
- Global Zones - all Zones set by Onwave. These cannot be changed by your company

NOTE- Where no Company or Global Zones have been created these may be empty tables.

The Menu in the Actions column of the Zone page allows Admins to edit, clone and delete Zones, to configure Action Rules and to download Zones.

To create a new zone click the *Add new* button at the top of the Zones Page, this will take you the Zone Page, where you will need to add your Zone information.

Zone information

The zone data is entered in the table to the left of the Map, default values are set for several fields (Zone Type/Version/Zone Group/Make Recurring and Layer Position) these can all be changed.

Note: The required fields are marked with an asterisk and the zone cannot be saved without their completion.

You should enter the following information

- Zone Title – The Name by which you want your Geofence to be known.
- Zone Type – This will define which options you have available for creation of your zone and will define whether your Zone is fixed or dynamic.
- Version – This will auto increment as you change your zone so you have a history of what has been amended.
- Zone Group – This allows you to collect info related to a specific grouping for example (Hazards/Access Points/Work Areas etc) Additional info on how to create your Zone Groups is shown in section XXX
- Zone Text Mobile – This field is the field that will be displayed when your Users click on a zone within either the mobile App or on Live View.
- Make Recurring – This offers you the opportunity to make your zone work repeatedly as defined time intervals.
- Date From – Zones can be configured to only operate and appear on the Platform from a certain date or time, this field should be left blank if you want your zone to start immediately.
- Date To – Zones can be configured to only operate and appear on the Platform up-to a certain date or time, this field should be left blank if you want your zone to continue indefinitely or until you deactivate it.
- Layer position – Zones can be assigned layers from 10-90. The default is set to 10, the lowest level. Layer position allows Zones to be placed in a vertical hierarchy within a Project. For example, two Zones could be created in the same place, and one may be hidden from view beneath another, leaving the Admin unable to access Zone details. This issue can be solved by adjusting the values in the Layer positions.
- Alerts from User Groups – when left blank the zone will apply to all users. If you select Groups from this list the Zone will only function for users within that specific Group.
- Visible for User Groups – when left blank the zone will appear on both the portal and mobile app for all users. If you select Groups from this list the Zone will only appear for users within that specific Group or Groups
- The Is Active? checkbox is selected by default. If this box is deselected, the Zone becomes inactive and no longer appears on the portal or mobile app and all functionality related to the Zone is disabled.
- Polygon Options - this allows you to define how your Zone will appear to users included the colour and opacity of the Zone (**Error! Reference source not found.**).
- Any content saved in the Zone Text Field will then be displayed for Mobile Users when the Zone is selected in the App.

> **Note:** Polygon Options are not available for uploaded shape files (see section **Error! Reference source not found.**).

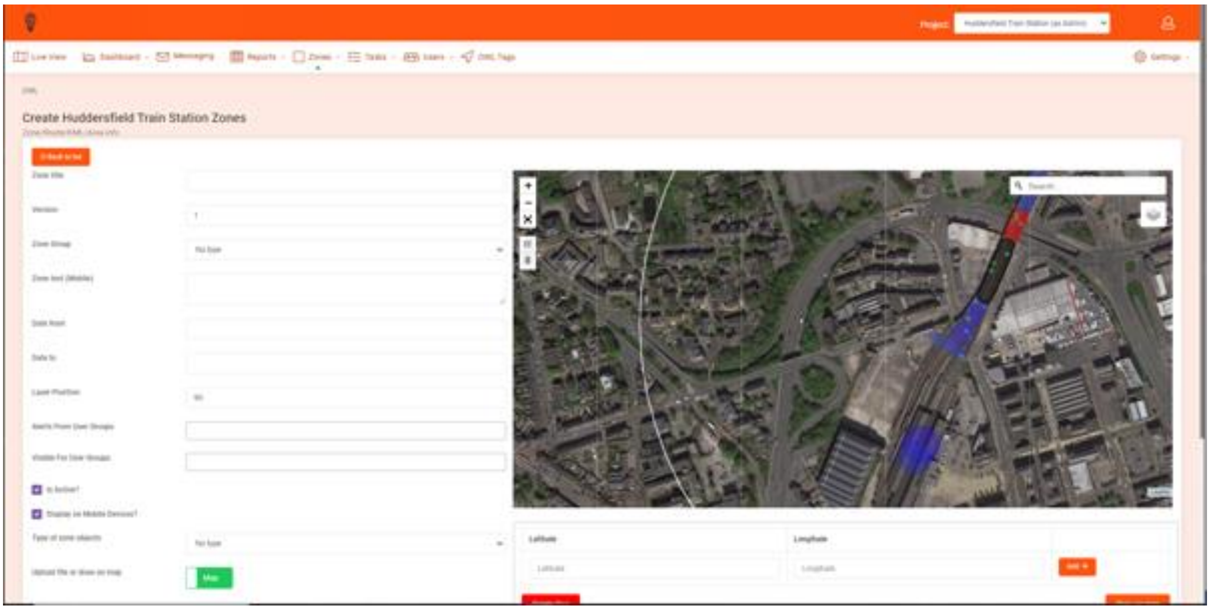


Figure 33: Creation of a Zone

3.5.2.1 Creating a Fixed Zone – Polygon

When selecting *Polygon* from the Zone Object dropdown menu, the icons will change accordingly on the map view to the top right of the page.

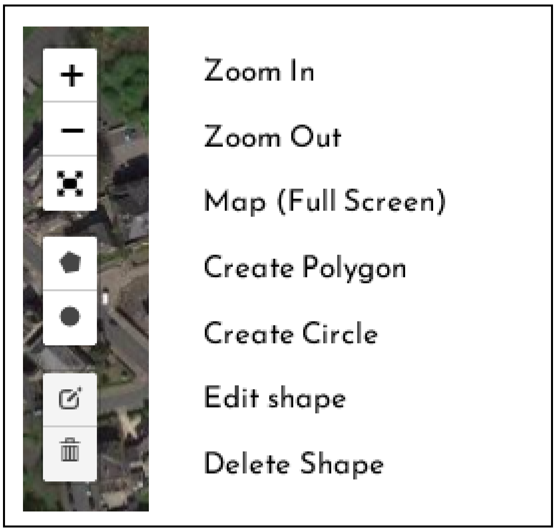


Figure 34: Polygon Icon Options.

Drawing the shape on the map:

To help you navigate the right area you can enter the address of your site into the search box to the top right of the map view.

To start drawing select the Polygon icon to the left of the map and simply click on the location where you want the first point of your Zone to be on the map. As you place each point, the lines of the Zone will be drawn.

NOTE – To assist with drawing larger shapes, the map can also be temporarily expanded to full screen by using the expanded map view icon.

If you make an error, you can select either the Delete last point button or the Cancel button, located to the right of the polygon icon.
If a polygon is complete but incorrect, it can be deleted by clicking the rubbish bin icon and selecting *Clear all*, or edited by clicking the Edit button which will highlight the points of your zone, these can then be dragged and dropped the points of the polygon to amend the shape.

Once you have drawn the Zone you will need to be sure that you close the polygon by ensuring your final mark corresponds with the first point that you created on the Polygon, this will complete the Zone and allow you to click Finish.
The map view style can be changed by hovering over and selecting the layer icon on the top right of the map window.

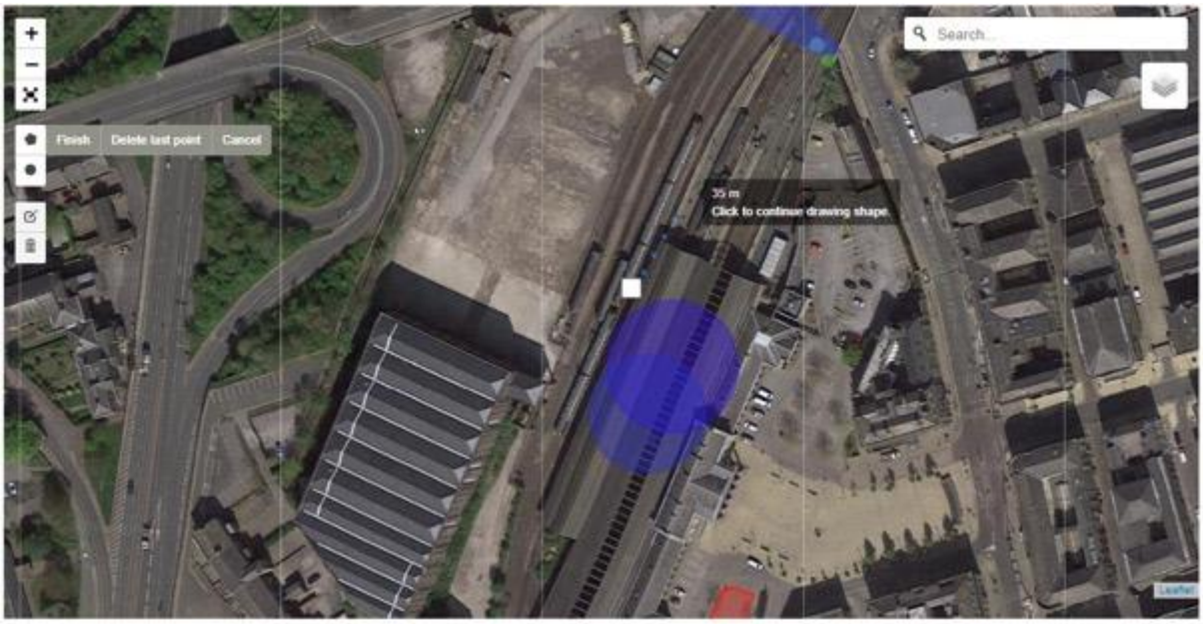


Figure 35: Drawing a Polygon.

3.5.2.2 Creating a Circular Zone

To create a circular Zone, simply select the circle shape below the polygon on the map, then click and drag to draw the circle.

If you make an error, you can delete it by clicking on the bin icon and selecting Clear All. Errors can be corrected by selecting the Edit option and altering the points of the circle.

Figure 36: Drawing a Circular Zone.

3.5.2.3 Creating a Zone using coordinates

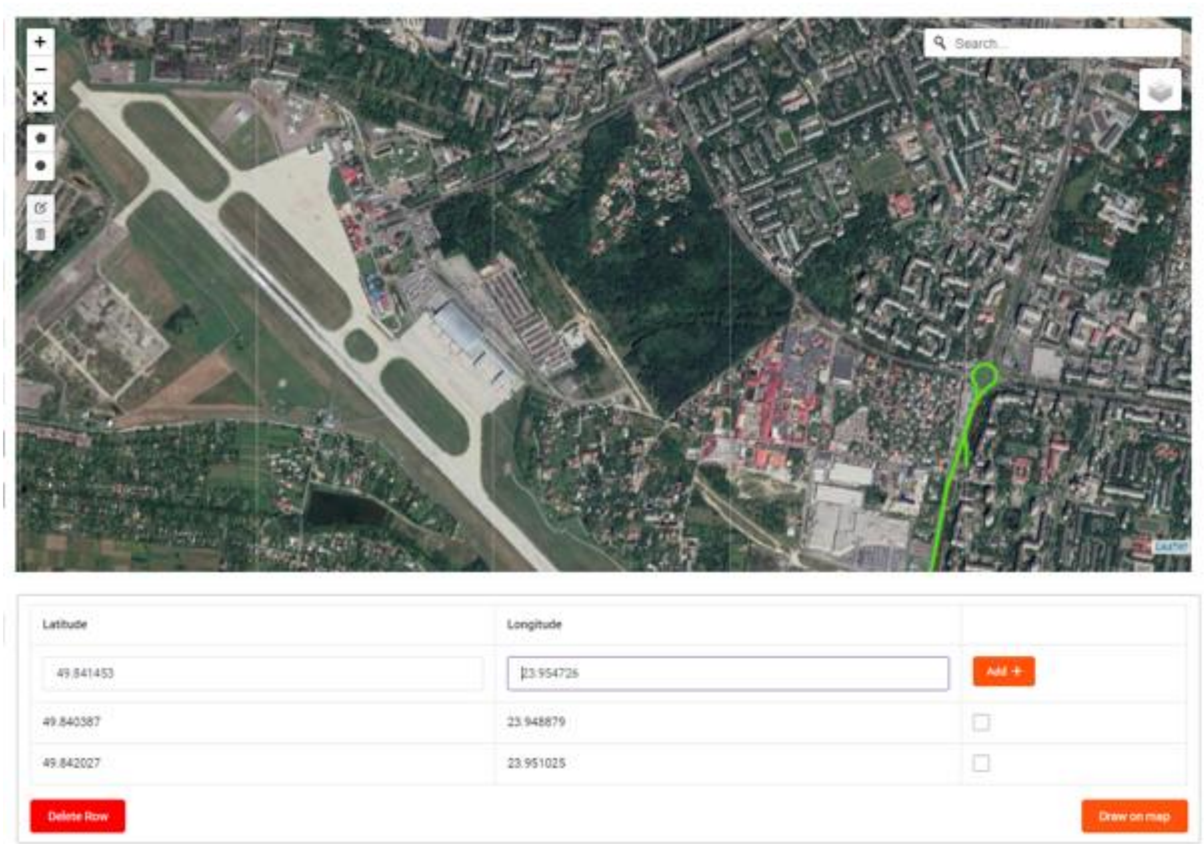


Figure 37: Longitude and Latitude Coordinates.

If you have the exact longitude and latitude coordinates, they can be entered in the fields below the map. To add more coordinates, click the Add button.

If the wrong coordinates are added, tick the box to the right of the incorrect coordinates and select Delete row.

Once all coordinates have been added, tick the box to the right of the coordinates and click Draw on map to add the shape to the map.

Note: A minimum of 3 sets of coordinates are required to create the polygon.

3.5.3 Creating Dynamic Zones

3.5.3.1 Creating a Dynamic Zone around a User (based on their current location.)

An Exclusion Zone Around User creates a dynamic Zone of a defined radius around a moving position, in this scenario the User location either reported by the mobile App (provided this is running) or the OWL Tag (provided this is running and attributed to the User selected)

To create an Exclusion Zone Around User, you must set the Zone Type dropdown to Exclusion Zone Around User. You will then be required to set:

- The Name of the User you want a zone created around
- The Radius you want set around the user - Custom Radius (set in Metres)

The map to the right of the screen with take you to the User's current location, it will show them as a single point marker and as the custom radius is entered the zone will be added.

For customisation of the zone colours etc, scroll down to Polygon Options to change the colour of the zone.

3.5.3.2 Creating a Dynamic Zone around Items of Plant (based on their current location.)

An Exclusion Zone Around Plant creates a dynamic Zone of a defined radius around a moving position in this scenario the Plant location reported by the OWL Tag (provided this is running and attributed to the User selected)

To create an Exclusion Zone Around Plant, you must set the Zone Type dropdown to Exclusion Zone Around Plant. You will then be required to set:

- The name of the item of Plant you want a zone created around
- The Radius you want set around the Plant - Custom Radius (set in Metres)

The map to the right of the screen with take you to the current location of the item of Plant you have selected, it will show as a single point marker and as the custom radius is entered the zone will be added.

Note: When Single Point Marker is selected in the Zone Object dropdown menu, the icons will change accordingly on the map.

For customisation of the zone colours etc, scroll down to Polygon Options to change the colour of the zone.

3.5.4 Creating a Road Route

Figure 38: Route Icon Options.

Figure 39: Route Marker.

When Route is selected in the Zone Object dropdown menu, the icons will change accordingly on the map.

Navigate to your start and end points using the search field on the map or by dragging with your mouse.

To start drawing, select the Route marker point to the left of the map and place your start point. Click the marker icon on the left again and place your end point on the map (**Error! Reference source not found.**).

Note: If you make a mistake at any point, press the rubbish bin icon and select *Clear All.*

The route will be added to the map in a light blue colour, the route colour can be changed by using the Polygon Options colour chooser. Once the route colour has been chosen, click Save and Next and you will be taken to Action Rules.

3.5.5 Creating a Single Point Marker

Either by using the search field on the map or by dragging with your mouse, find the appropriate area for the point marker on the map.

Chose Single Point Marker in the zone type dropdown menu, the icons on the map will change to provide you with a marker icon.

Figure 40: Single Point Marker Icon Options.

To position your marker, click on the single point marker to the left of the map and place your point on the map. If you make a mistake, click the bin icon and select Clear All. The Single Point Marker will be displayed as a light blue marker.

On your single point marker you will only have the ability to create alerting rules that are based on Approach to this location.

Figure 41: Single Point Marker.

3.5.6 Creating a Fixed Zone with a KML

On the bottom left of the Zone creation page, there is a toggle button that gives you the option to draw on the map or import a shape from a KML file. As default, it will be set to draw on the map.

Once you have set the toggle to *Upload a file* you will be given option to browse to your file structure. Click this browse button, this will open your explorer menu, you should locate the file on your computer and select the file. Provided the file is in compatible .kml file format it will be uploaded.

NOTE- As KML files can often have multiple shapes within the same file object if you use this option you can only apply a single set of policies to these zones. If you need to apply multiple policies you should split down your KML file.

Once finished, select *Save and Next*.

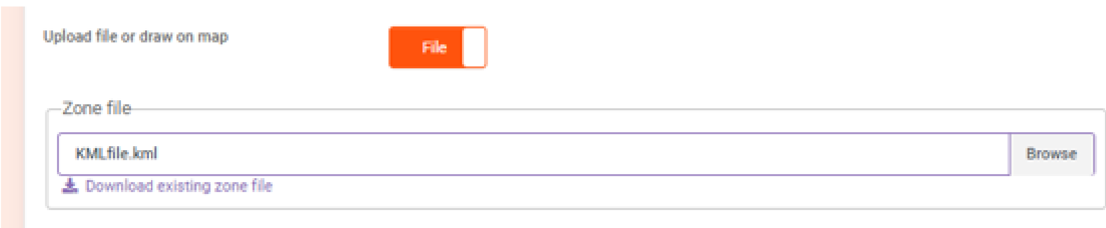


Figure 42: KML Upload.

3.5.7 Making your Zone Recurring

To make a Zone recurring, slide the Make recurring toggle to "Yes" while you are creating your Zones Creation or when editing a Zone. Shown in **Error! Reference source not found.**.

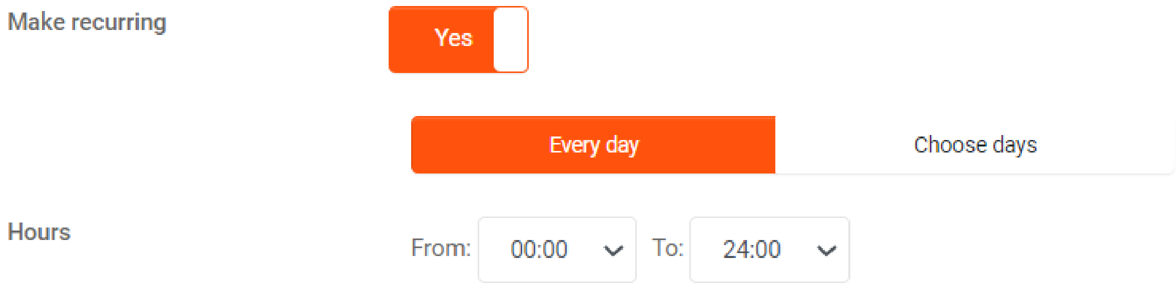


Figure 43: Reoccurring zone toggle.

Once this has been enabled, you then configure this to select days or every day, shown in **Error! Reference source not found.** and **Error! Reference source not found.**.

Figure 44: Configuring zone toggle.

3.5.8 Configure Zone Action Rules

Once you save your Zone, the Platform will automatically take you to the Zone Action Rules page. You can also navigate to this page using the button at the top of the Zone page.

Zone action rules is where you can set the policy and alerts for your zones.

You will be given the option to define conditions for example entering, leaving or approaching a Zone and to combine these with Actions for example Alerting Device User, Logging the Event, Alerting other users.

We support four conditions for each Zone although this list will be automatically reduced for Zones which are either Road Routes or Single Point Markers:

- Approach - Trigger for alerts and notifications for when a User/Plant Items enters the area of the geofence zone, the approach distance is completely configurable and is separately entered, you can have multiple approach conditions working together.
- Entering – Trigger for alerts and notifications when a User/Plant Items enters the area of the geofence zone
- Leaving – Trigger for alerts and notifications when a User/Plant Items leaves the area of the geofence zone
- Expire – Trigger for alerts and notifications for when your geofence zone (with defined time parameters) is coming to an end. This is based on the Date to field you have defined when creating the zone. Simply define the time in minutes before your Zone expires that you want to trigger an action.

  - Density – Trigger for alerts and notifications based on a permitted number of users within a defined zone.

Once you have selected from the above list of conditions you can define the actions that you would like the system to complete when these conditions are met, again this list will change based on the condition you have selected:

- Alert Device User – Each time a User sets off an Alert, a Notify Users popup will appear. Within the popup is a checkbox where you can select specific Users (or even all Users) to be notified of the Alert.
- Log Event – Triggered Alerts will be stored on System Events page.
- Alert Dashboard
- Notify Other Users – If a User account has the Notify Other Users? option selected, they will receive push notifications and email notifications (provided an email address has been assigned to the account). Push notifications are only received if the User is logged into the Mobile App.
- Notify All Project Admins – If this option is selected, all Project Admins will receive push notifications (should they be logged into the mobile app) as well as email notifications, in the event that the configured Action Rules are triggered.

Rules are completely customisable and are cumulative so you can combine conditions and alerting, as Rules are created these are added to the Rules List and can be deleted or amended as required.

Once you have selected your Alert, you will be prompted to select the type of Alert you get Configurable Alert, which will determine how the Alert is communicated via the Mobile App or OWL Tags. There are 5 default Alert types with varying levels of intensity:

- A – Maximum Risk Alert (audible, haptic and strobe alerts are set to 'high' with a frequency of 6 for an infinite duration)
- B – High Risk Alert (haptic and strobe alerts are set to 'medium' with a frequency of 6 for a duration of 2 seconds)
- C – Medium Alert (audible, haptic and strobe alerts are set to 'medium' with a frequency of 2 for a duration of 1 second)
- D – Low Alert (audible, haptic and strobe alerts are set to 'low' with a frequency of 1 for a duration of 3 seconds)
- E – No Alert (audible, haptic and strobe alerts are disabled).

Alerts can be removed by selecting the checkbox to the left and clicking the button labelled *Delete Selected* above the table.

The User Density Rule can be enabled for selected Project Zones. This rule informs a User if they have entered a Zone and exceeded the maximum amount of Users permitted within the Zone. Users will be informed of this via push notification. To set the User Density Rule, select the *Notify if User count exceeds max count* checkbox and set the number of Users in the *Max user count* field.

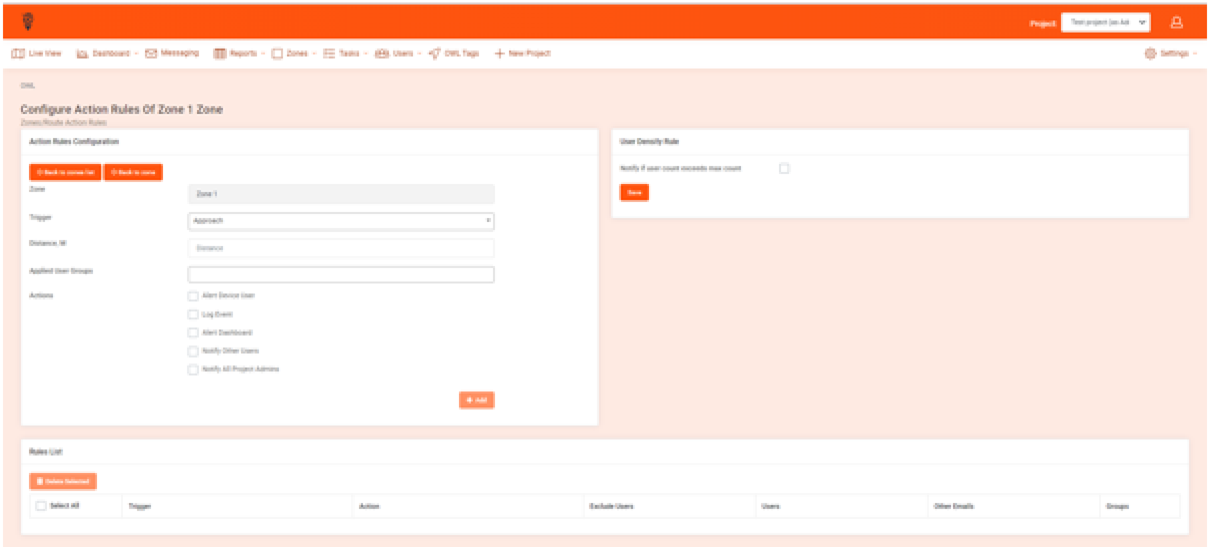


Figure 45: Configure Action Rules Options.

3.5.9 Clone Zones

To clone an existing Fixed Zone, select the Zone Menu and click on the *Clone* button. A prompt window will appear; select *Yes.* You will then be redirected to an edit page for the cloned Zone.

Cloned Zones will have the same location and informational attachments as the original Zone. The only differences between cloned and original Zones are the version number and the upload date. The default version number for cloned Zones is 1.

If you need to place the cloned Zone in a different location on the map, select *Edit Layers* on the map, drag the Zone to its new location, and click *Save*.

The configured Zone Action Rules will not be cloned from the original Zone.

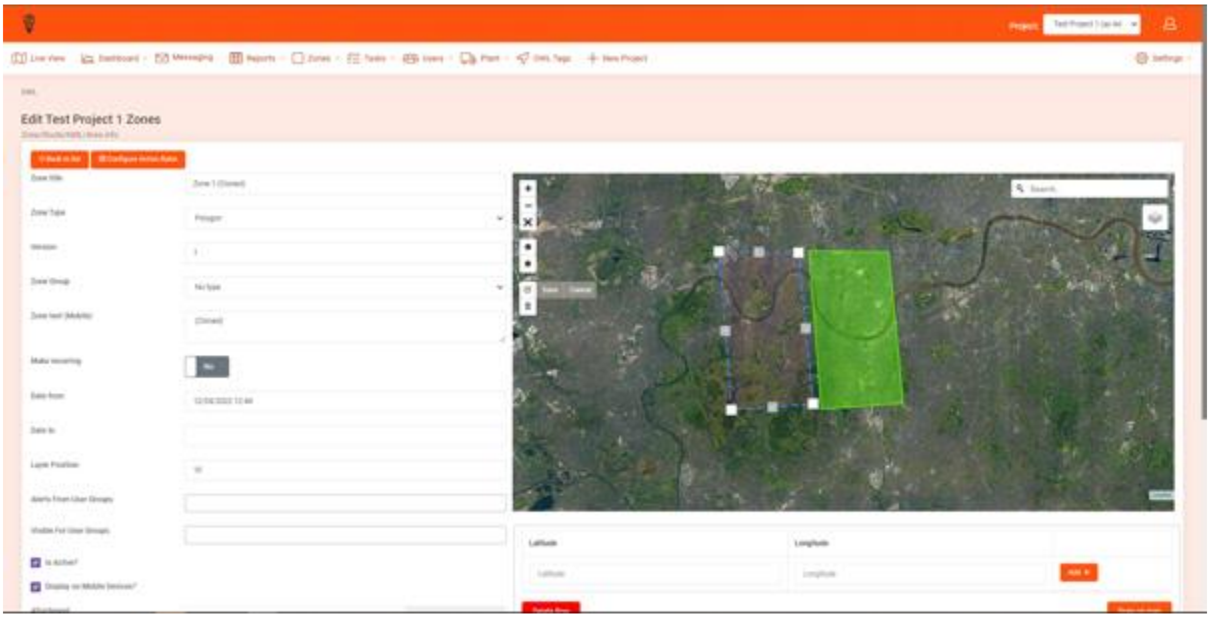


Figure 46: Cloning a Zone.

3.5.10 Zone Custom Fields

Custom Fields can be set for your Zones these allow you to categorise or select specific functions you can also create a file type Custom Field that would allow you to include Toolbox talks or specific information as an attachment for the zone.

Zone Custom Fields can be added and removed from the Zone Custom Fields page this is accessed via the *Custom Fields* menu under the main *Zones*menuThis page will initially display a list of any Custom Fields that you have created with the following information :

- Field Name
- Type
- Actions

To create a new Custom Field, select *Add new* and you will be taken to a Zone Custom Field creation page where you will need to define the:

- Field Name
- Field Type, which can take several forms:
    - text
    - number
    - email addresses
    - dates
    - true/false
    - files (or attachments).

Custom Fields that have been added will appear at the bottom of the Zone Management page, this allows data to be added as Zones are created.

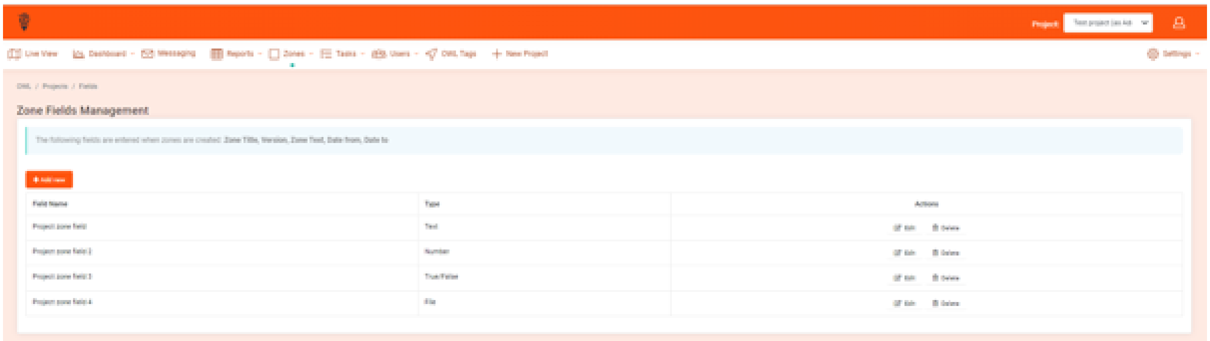


Figure 47: Zone Custom Field List View.

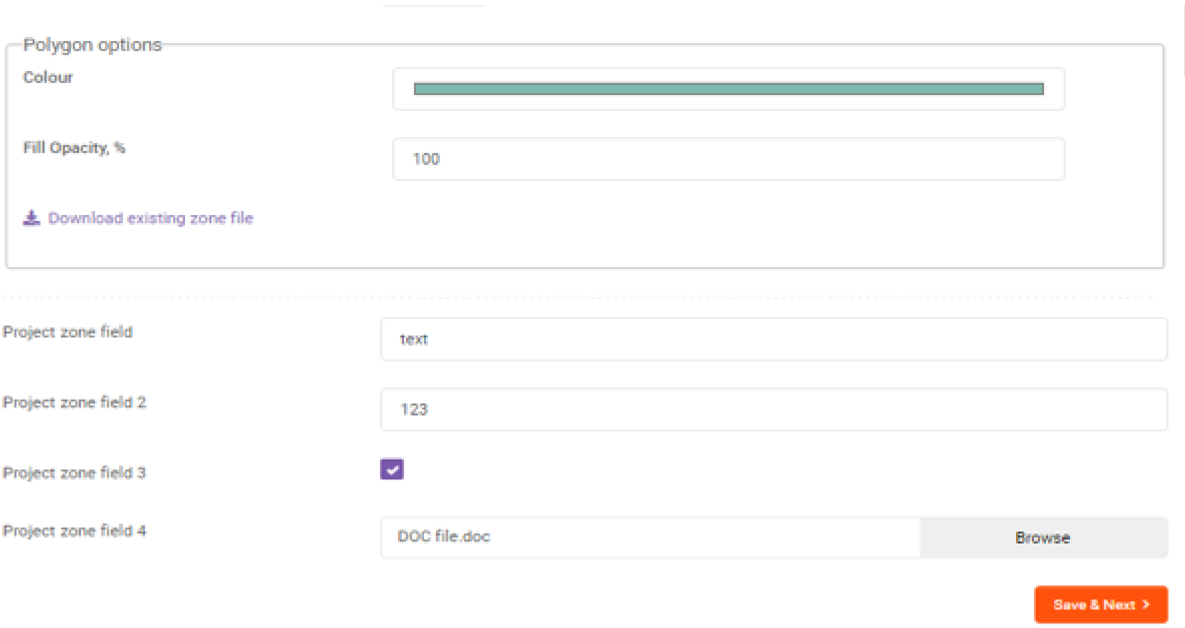


Figure 48: New Zone Custom Fields Added.

3.5.11 Zone Groups

You can create and Edit Zone Groups by navigating to the *Zones Groups page from the Zones Menu.*

The following default Zone Groups are built within the application as standard and do not need to be added:

- Breakout
- Hazard
- Plant
- Task
- Walking Route
- Work Area

To create a new Zone Group, click the *Add new* button and enter the name of the Group and press *Submit*. The Zone Group will be added to the Zone Group list and can be selected for any new or existing Zones.

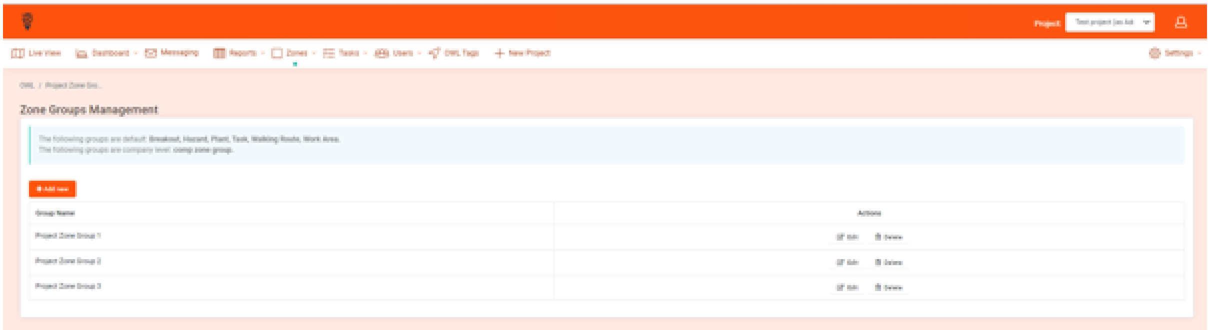


Figure 49: Zone Group List View.

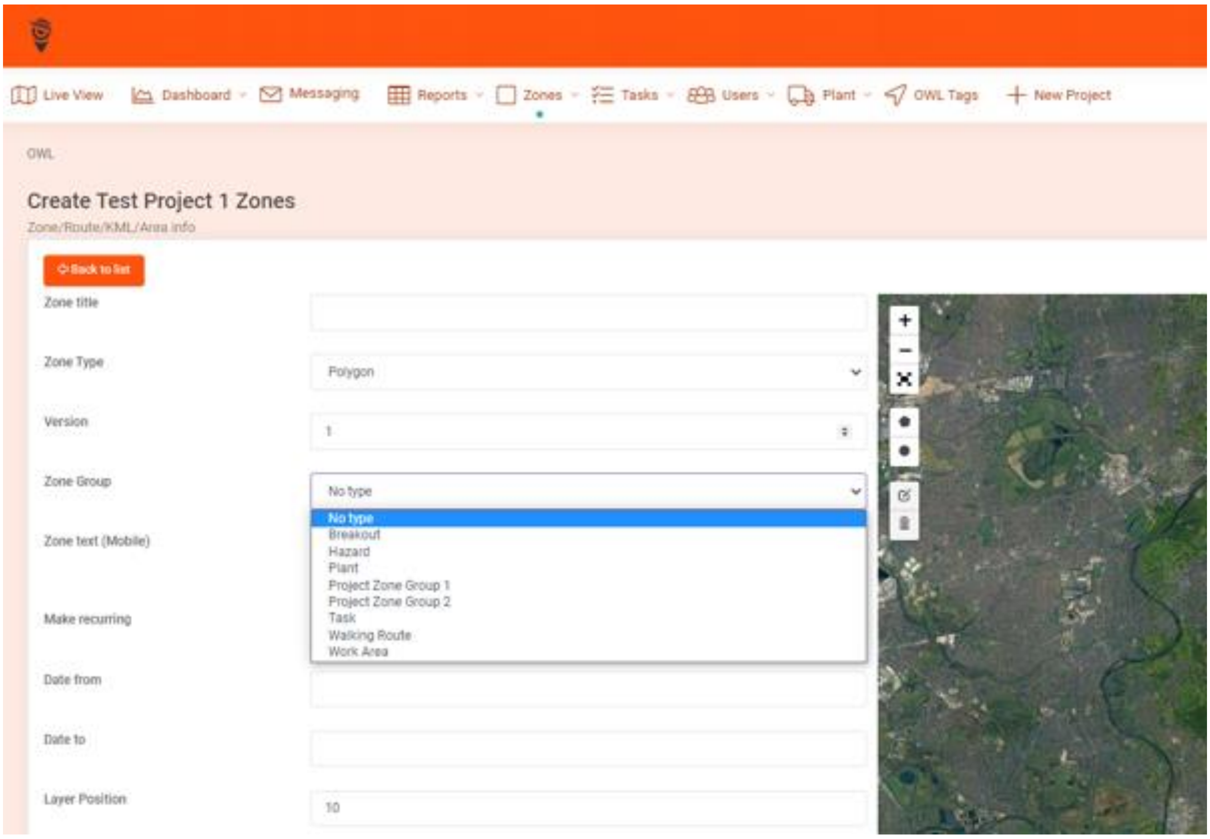


Figure 50: New Zone Group Added.

3.5.12 Download Zones

To download a kml shape file for your Zone, select the checkbox to the left of the Zone and click *Download selected Zones*. A .kml for the Zone will be downloaded and will appear in your downloads folder.

3.6 Tasks

3.6.1 Intro to Tasks

The Task page can be found the main navigation (Figure 51).

The Task List is where all current Tasks can be viewed.

New Tasks can be created on this page by selecting the *Create Task* button. Tasks do not have to be created on the OWL-platform, as they can be imported via CSV files.

Once a Task has been created you will find an Actions column on the Tasks Page a dropdown of options labelled *Task Menu* will be made available. The dropdown contains shortcuts to *Edit* or *Delete* selected Tasks, as well as options to *Configure Action Rules, Create Subtask* and *Create related chat.*

Tasks are made available for Users to update and view via the Web or Mobile App. Allocated or Admin Users will have the option to update Task Notes or the status of the Task.

To quick edit a Task status, select the pencil icon next to the current status within the 'Status' column and a dropdown menu will be shown with all available status options.

As well as the standard tabular view of tasks you can also look at Tasks within a Gantt style view and a calendar style view by selecting these options from the drop down list

Custom Fields relating to Tasks can added and removed by clicking the *Custom Fields* button, which will redirect you to the Task Fields Management page.

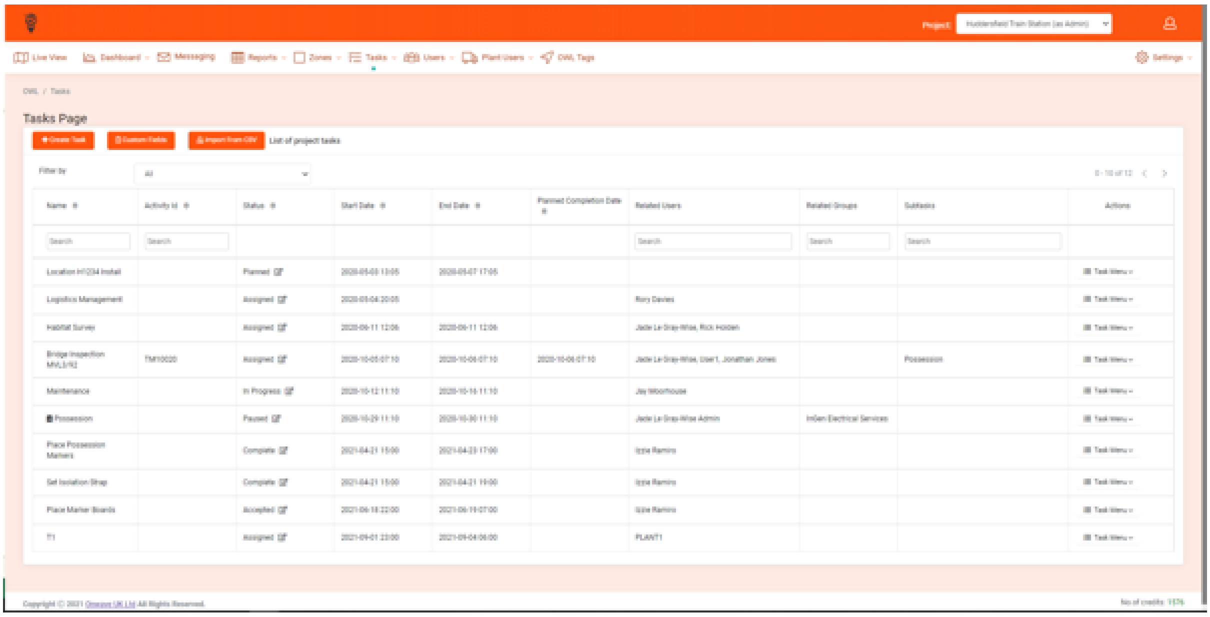


Figure 51: Tasks List View.

3.6.2 Creating a Task

To create new Task you can:

- Use the Create Task button within the Task List page, or
- Click on a day within the Calendar View to initiate the task (see 3.6.3), or
- Import Tasks from a CSV file.

3.6.2.1 Using the Create Task Button

The Task Page is where you can enter the full details related to your task:

- Task Title – What you want your task to be called this will be visible on the mobile app when attributed to a user or user group.
- Description – A more detailed description of your task
- Activity ID – Gives you an option to include a reference ID this may map to your master programme activity
- Users – This is where you can allocate the task to an individual user. This will then appear in their task list within the mobile app.
- User Groups – This is where you can allocate tasks to a group of users rather than an individual.
- Zones – This is where you can define which zones are relevant to the Task
- Change Associated Zones Status
- Parent Task – This is where you can make one of your existing Tasks a Parent of the task you are creating.
- Overdue Reason – This is where you can capture information related to overrunning or delayed tasks
- Date From
- Date To
- Planned Completion Date
- Attachments – This is where you can attach documents for example method statements, risk assessments etc associated with your task, these can be opened in the mobile app.
- Task Notes- which allows you to capture any general information or records related to the task.

Once you have entered the relevant task information or following editing of the task you can click on Save & Next and you will be taken to the Task Action Rules page, see section 3.6.3

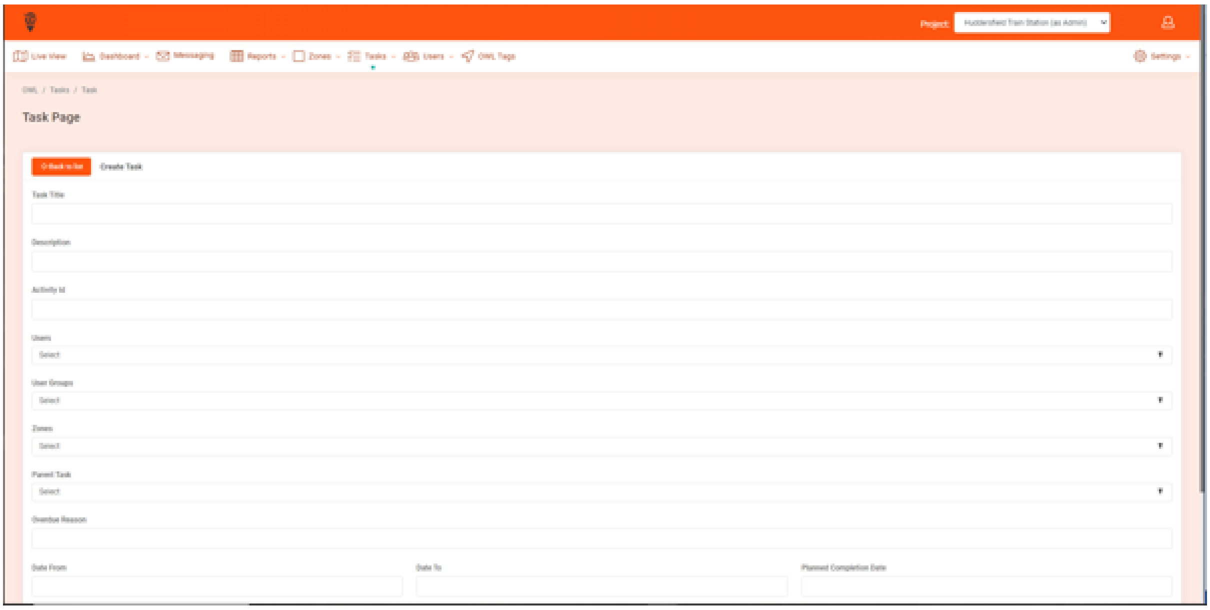


Figure 52: Creating a Task.

3.6.2.2 Using the Calendar

New Tasks can be created from the Calendar page, which is found under the *Tasks* button on the main navigation.

To create a new Task, select an appropriate day in the Calendar; a popup will appear. Enter the Task title and select dates for the *Date From* and *Date To* fields, and click *Save* once finished. This will automatically take you to the Task Creation Page where you can add the additional information

3.6.2.3 Importing from CSV

Click the *Import from CSV* button on the Task List Page.

The popup will appear to allow you to set the separator/delimiter on your CSV. You can select the separator you would like (default value is semi colon), once selected you can click on the hyperlinks to download a template file or an example file which will allow you to see the format you need to input all User information and complete their profiles.

The template will provide you with the following fields to populate, Activity Id, Name, Description, Start date, End date and Planned Completion Date.

Once you have created your import file in CSV format, you can simply Choose this file to import your Tasks.

What fields can you import???

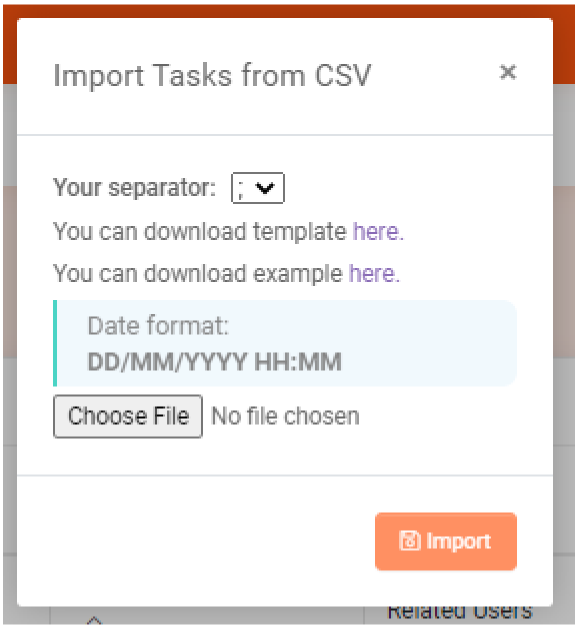


Figure 53: Import to CSV.

3.6.3 Task Action Rules

After saving a Task, the Platform will direct you to the Task Action Rules page. This page is where you can trigger actions based on a change in status of the Task.

A pre-defined set of task statuses exists for each Task: *Accepted, In Progress, Paused, Complete, Failed* or *Complete Confirmed.*

To create an action rule, select the change in state you want to know about, for example task changed to Complete. Having selected the change of state you can trigger some automated Actions:

- Log Change in Task Status – all triggered Events will be stored on the Events page
- Alert Assigned Users of Task Status Change – Users assigned to the task will receive a notification (either a push notification for Mobile Users or an email notification for other Users) whenever the status of a Task they are assigned to is changed
- Alert All Project Admins of Task Status Change – all Project Admins will receive a notification when the status of any Task assigned to a Project is changed
- Alert Other Users of Task Status Change – all Users selected in the *Notify users* menu, as well as any email addresses provided in the *Emails* field, will receive a notification whenever the status of their assigned Task is changed.

Rules are completely customisable and are cumulative so you can combine conditions and alerting, as Rules are created these are added to the Rules List and can be deleted or amended as required.

3.6.4 Task Calendar

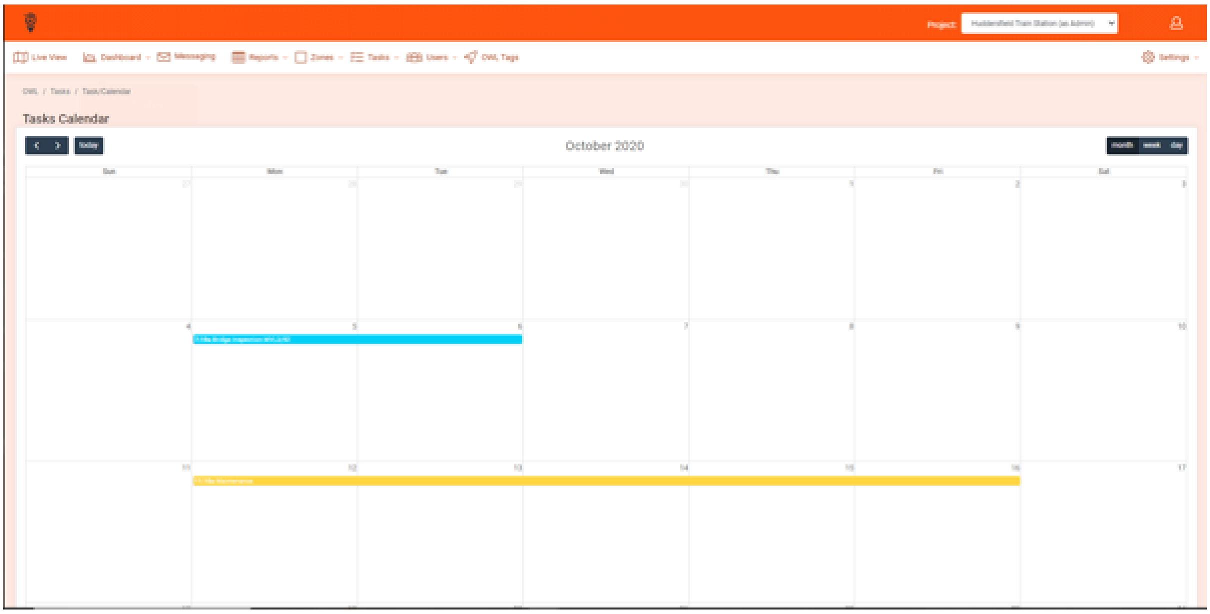


Figure 54: Date From, To and Planned Completion Date Calendar.

The Calendar Page is an alternative view for your tasks.

All Tasks you have created are displayed in the Calendar in the different colours according to the Task's status. The colour key (labelled as Colour Legend) can be found at the bottom of the Calendar page.

The Calendar page's interface can be changed by selecting either *Month, Week* or *Day* on the right of the page.

You can add new tasks by clicking on the white space on a day within the calendar view (see 3.6.2.2) this will open a new task wizard.

You can also navigate to the task page for specific tasks by simply clicking on the task you want to open.

3.6.5 Gantt Chart

The Gantt Chart page is an alternative view for your tasks.

All Tasks are displayed on the Gantt Chart according to their date-time range. Tasks are displayed in different colours according to their current status.

The Colour Legend can be found on the bottom left of the Gantt Chart page.

The Gantt Chart page's interface can be changed by selecting either *Month, Week* or *Day* to the right of the page.

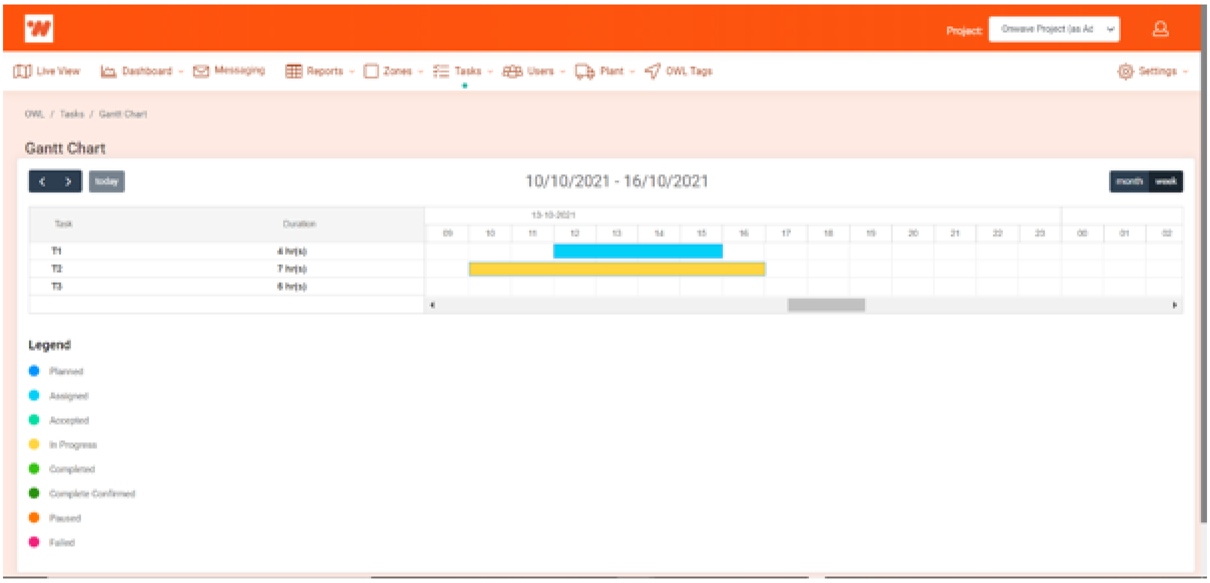


Figure 55: Gantt Chart.

3.6.6 Task Custom Fields

To create Task Custom Fields you can navigate the Task Custom Fields page by using the *Custom Fields* button on the Tasks page or via the Custom Field option under the Task Menu.

This will open the Task Fields Management page, where new Custom Fields can be created and edited.

To create a new field clicking the *Add new* button.

This page will initially display a list of any Custom Fields that you have created with the following information:

- Field Name
- Type
- Actions

To create a new Task Custom Field, select *Add new* and you will be taken to a Task Custom Field creation page where you will need to define the:

- Field Name
- Field Type, which can take several forms:
  - Text,
  - Number,
  - Email addresses,
  - Dates,
  - True/False, and
  - File (or attachments).

Custom Fields that have been added will appear at the bottom of the Task Management page so that they can be added as Tasks are created.

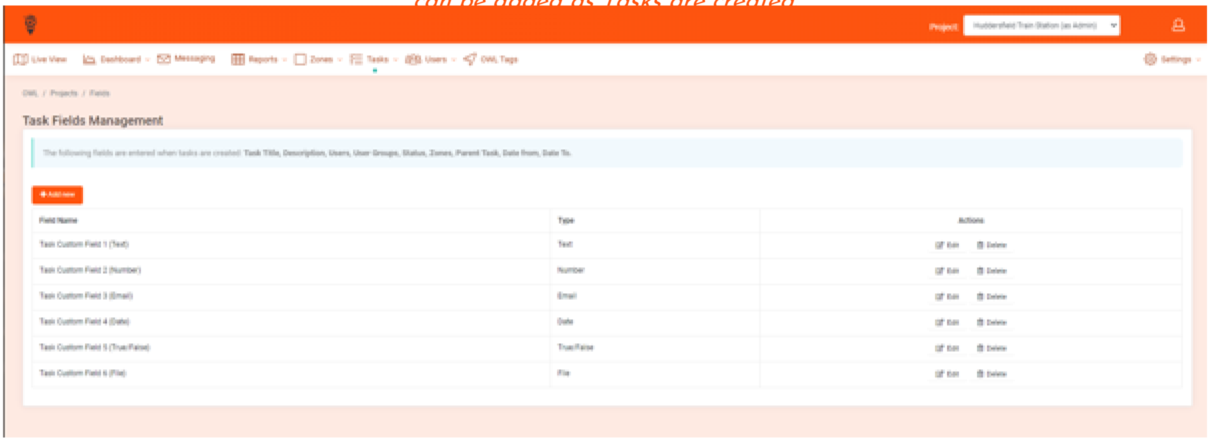


Figure 56: Task Custom Field List View.

Figure 57: New Task Custom Field Added.

4 Communication with field Users

4.1 Messaging

The Messaging feature allows Users to communicate with other Users on the Platform, and is a useful way to cascade information or to collate updates from the field.

On the Messaging page (Figure 65) you are given the option to begin a chat by clicking the *Compose* button.

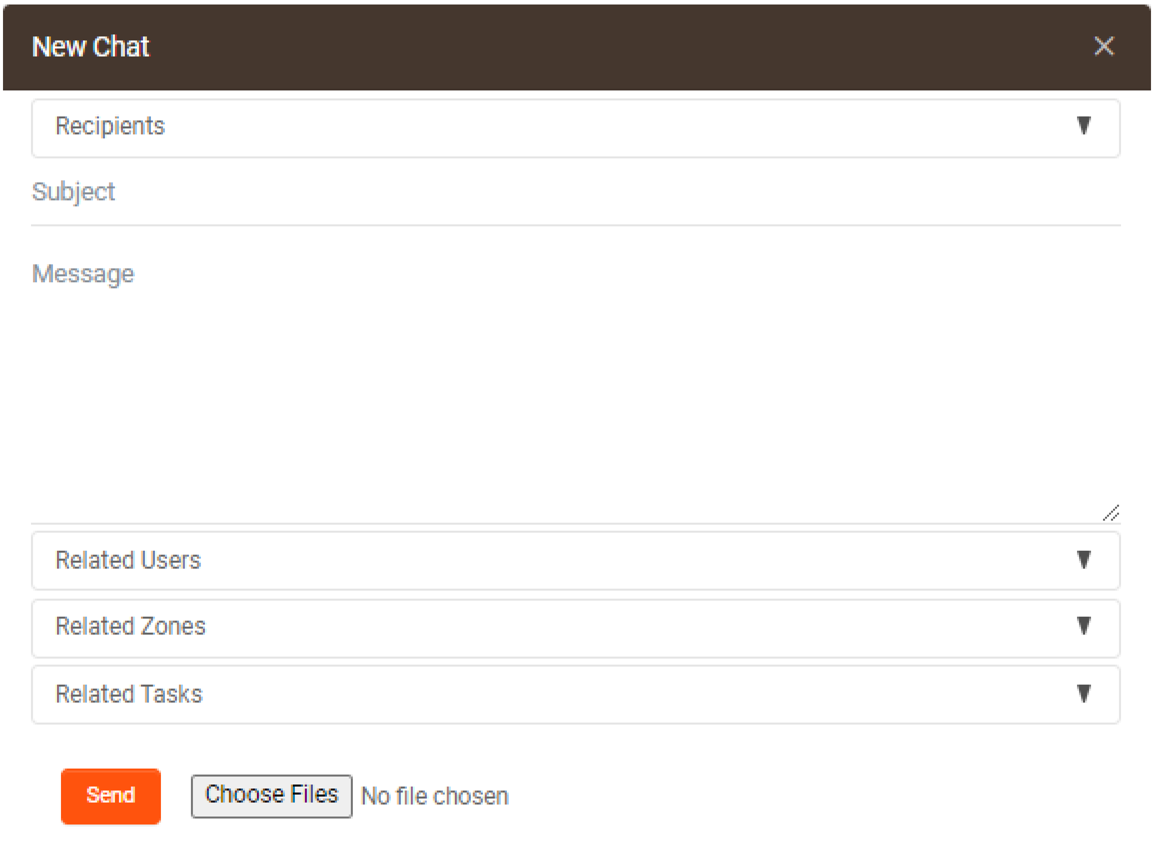


Figure 58: Composing a message.

Messages can include a subject line as well as message content and can be sent with attachments in the same way as traditional email systems.

Messages can be sent to specific Users, but also related to User Groups, Task and Zones. Any message that includes a related a User Group, Task or Zone will be shared with all Users with the appropriate Resource Permissions.

Users can either archive and or "star" messages.

Users can also search for messages with keywords via the *Filter chats* search field.

5 Business intelligence

5.1 Live View

5.1.1 Intro to Live View

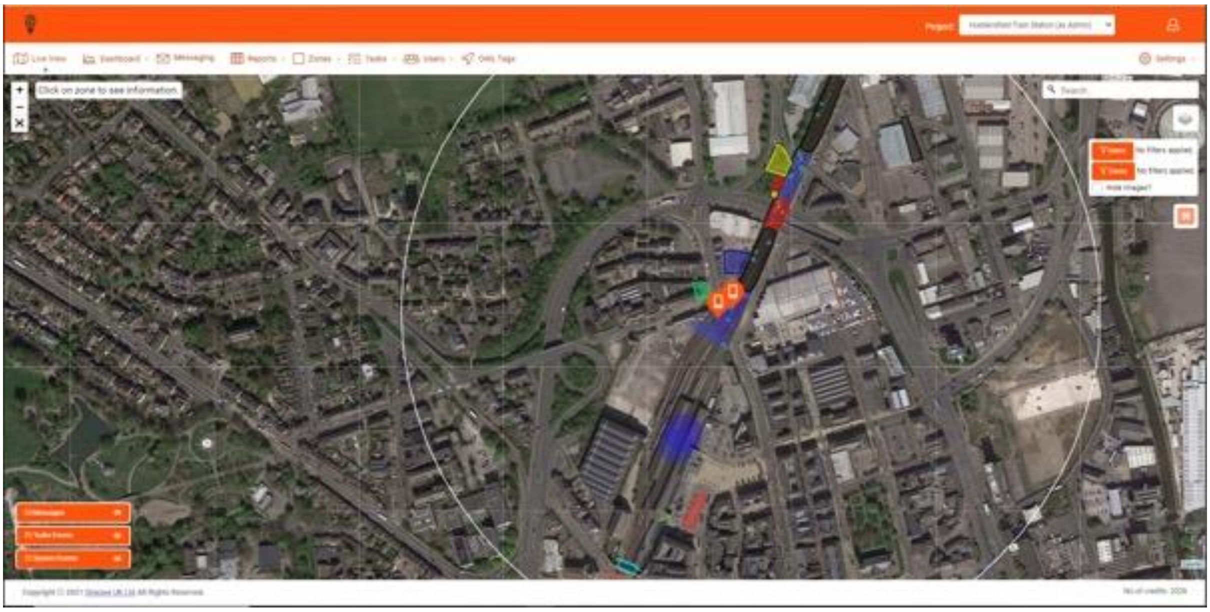


Figure 59: Live View

Live View allows you to view all OWL Users and Plant on your Project, as well as any Zones that have been created and which are active.

By default, Live View will open based on the last location you viewed when logged in to the Platform.

Features of Live View

Search - By using the search field on the Live View page, Users can find a location by typing in the location address or its coordinates.

Map View - By hovering over the layer icon below the search bar on the top right of the map, you can change the map interface of Live View

Map Zoom - In the top left corner on the map there are three white buttons that allow you to zoom in and out on the map, or to make the map full screen. To exit full screen mode simply use the escape button on your PC or Device.

5.1.2 Displaying Zone, User and Plant Information

By clicking on a Zone you have created within the Portal, this will be highlighted, and the following information will be displayed:

- Zone text
- Task with Edit link (only if a Zone is assigned to any Task and the User viewing Live View is assigned to said Task)
- User density (only when the *User density* rule is enabled for the Zone)

By clicking on a User icon, pertinent information related to the User will be displayed:

- Username
- Status (see below)
- Last update time
- Email
- User Group
- Custom Fields

User Icons will automatically be changed based on the State, the timings for these changes are configured within the settings menu

- Online – Status when system is communicating with User/Plant
- Off line – No Location Data received for defined period
- Off Site – User is outside defined Boundary limits
- Logged Out – App User has Logged Out

By clicking on a Plant icon, pertinent information related to the Plant will be displayed. Plant Icons will automatically be changed based on the State, the timings for these changes are configured within the settings menu

- On line
- Off line – No Location Data received
- Off Site – Boundary limits outside

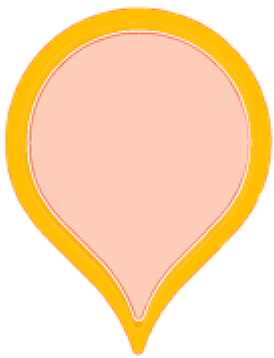


Figure 60: Offline Icon

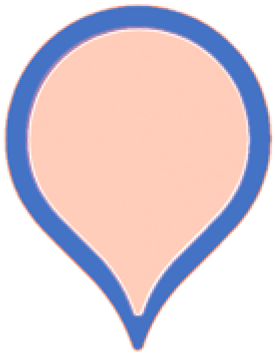


Figure 61: Off Site Icon

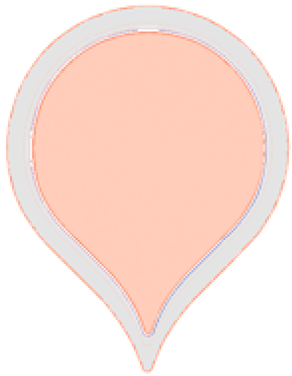


Figure 62: Logged Out Icon

5.1.3 Filters

On the right of the Live View screen you can find options to filter your Live View data.

Filters are provided for:

- Users (via name, email, Group, Custom Fields or Icon Statuses) and
- Zones (via name, Zone text, Zone Groups or Custom Fields).

Project Admins are also able to hide/show any image overlays on the map by ticking the checkbox labelled *Hide images?*

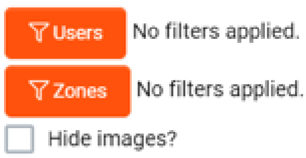


Figure 63: Live View Filter

5.1.4 Notes

Users are able to add Notes on the Live View page using the *Note* text field.

Saved Notes will be displayed for all Project Users on Live View, and may be edited or deleted by any User inside the selected Project (Figure 64).

Figure 64: Notes icon.

5.1.5 Messaging and Event Log visibility

In the bottom left corner of the Live View screen, the following options are available: Messages, Task Events, and System Events.

By clicking on the button you can toggle the visibility of these on the bottom of the Live View page.

Selecting any existing messages on the interface will direct the User to the Messaging section (Figure 65).

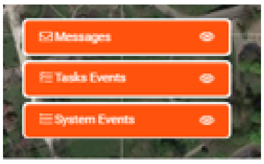


Figure 65: Live View Reports.

5.2 Reports

5.2.1 System Reports

Reports provide predefined criteria to display system data in manageable tabular views to aid with data analysis and interrogation. Figure 66 displays the list of System Reports available.

> **Note:** All reports are exportable (see section 5.2.3).

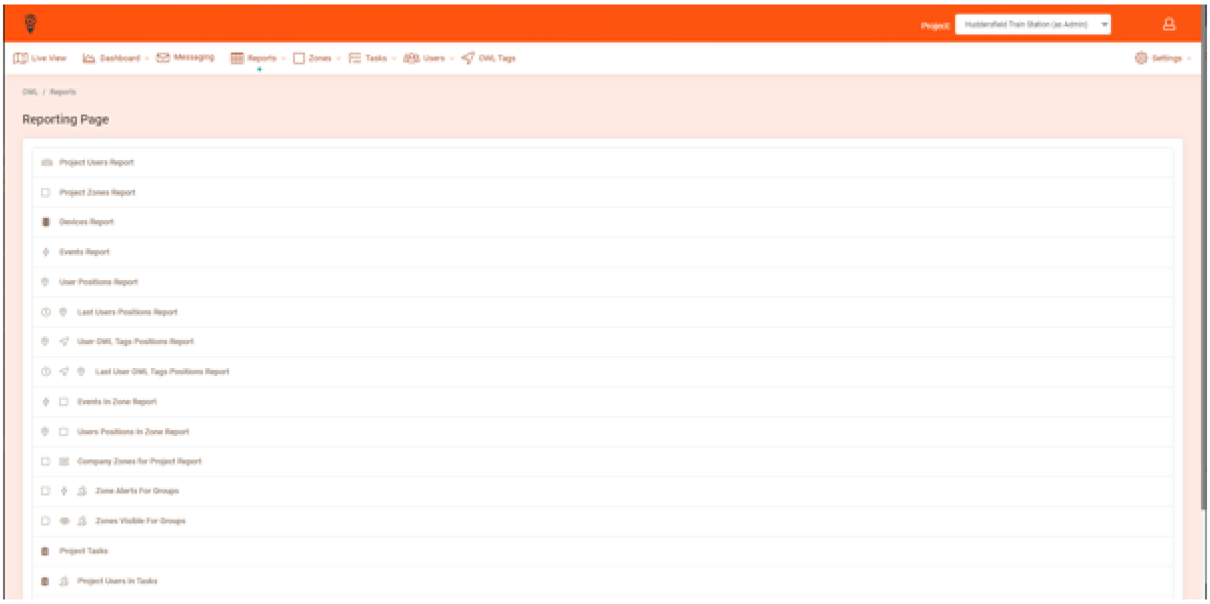


Figure 66: Pre-defined System Reports.

5.2.2 Report Filter and Search

To order the information in a Report Table, click the arrow icons in the header of the column that you would like the data to be sorted by (Figure 67).

The icon will then change to indicate the order of data, either ascending or descending.

If you are looking for a specific item, you can filter a Report Table by typing in the search fields underneath the columns (Figure 67).

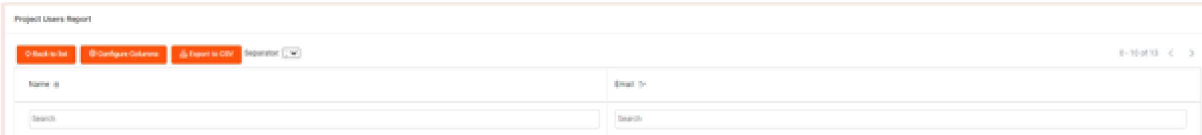


Figure 67: Example report page highlighting filter, search and export functions.

5.2.3 Exporting Reports

To export a Report, select the required Report from the System Reports page.

At the top of the Report Table, select the desired separator and then click the *Export to CSV* button (Figure 67) to download the information into a Microsoft Excel sheet.

5.2.4 System Events

All Alerts triggered by Mobile Project Users are stored on the System Events page.

The following Alert types are stored on System Events (as long as the Zone Action Rule *Log Events* is enabled for the Zone in question):

- *Entering Zone*
- *Leaving Zone*
- *Approaching Zone*

The following Alert types are stored on System Events (as long as the User Action Rule *Log Events* is enabled for the User in question):

- *Fall Detection*
- *SOS Button Pressed*
- *Auto Vigilance Check*
- *No Movement Detected*
- *Entering Exclusion Zone*
- *Mobile Low Battery*
- *Prohibited Zone*

The following Alert types are stored on System Events (as long as the User Action Rule *Log Events* is enabled for Users assigned to OWL Tags):

- *OWL Tag Low Battery*
- *Entering Exclusion Zone*

Alert types which do not require additional configuration on the Web or Mobile Apps are stored on the System Events page upon being triggered by a Mobile User:

- *App started* (the last time a Mobile User logged in/launched the App)
- *App closed* (the last time a Mobile User logged out/closed the App)
- *GPS turned off* (if GPS connection is lost or turned off on a mobile device)
- *GPS turned on* (if GPS connection is enabled on a mobile device)

Events may be filtered on the System Events page by using the dropdown menus below the User and Alert Type columns. Events may also be filtered in ascending or descending order by using the arrow icons found on each column.

Notes may be added for Events stored on the System Events page and will be displayed for all Project User with access to the System Events page.

5.2.5 Task Events

If the Task Action Rule *Log Events* is enabled, any instances of that Task changing status are stored on the Task Events page (found under the *Reports* dropdown on the white navigation bar).

Task Events are displayed in tabular form and may be filtered using the dropdown menus found under the *Task*, *Old Status*, *New Status*, and User columns. Events may also be filtered in ascending or descending order using the arrow icons found on each column.

5.2.6 Location Player

The Location Player page gives Project Admins the ability to access the historical location data of any User by allowing Admins to "rewind" and analyse past asset movements. Navigate to the Location History Player page (which can be found under the *Reports* button on the white navigation menu) and input the relevant Users as well as the timeframe you wish to analyse. Apply filters if needed by clicking the orange *Apply filters* button, and the press *Play* (the Location Player can be paused at any time). Project Admins can also choose from multiple playback speed options: *x1, x10, x50, x100* and *x200*.

The Location History of the User(s) will be represented by a trail on the map interface (Figure 68).

If several Users are selected for the Location Player, the Location History trail of each user will be shown in different colours.

If there is no data from the User to be replayed, an error message will be displayed if *Apply filters* is clicked (Figure 69).

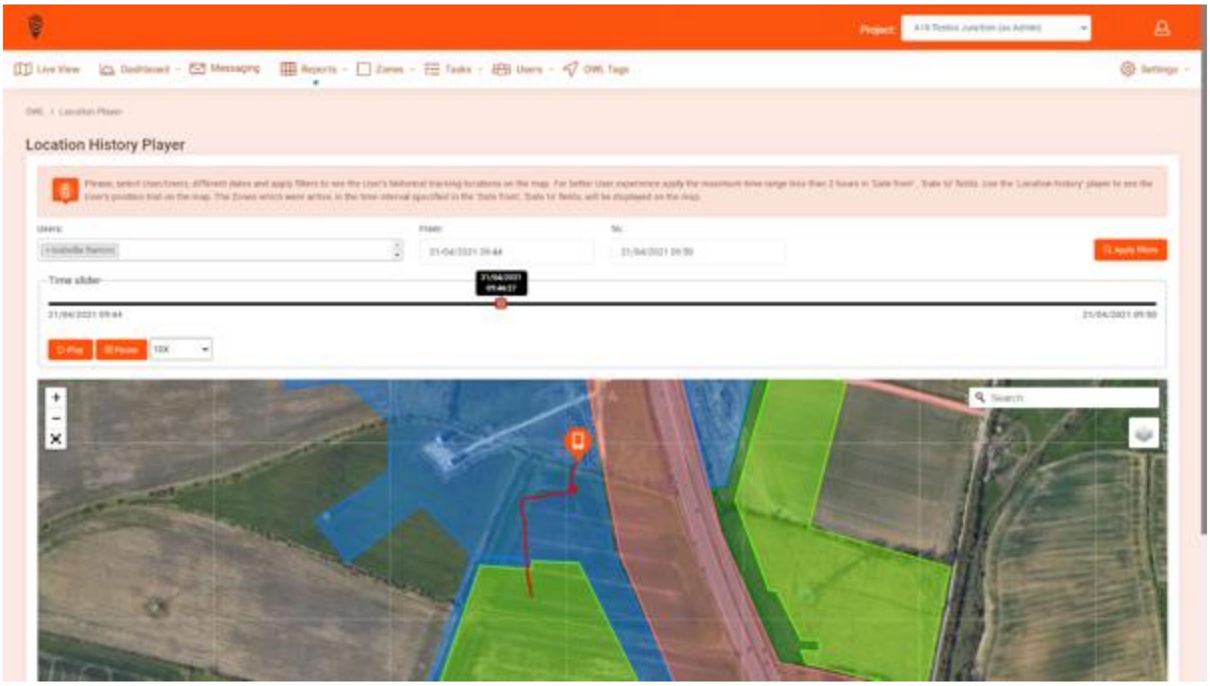


Figure 68: Location Player Location Trail.

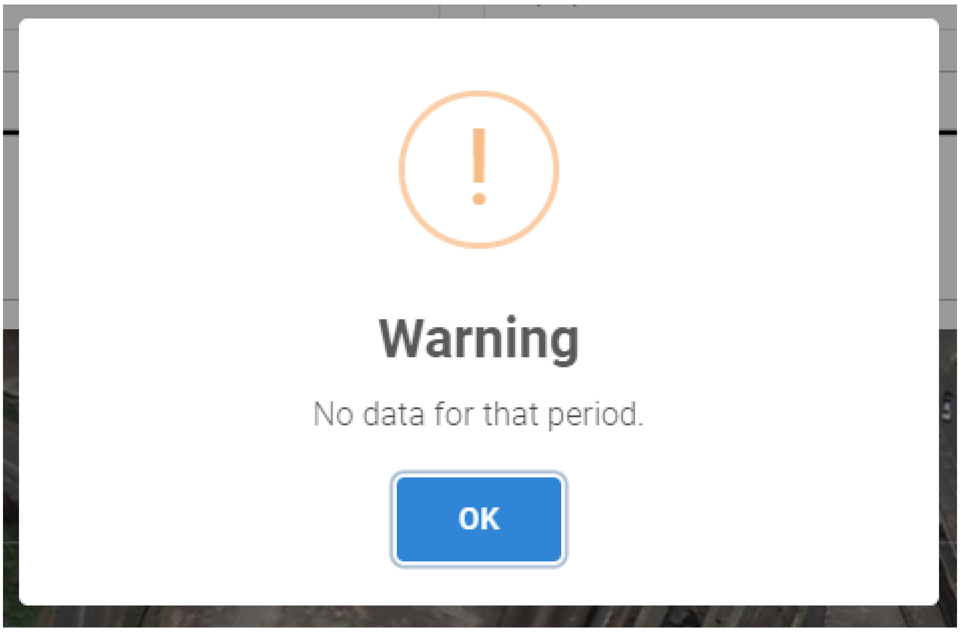


Figure 69: Location Player search with no data.

5.3 Dashboard

Dashboards can be configured by individual Users to display information and data gathered by OWL. The information can be displayed in the following formats:

- Tabular
- Pie chart
- Bar chart

- Polar area
- Radar
- Call out boxes

Users can create multiple Dashboards, so Users can have separate Dashboards for individual projects as well as one Dashboard to collectively all Project data.

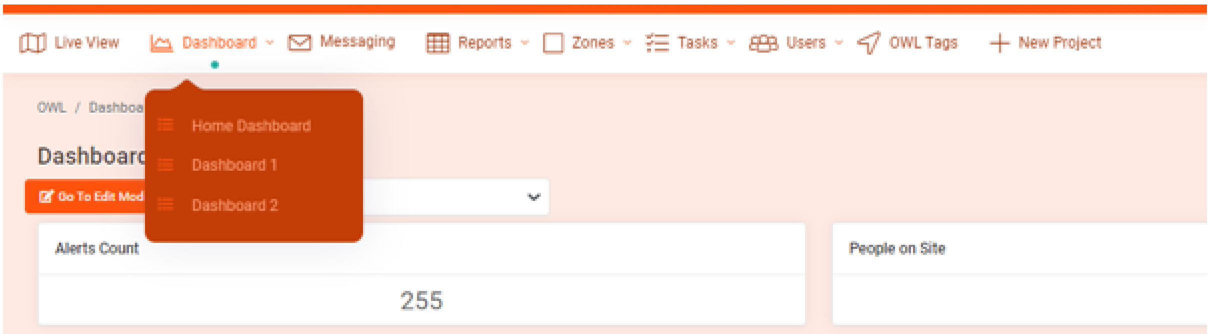


Figure 70: Dashboard selection.

5.3.1 Adding and editing tiles

To add or edit Dashboards, click *Go to Edit Mode* (Figure 72). Here you can add or remove rows and adjust the information as it is presented in the Dashboard.

To create a Dashboard, click *Add Row* and select the number of columns, then click *Add Chart* in the desired column and select the Report information from the dropdown menu. Depending on the report information selected, additional fields may require completing.

Once all changes have been made click *Go to View Mode* (Figure 71).

To add or edit Dashboards, click *Go to Edit Mode* (Figure 72). Here you can add or remove rows and directly edit the information in the Dashboard.

To create a Dashboard, click *Add row* and select the appropriate number of columns. Then click *Add Chart* in a column and select the desired Report information from the dropdown menu. Depending on the Report information selected, additional fields may require completing.

Once all changes have been made click *Go to View Mode*.

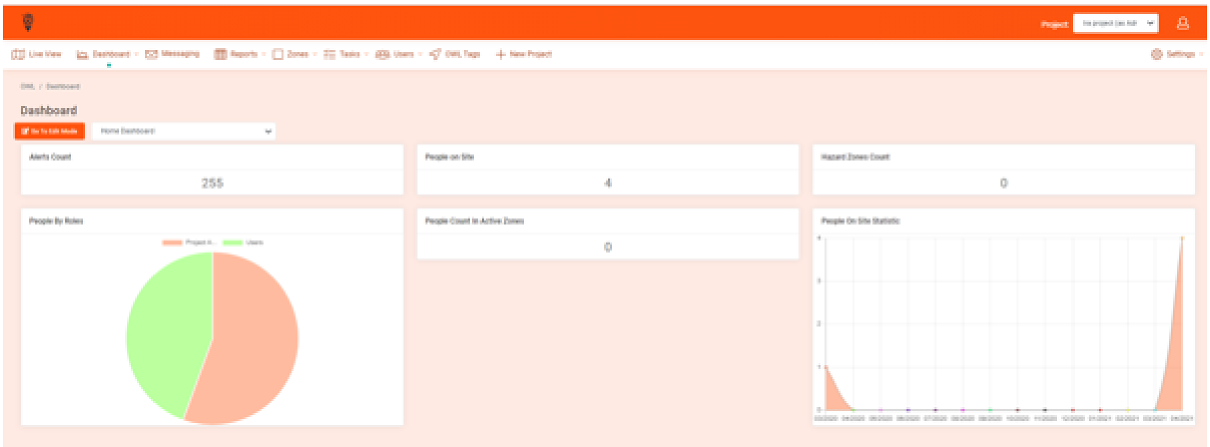


Figure 71: Dashboard in View Mode.

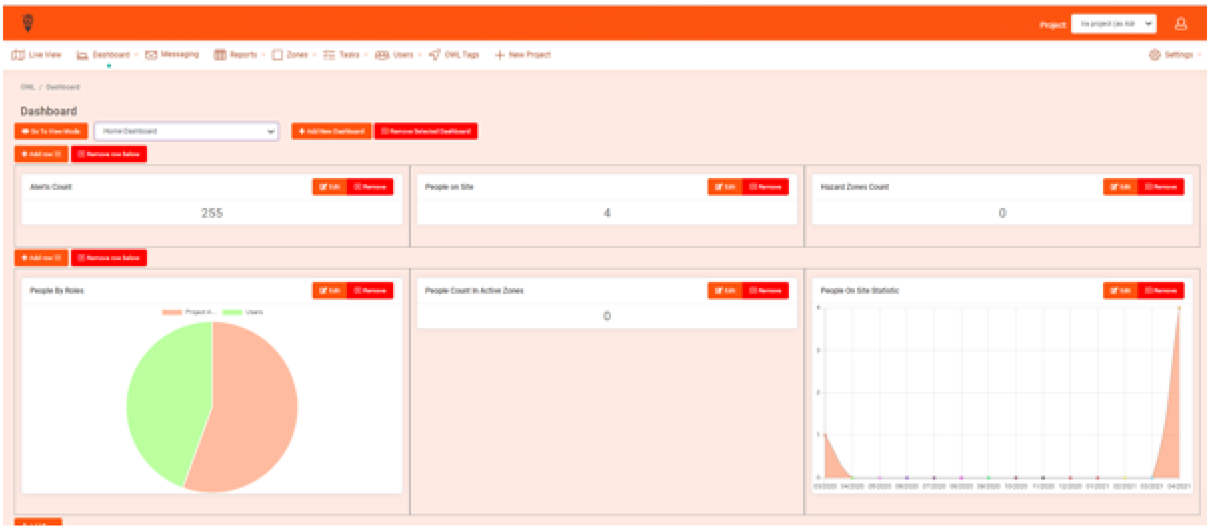


Figure 72: Dashboard in Edit Mode.

5.4 Customisation and Enhanced Settings

5.4.1 Setting preferences

The Settings dropdown menu provides access to:

- Layout Settings (section **Error! Reference source not found.**)
- Image Overlay
- Licensing
- API
- Audit Trail
- Configuration

Layout Settings allow you to alter the following preferences (**Error! Reference source not found.**). Each sub-setting has toggles that can be switched on and off, or disabled entirely:

- App Layout
- Mobile Menu
- Accessibility
- Global Modifications
- Theme Colours

> **Note:** If you press the *Reset Settings* button XXX, while the *Factory Reset* button XXX.

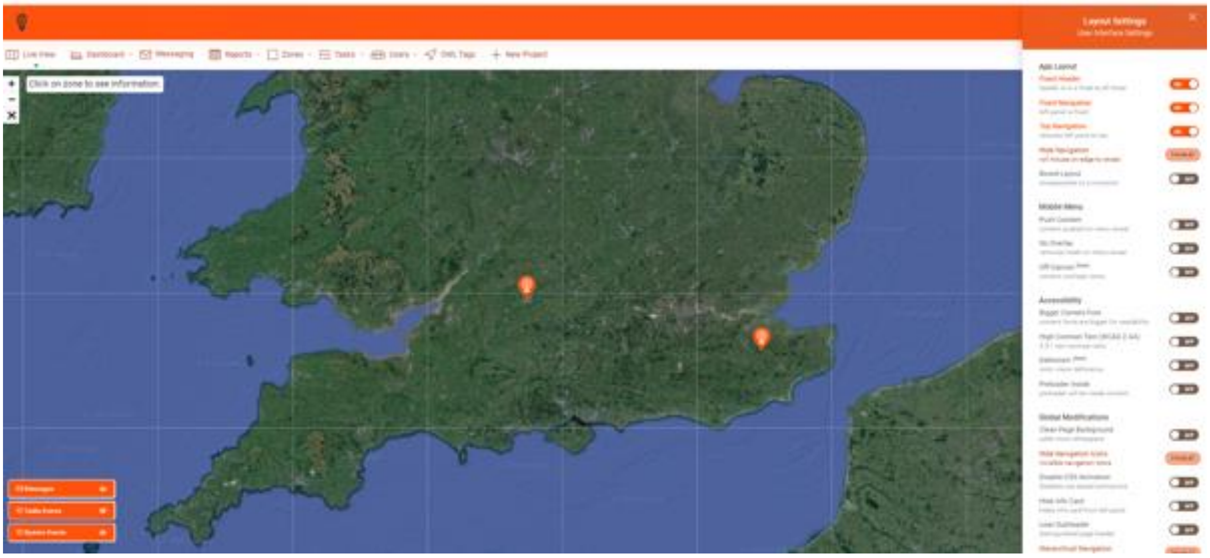


Figure 73: Layout Setting menu options.

5.4.2 Layout Settings

Layout Settings (Figure 74) can be found under the *Settings* button to the right. Layout Settings can be changed by each User.

Each sub-setting has toggles that can be switched on or off, or disabled entirely. The settings include the following categories:

- App Layout
- Mobile Menu
- Accessibility
- Global Modifications
- Theme Colours (default colour is orange)

> **Note:** If you press the *Reset Settings* button XXX, while the *Factory Reset* button

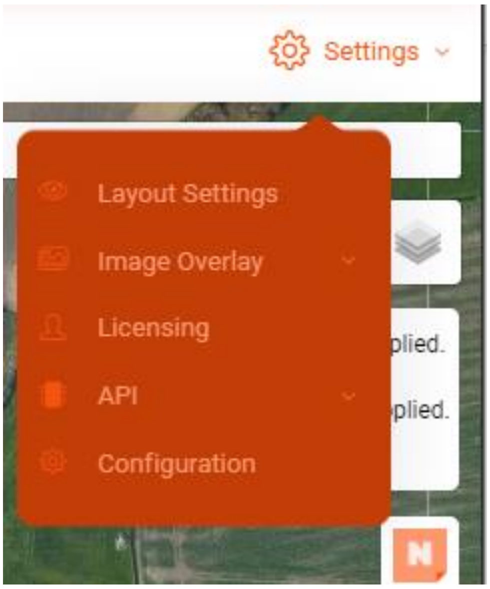


Figure 74: Layout Setting menu options.

5.4.3 Image Overlay

The Image Overlay List View page is a table view of the overlay images that have been added to the Project (Figure 75).

> **Note:** You can search the List View by typing in a key word in the appropriate column.

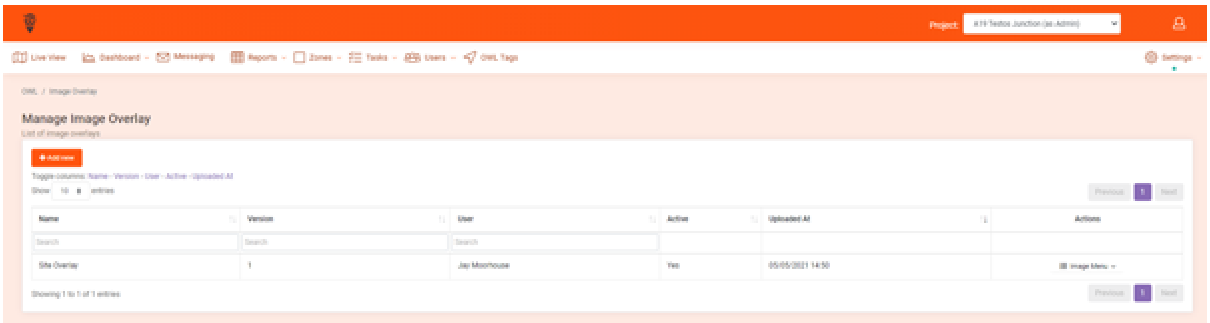


Figure 75: Image Overlay, list view.

To add an image overlay select *Add New*, either via the *List View* page or via *the Settings* button dropdown, and complete the information fields shown in Figure 74.

> **Note:** If the *Is Active?* option is unticked, it will no longer be displayed to Users on the Project Live View.

> **Note:** Opacity default is 50%.

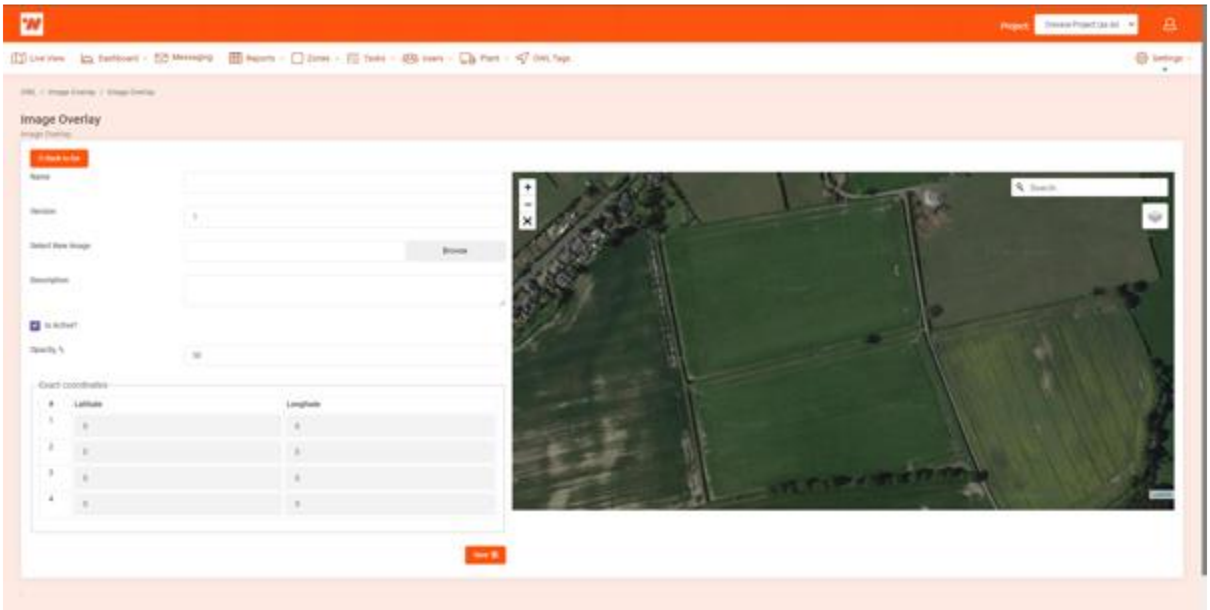


Figure 76: Add New Image Overlay screen.

To add an image, click *Browse* and select the overlay image. A popup will appear stating: *Please click on map to start placing the image!* Select OK.

Click 2 points on the map to add the image. The Image will then be made visible, and you can adjust the points of the image either by dragging them on the map or by adding the Latitude and Longitude coordinates (Figure 77). The aspect ratio of the image is now locked so that the image will not be distorted.

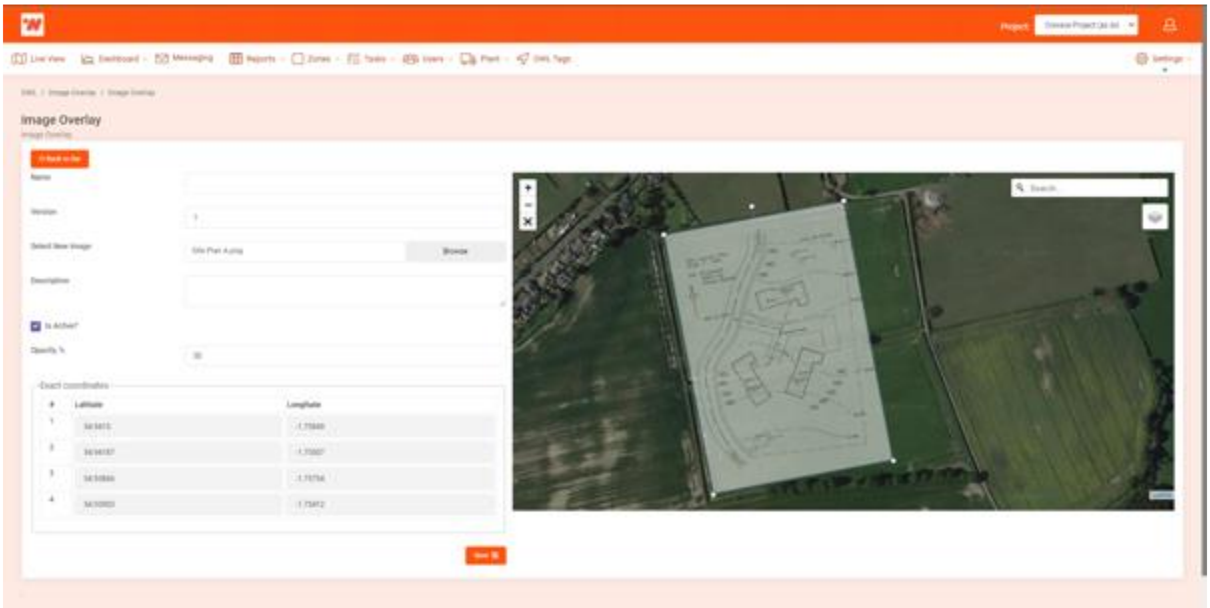


Figure 77: Image Overlay addition and adjustment.

Note: If the wrong image is selected, simply click Browse again and select the correct image.

Once complete click *Save,* and the new Image Overlay will appear on the List View.

From the Image Menu in the *Actions* column you can download, edit or delete the image (Figure 78).

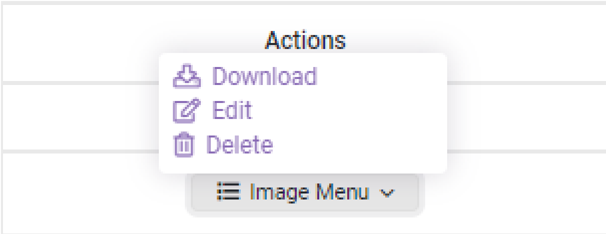
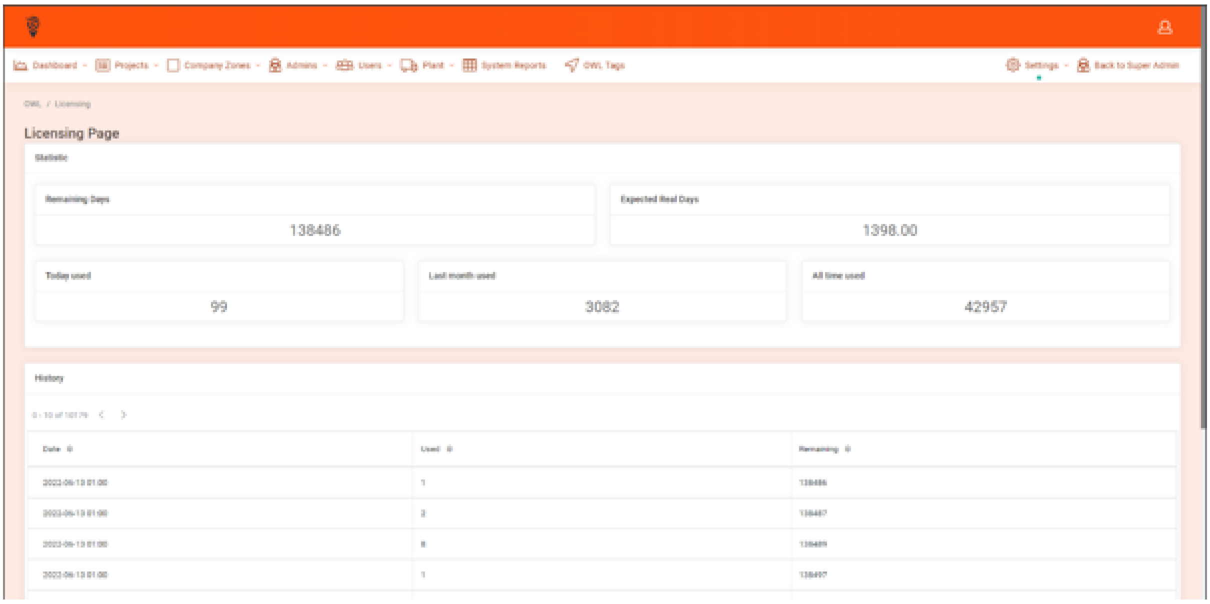


Figure 78: Image Overlay List View menu.

5.4.4 Licensing



The Licensing Page, found under *Settings,* allows you to monitor and manage OWL license days at a Project level.

The Statistic table provides the following information:

- Remaining Days – the number of license user days left inside the project
- Today User – number of licence user days used in the last 24 hours
- Expected Real Days – this provides a calculation how many days are left to use the remaining licences that are available for the Project. The calculation is based on the total number of credits remaining and credits used for the previous day.
- Last Month Used
- All Time Used

Project Admins can schedule licenses for return by selecting the *Schedule Licenses For Return* button and inserting the number of days. These licenses will be returned to the Company by midnight of the following day.

The History table displays daily statistics regarding the number of licenses used and remaining.

On the footer of the Portal site, the number of remaining credits are always displayed. The number of credits are highlighted in green (if the number of User Days is over 90), amber (if the number of User Days is between 31-89), or red (if the number of User Days is below 30).

5.4.5 Configuration

Company Admin is the only level that can alter this setting and changes will be applied to all Project Users.

Mobile Location Reporting Interval enables the Project Admin to set and amend the reporting interval for all mobile GPS signals sent from the mobile devices of Users.

Project Site Perimeter gives Project Admins the ability to set a single Zone as the site perimeter for the entire Project. This can be achieved by selecting a Project Zone from the dropdown menu and clicking *Save*. This gives Project Admins the ability to create Reports and Graphs based on User data. The Dashboard chart labelled *Time spent in Site perimeter* displays the amount of time spent by Users inside the site perimeter within different periods (either *day, week, month, year* or *all time*). The System Report labelled *Time spent in Zone* can also display this same information in tabular view.

Accuracy Parameters are set for the entire Project by the Project Admin. These values define the best to worst accuracy:

- Green
- Amber
- Red

The accuracy alert value is set so that the Project Admin can dictate when the User will receive a sound alert with a push notification to the mobile, to let them know that their accuracy is equal to or below the value set. Read more about this under 'Accuracy Notification Configuration' Section 5.4.6.

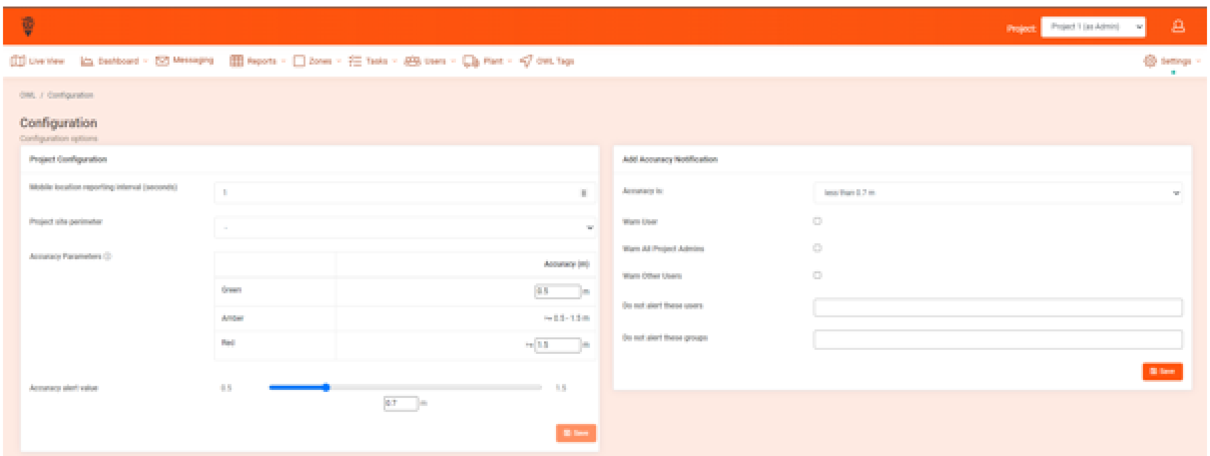


Figure 79: Account Configuration settings.

5.4.6 Adding an Accuracy Notification

The Project Admin is able to configure notifications for meters being both higher and lower than the set Accuracy Alert Value.

For both choices, there will be the below options:

- Warn User
- Warn All Project Admins
- Warn Other Users
- Do Not Alert these Users
- Do Not Alert these Groups

5.4.7 Add New Project

As long as a Company Admin has enabled the Permission *Create New Project?* for a Project Admin's account, the Project Admin will be able to see the additional module *Add New Project* on the white navigation bar.

To create a new Project, select the *Add New Project* tab, fill out the required fields and assign Licenses to the project. After submitting, the new Project will appear in the Project dropdown menu to the right of the orange navigation bar.

6 Contact Information

6.1.1 Contacts

Team	Email	Call
OWL		0203 434 5000
Sales Department	sales@owl-bi.com	0203 434 5001
Marketing Department	marketing@owl-bi.com	
Support Department	support@owl-bi.com	0203 434 5002
Accounts Department		0203 434 5003

6.1.2 Office

4 Abbey Wood Road
Kings Hill
West Malling
ME19 4AB

6.1.3 Social media

LinkedIn	@Onwave
Twitter	@onwaveUK
Instagram	@onwaveUK

7 Additional Information

7.1.1 Confidentiality Statement

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7.1.3 Change Control

Rev	Change Description	Created by	Approved By	Date Created	OWL Version
1.0	Draft	Isabella Ramiro	N/A	11/12/2019	0.1
1.2	Review	Isabella Ramiro	N/A		0.1
1.3	Addition and revision of tracked changes	Jade Le Gray-Wise	N/A		0.1
1.4	Format update and comment update	Jade Le Gray-Wise	N/A	25/03/2020	0.2
1.5	Review and update	Jade Le Gray-Wise	N/A	07/04/2020	0.3
3.3	Reformat and update to new version of OWL	Jade Le Gray-Wise	N/A	04/06/2021	1.0

7.1.4 Copyright

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