



JESI User Guide

User Guide — Last update: 11 July 2022

JESI Management Solutions

Table of Contents

1. What's New with JESI?	3
1.1. Using WhatsApp for Existing JESI Profiles	4
1.2. Using WhatsApp for New JESI Profiles	6
2. Introduction	10
2.1. Permission and Roles	11
2.1.1. Team Member Role	14
2.1.2. Monitor Role	15
2.1.3. Manager Role	16
2.1.4. Administor Role	17
3. Getting Started	18
3.1. Activate JESI Profile	19
3.2. Logging into JESI	23
3.2.1. Logging into JESI with Single Sign-On	25
3.2.2. Why do I have to keep Logging In?	32
3.3. Setting up Mobile Device	33
3.4. Forgotten or Reset Password	34
3.5. My Profile	39
3.5.1. How to set Default Team	40
3.5.2. Switching Mobile Numbers	41
3.5.3. Adding an Activity to a Calendar	42
4. Managing An Activity	43
4.1. Creating a New Journey	44
4.2. Creating an Activity using a Travel Itinerary	52
4.3. Creating a Working From Home Activity	54
4.4. Creating a Working On-Site Activity	59
4.5. Creating a Lone Worker Activity	61
4.6. My Favourites	63
4.7. Amending an Activity	65
4.8. Reactivate a Cancelled Activity	67
4.9. Checking-In	68
4.10. GPS Confirmation Check-In	70
4.10.1. Enable Location Services on iOS	73
4.11. Reporting an Incident	76
4.12. Completing a Wellbeing Check	80
4.13. Completing a Risk Assessment (optional)	86
4.13.1. Completing a Risk Assessment on behalf of a User	88
4.14. Viewing History	89
5. Managing an Escalation	90
5.1. When a Missed Check-In Escalation Occurs	91
5.2. When an Incident Occurs	92
5.3. How to add Notes	95

6. Managing a User's Activity	97
6.1. Creating an Activity for a User with Route Planner	98
6.2. Creating a User's Activity with a Travel Itinerary.....	104
6.3. Amending a User Activity	105
6.4. How to add notes for another User	106
6.5. How to Check-In a User	108
6.6. Managing a Risk Assessment on behalf of a User	109
6.7. Reviewing a Wellbeing Check and Permissions	111
7. Risk Assessments (RA Optional)	113
7.1. How to Add a Risk Assessment.....	114
7.2. How to Deactivate a Risk Assessment	116
7.3. Basic Trip Risk Assessment	118
7.3.1. Business Rules Basic Trip Risk Assessment.....	120
7.4. Intermediate Trip Risk Assessment	121
7.4.1. How to Review an Intermediate Trip Risk Assessment.....	122
7.4.2. Business Rules Intermediate Trip Risk Assessment.....	123
7.5. Advanced Trip Risk Assessment	124
7.5.1. How to Review an Advanced Trip Risk Assessment.....	125
7.5.2. Business Rules Advanced Trip Risk Assessment.....	129
7.6. Completing the Work From Home Risk Assessment.....	130
7.6.1. Work from Home Risk Assessment Questions	132
7.6.2. Working From Home Risk Assessment FAQ's.....	133
8. Viewing Users Data	134
8.1. How to Search for User Profiles & Profile Status	135
8.2. User Activity Dashboard and Definitions.....	141
8.2.1. User Activity Dashboard Icons	142
8.3. User Map	144
8.4. User Map View Filters	147
8.5. How to view Team Escalations	150
8.6. User Activity Search Options.....	151
8.7. Viewing Activity Details	152
9. Accessing Reports	154
9.1. System Statistics Search Options.....	155
9.2. Accessing Escalation Data	156
9.3. Exporting User Data	157
10. Managing User Profiles	158
10.1. Permission Levels	159
10.2. Creating a New User	162
10.3. User Profile Status	164
10.4. Amending a User Profile.....	168
10.5. Adding Additional Mobile Numbers.....	169
10.6. Adding a User to a Team.....	170
10.7. Adding a User as an Escalation Contact.....	172

10.8. Bulk Removal and Replacement of an Escalation Contact from a Team	174
11. Manage Teams	176
11.1. Creating a New Team.....	177
11.2. Deactivating a Team	179
11.3. Amending a Team	181
11.4. Team Profile Status	183
12. Managing Custom Locations	185
12.1. Creating a Custom Location	186
13. Integrations	190
13.1. How to Generate an API Key.....	191
13.2. How to Install the Power BI Application Template	195
13.3. IVMS Integration	205
13.3.1. GEOTAB.....	207
13.4. Single Sign-On.....	208
14. Troubleshooting	211
14.1. Troubleshooting Browser Connectivity.....	212
14.2. Clearing Google Chrome Cookies and Cache	213
15. FAQ	214
15.1. One-Time Secret.....	215
16. JESI Training Centre	216

1. What's New with JESI?

JESI via WhatsApp

Receive JESI notifications through WhatsApp!

We are always looking at ways in which we can assist all our JESI Users to have a great experience in using the JESI software, no matter where in the world you may be located. There are circumstances in some locations around the world where SMS's struggle to be delivered through the in-country local telco network which has been a concern, this is why we are very excited to now have the ability to activate profiles and check-in through WhatsApp.

To start using WhatsApp for **existing** users, click here: [WhatsApp for existing users](#)

To start using WhatsApp for **new** users, click here: [WhatsApp for new users](#)

Introduction of Single Sign-On.

JESI Company Accounts now have the opportunity to have Single Sign-On activated.

Single Sign-On (SSO) in enterprise refers to the ability for employees to log in just one time with one set of credentials to get access to all corporate applications, websites, and data for which they have permission. SSO solves key problems for the business by providing: Greater security and compliance.

To learn more about Single Sign-On (SSO), click here: [Single Sign-On Configuration](#)

Introduction JESI Power BI Integration.

JESI Company Accounts now have the ability to connect their JESI Data using OData to Power BI

JESI now has a Power BI Template that allows you to connect to your JESI Data using OData. This allows you to create your own custom, interactive reports and dashboards using your JESI Data.

To Learn more about producing custom JESI reports using Power BI, click here: [Power BI and JESI](#)

Please reach out to support@jesims.com.au to discuss how any of these new features can be activated.

1.1. Using WhatsApp for Existing JESI Profiles

To start using WhatsApp on a Existing JESI user profile, please follow the guide below:

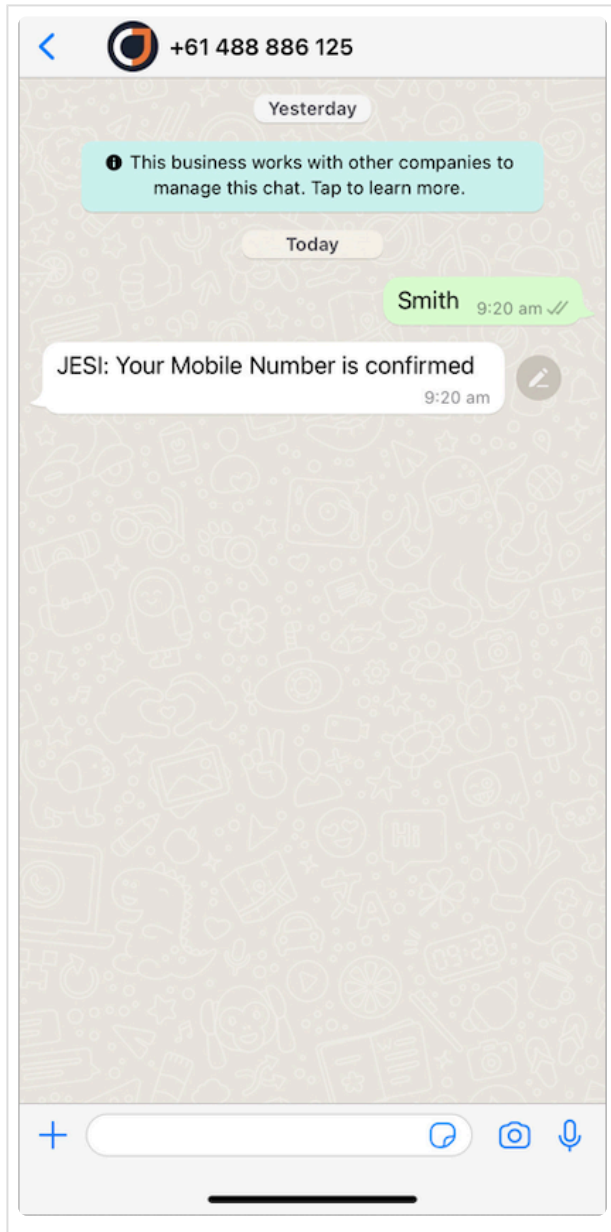
Requirements:

- JESI Client Company Account will need to have the this feature activated
 - Email support@jesi.io to have this feature enabled for your JESI Company Account
- User must have WhatsApp installed on their mobile device – this can be downloaded from your phone's App store
 - For Android Users: [Download WhatsApp on Android devices](#)
 - For iPhone Users: [Download WhatsApp on iPhone devices](#)

Instructions

1. Start a chat with JESI WhatsApp here: <https://jesi.io/whatsapp-login/>
2. Send your surname to the JESI WhatsApp chat

You will receive a confirmation that your mobile number has been confirmed. After this confirmation, all future notifications will come from WhatsApp



You will now receive all future communications from JESI in WhatsApp, if you have any questions regarding WhatsApp and how to set it up, please email support@jesi.io.

Note: To revert back to SMS notifications / reminders this will need to be actioned by the JESI Support Team: email support@jesi.io or call 1800 491 746.

You will receive all communications from JESI in WhatsApp, if you have any questions regarding WhatsApp and how to set it up, please email support@jesi.io or call 1800 491 746

1.2. Using WhatsApp for New JESI Profiles

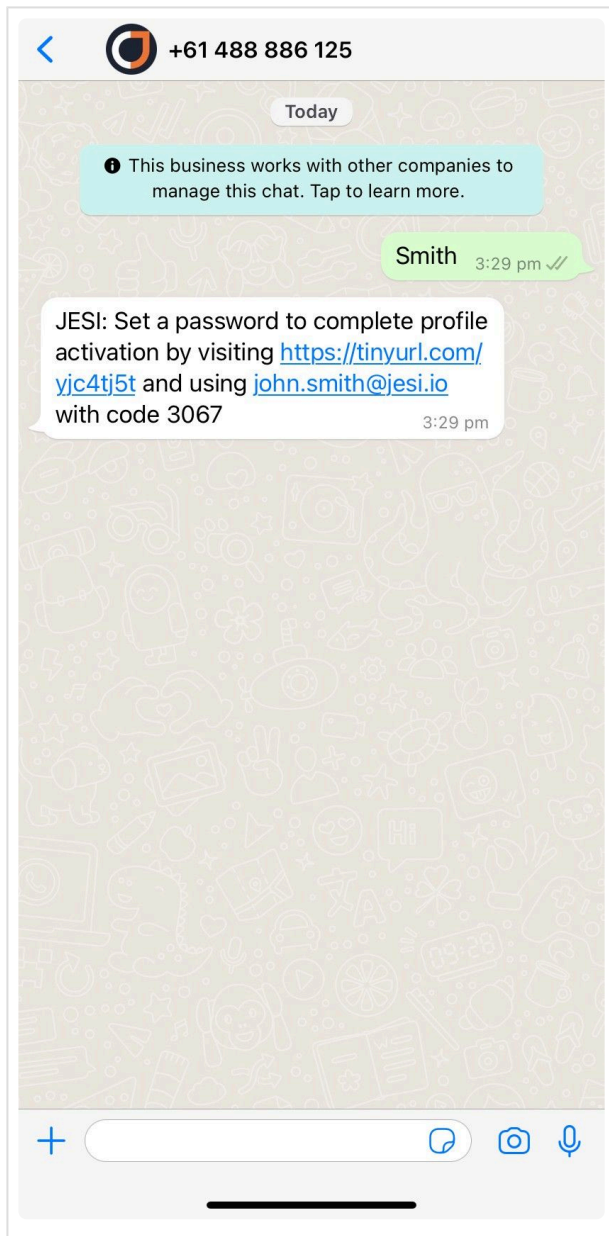
To start using WhatsApp on a Existing JESI user profile, please follow the guide below:

Requirements:

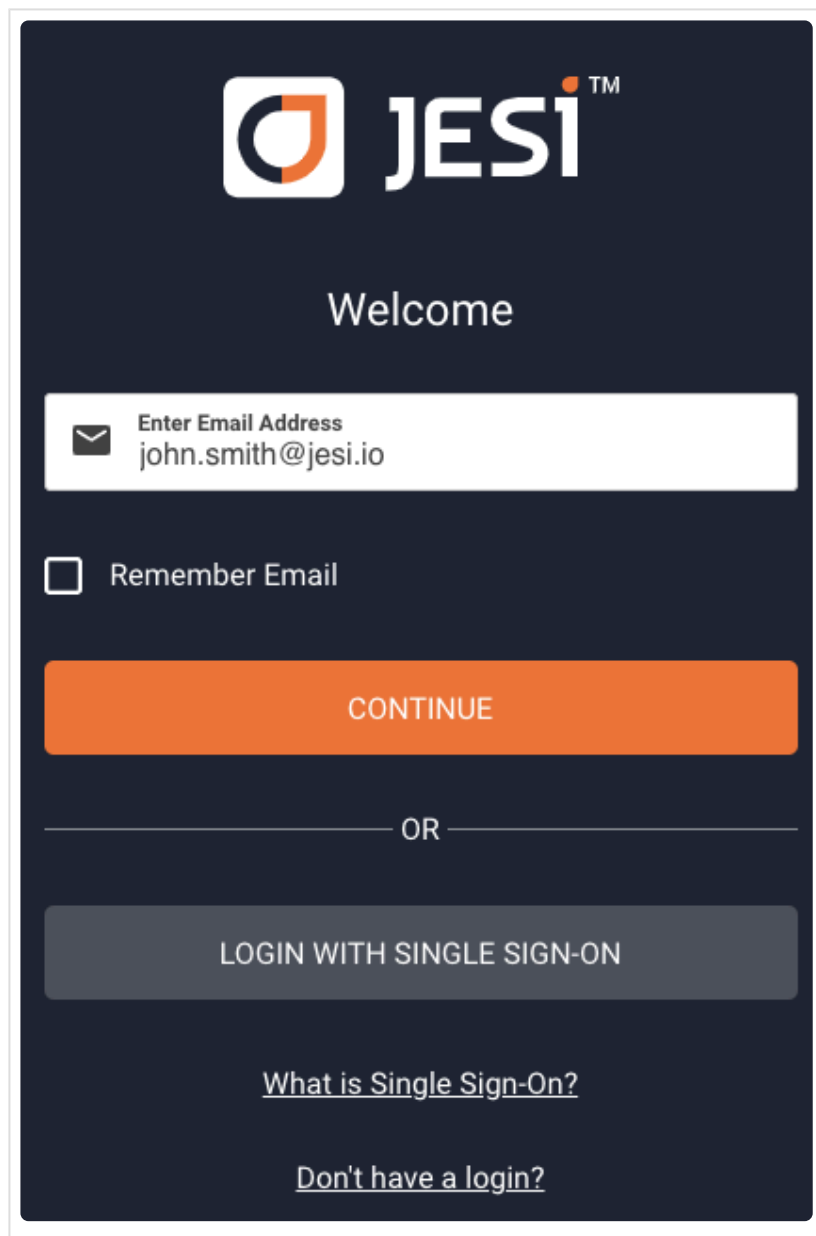
- JESI Client Company Account will need to have the this feature activated
 - Email support@jesi.io to have this feature enabled for your JESI Company Account
- User must have WhatsApp installed on their mobile device – this can be downloaded from your phone's App store
 - For Android Users: [Download WhatsApp on Android devices](#)
 - For iPhone Users: [Download WhatsApp on iPhone devices](#)

Instructions

1. Start a chat with JESI WhatsApp here: <https://jesi.io/whatsapp-login/>
2. Send your surname to the JESI WhatsApp chat
3. You will be provided with a 4 digit security code after you provide your surname
 - You will receive a security code after sending surname



4. Either click the link in the WhatsApp message or navigate in a web browser to <https://app.jesi.io>
5. In the login credentials, enter your email address and click continue

The image shows a login interface for JESI. At the top is the JESI logo, which consists of a stylized 'J' in a square followed by the text 'JESI' with a trademark symbol. Below the logo is the word 'Welcome'. There is a white input field for an email address with a small envelope icon on the left. The placeholder text 'Enter Email Address' is above the text 'john.smith@jesi.io'. Below the input field is a checkbox labeled 'Remember Email'. Underneath is a large orange button with the text 'CONTINUE'. Below the button is a horizontal line with the word 'OR' in the center. Below the line is a grey button with the text 'LOGIN WITH SINGLE SIGN-ON'. At the bottom are two links: 'What is Single Sign-On?' and 'Don't have a login?'.

JESI™

Welcome

Enter Email Address
john.smith@jesi.io

☐ Remember Email

CONTINUE

OR

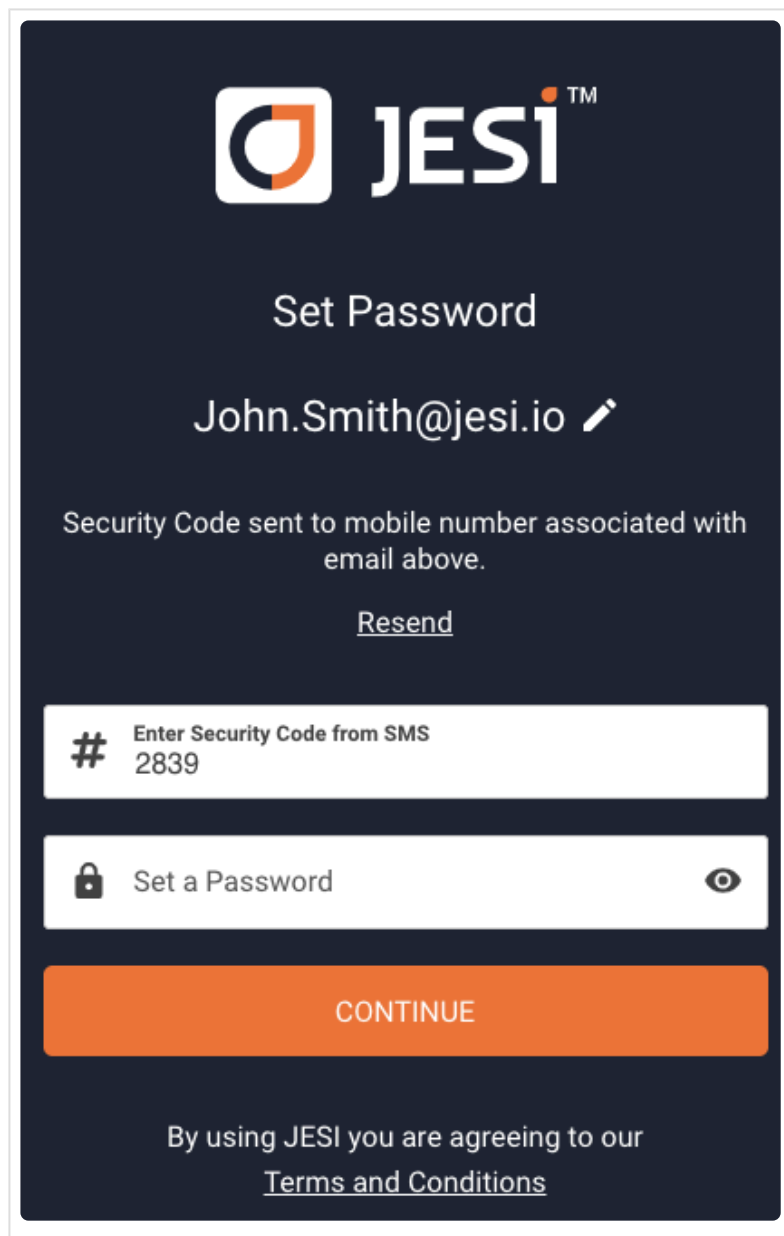
LOGIN WITH SINGLE SIGN-ON

[What is Single Sign-On?](#)

[Don't have a login?](#)

At this stage you will be creating a new password, please use the security code from the WhatsApp message

- Enter the security code from the WhatsApp message
- Create a new password from the next box



The image shows a mobile application screen for setting a password. At the top is the JESI logo, which consists of a stylized 'J' in a square followed by the text 'JESI' with a trademark symbol. Below the logo, the text 'Set Password' is centered. Underneath, the email address 'John.Smith@jesi.io' is displayed with a small edit icon to its right. A message states: 'Security Code sent to mobile number associated with email above.' Below this is a 'Resend' link. There are two input fields: the first is labeled '# Enter Security Code from SMS' and contains the text '2839'; the second is labeled 'Set a Password' with a lock icon on the left and an eye icon on the right. Below the input fields is a large orange button labeled 'CONTINUE'. At the bottom, there is a line of text: 'By using JESI you are agreeing to our' followed by a link 'Terms and Conditions'.

JESI™

Set Password

John.Smith@jesi.io ✎

Security Code sent to mobile number associated with email above.

[Resend](#)

Enter Security Code from SMS
2839

🔒 Set a Password 🔍

CONTINUE

By using JESI you are agreeing to our [Terms and Conditions](#)

After you have provided the security code and created a new password, click continue to jump into JESI

Note:

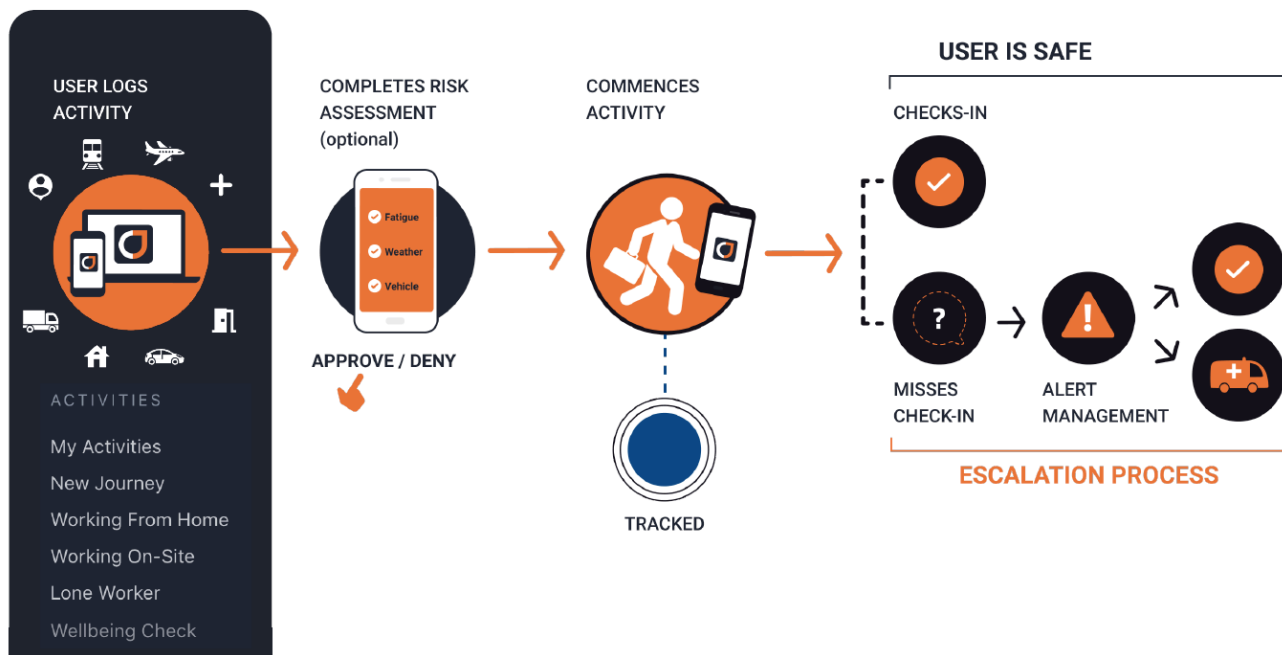
You will receive all communications from JESI in WhatsApp, if you have any questions regarding WhatsApp and how to set it up, please email support@jesi.io or call 1800 491 746

2. Introduction

Thank you for selecting JESI as your Remote Worker management software solution. JESI will support your business to effectively manage the risks associated with your workforce (travelling or not), giving you and your workforce peace of mind.

By now, you and others in your team will have had the opportunity to experience just how easy-to-use our software is, however as we continue to release additional features it is important that all our JESI Users can easily access the same instructional guides.

We value feedback – so if there is anything that we can improve, we would love to know.



2.1. Permission and Roles

There are 4 Key Roles that have slightly different access permissions.

1. **Team Member:** All JESI Team Members can create, edit, delete or cancel their Activity details. Upon arrival Team Members can also Check-In themselves.
2. **Monitor:** The main function of being a 'Monitor' is the ability to create an Activity for other Users, monitor their travel status and respond to Escalations. Monitors do not have permission to perform functions for Teams that they are not attached to.
3. **Manager:** A Manager has the ability to add and manage Users that are associated with their Team/s. Managers have permission to create Users, add Users to their Teams, create and manage Activities and view User Activity and System Statistic Reports, for the Teams that they are attached to. If Managers are not attached to a Team they will not be able to view or perform functions for these teams. Managers can attach Active Users to their Team/s.
4. **Administrator:** Administrators control the integrity of the JESI software and meet organisational policies. Administrators have access to all the same permission levels as a Team Member, Monitor and Manager, however they have added authority to manage Teams and also Customise Locations.
5. **Company Administrator:** Company Administrators control the integrity of the JESI software and meet organisational policies. Company Administrators have the same access and permissions as Administrators however permission access to Webhooks, API Tokens and SSO configuration.

****User:** a person who has access to JESI regardless of their JESI Role. All Key Roles in JESI are Users.

JESI Permissions Access Level Control



TEAMS	Team Member	Monitor	Manager	Admin	Company Admin
Create Teams	✗	✗	✗	✓	✓
Add/Edit Escalation Contacts	✗	✗	✓	✓	✓
Add/Edit Escalation Levels and Times	✗	✗	✓	✓	✓
Edit all	✗	✗	✗	✓	✓
Deactivate Team	✗	✗	✗	✓	✓
View Teams they are in	✓	✓	✓	✓	✓
View all Company Teams	✗	✗	✗	✓	✓

USERS	Team Member	Monitor	Manager	Admin	Company Admin
Create Users	✗	✗	✓	✓	✓
Edit Users	✗	✗	✓	✓	✓
Deactivate Users	✗	✗	✓	✓	✓
Determine Role Permission	✗	✗	✓	✓	✓
View Users in their Teams	✗	✓	✓	✓	✓
View all Company Users	✗	✗	✓	✓	✓
Send Activation SMS	✗	✗	✓	✓	✓

LOCATIONS	Team Member	Monitor	Manager	Admin	Company Admin
Create Custom Locations	✗	✗	✗	✓	✓
Edit Custom Locations	✗	✗	✗	✓	✓
Delete Custom Locations	✗	✗	✗	✓	✓
View all Custom Locations	✓	✓	✓	✓	✓

REPORTS	Team Member	Monitor	Manager	Admin	Company Admin
Team Member Activity	✗	✓	✓	✓	✓
System Stats	✗	✓	✓	✓	✓
Export CSV	✗	✓	✓	✓	✓

Last updated: October 2020

JESI Permissions Access Level Control



RISK ASSESSMENTS	Team Member	Monitor	Manager	Admin	Company Admin
Add a Risk Assessment to a Team	✗	✗	✓	✓	✓
Complete a Risk Assessment	✓	✓	✓	✓	✓
Complete a Risk Assessment on Anyone's Behalf	✗	✗	✗	✓	✓
Complete a Team Members Risk Assessment	✗	✓	✓	✓	✓
Review a Team Members Risk Assessment	✗	✓	✓	✓	✓
Review any Users Risk Assessment	✗	✗	✗	✓	✓

ACTIVITIES	Team Member	Monitor	Manager	Admin	Company Admin
Create Activity	✓	✓	✓	✓	✓
Create, Edit, Cancel, Check-in and Add Notes for Anyone in the Organisation	✗	✗	✗	✓	✓
Create, Edit, Cancel, Check-in and Add Notes for Anyone in the Teams they are in	✗	✓	✓	✓	✓
Edit Activities	✓	✓	✓	✓	✓
Cancel Activities	✓	✓	✓	✓	✓
Add Notes	✓	✓	✓	✓	✓
Create Favourites	✓	✓	✓	✓	✓
Tag Passengers	✓	✓	✓	✓	✓
View Activities of Users in their Teams	✗	✓	✓	✓	✓
View all Company Activities	✗	✗	✗	✓	✓
Be Escalation Contact for Teams they are in	✗	✓	✓	✓	✓
Be Escalation Contact for any Team	✗	✗	✗	✓	✓

Last updated: October 2020

2.1.1. Team Member Role

Team Members are responsible for creating and editing their Activity details. They are also responsible for Checking-In when they arrive at their various locations.

2.1.2. Monitor Role

The main function of being a 'Monitor' is the ability to create an Activity for other Users, monitor their travel status and respond to Escalations. Monitors do not have permission to perform functions for Teams that they are not attached to.

2.1.3. Manager Role

As a Manager it is your responsibility to manage the Users that are in your Teams.

Managers have permission to create Users, add Users to their Teams, create and manage Activities and view User Activity and System Statistic Reports, for the teams that they are attached to. If Managers are not attached to a Team they will not be able to view or perform functions for that Team. Managers can attach Active Users to their Team/s.

2.1.4. Administor Role

As an Administrator it is your responsibility to control the integrity of the JESI software and adhere to organisational policies.

Administrators have complete access to JESI's functionality and includes: 'Create Users', 'Manage Users', 'Create New Managed Activities', 'Create Teams', 'Manage Teams', 'Manage Escalation Levels', and view both the 'User Activity' and 'System Statistics' Reports.

3. Getting Started

The automated communication in JESI is by SMS and email and all JESI Users are required to have a unique mobile number and email address.

The email address is the Users' unique login to the JESI Company Account.

A Users' mobile number is critical to ensure the communication is being sent to/received by the correct User.

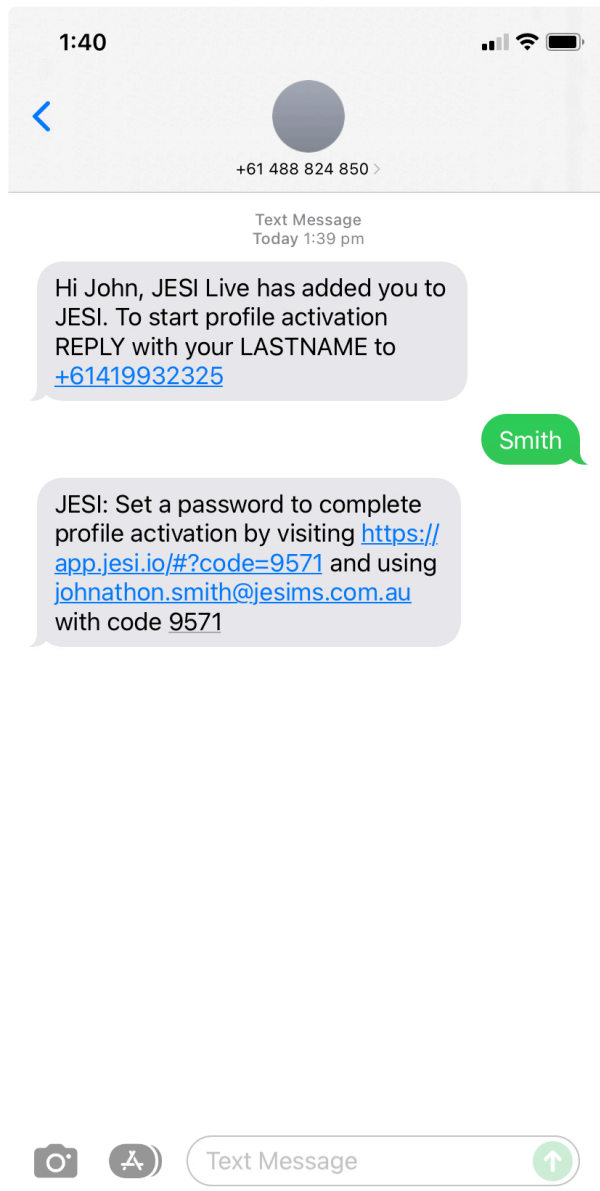
Another User in the same JESI Company account cannot share/use the same email address or mobile number.

3.1. Activate JESI Profile


Getting started with JESI is very easy. An Administrator or Manager will create a User Profile that will send an activation SMS. Once a User replies to the SMS with their last name, JESI will confirm the activation by sending an SMS with a unique security code and a web address link to create a password.

For new User WhatsApp activation, follow this guide here: [Using WhatsApp for New JESI Profiles](#)


Read the Terms and Conditions by using the link within the SMS (Smartphone) or copying the link into an internet browser.



Clicking on the top link in the second SMS will direct the user to the login page for Activation. Enter your email address.



Welcome

 Enter Email Address
john.smith@company.com.au

☐ Remember Email

CONTINUE

OR

LOGIN WITH SINGLE SIGN-ON

[What is Single Sign-On?](#)

[Don't have a login?](#)

Enter code from SMS and press CONTINUE.



Set Password

jeremy@jesims.com.au ✎

Security Code sent to mobile number
associated with email above.

[Resend](#)

Enter Security Code from SMS




Set a Password



CONTINUE

By using JESI you are agreeing to our
[Terms and Conditions](#)

Create a password, and press CONTINUE.



Set Password

johnathon.smith@jesims.com.au

Security Code sent to mobile number associated with email above.

Enter Security Code from SMS

9571

Set a Password

•••••

CONTINUE

[Terms and Conditions](#)

AA app.jesi.io

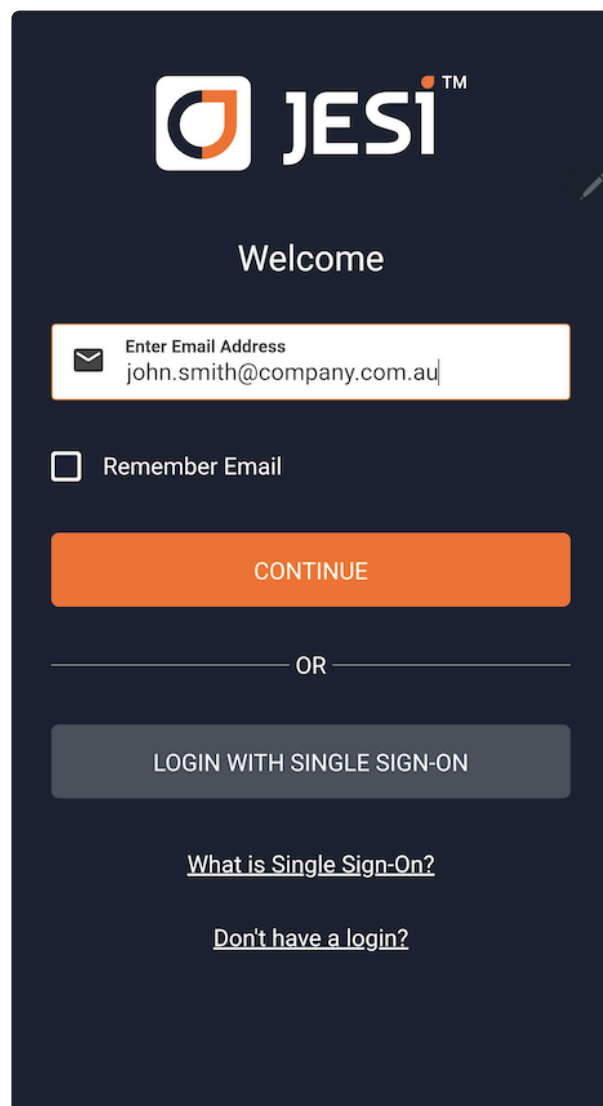
Note: Password is not a case or character sensitive unless your company has a specific Password Policy

3.2. Logging into JESI

JESI Company account can be accessed via a desktop login, smart phone or a device with internet access.

To login via JESI website go to www.jesi.io and click the LOGIN button.

'LOGIN' to JESI. Enter email and select CONTINUE.

The image shows the JESI login interface. At the top is the JESI logo, which consists of a stylized 'J' in a square followed by the text 'JESI' with a trademark symbol. Below the logo is the word 'Welcome'. There is a text input field with a mail icon and the placeholder text 'Enter Email Address'. The email 'john.smith@company.com.au' is entered in the field. Below the input field is a checkbox labeled 'Remember Email'. A large orange button labeled 'CONTINUE' is positioned below the checkbox. Underneath the 'CONTINUE' button is a horizontal line with the word 'OR' in the center. Below this line is a grey button labeled 'LOGIN WITH SINGLE SIGN-ON'. At the bottom of the form, there are two links: '[What is Single Sign-On?](#)' and '[Don't have a login?](#)'.

JESITM

Welcome

Enter Email Address
john.smith@company.com.au

☐ Remember Email

CONTINUE

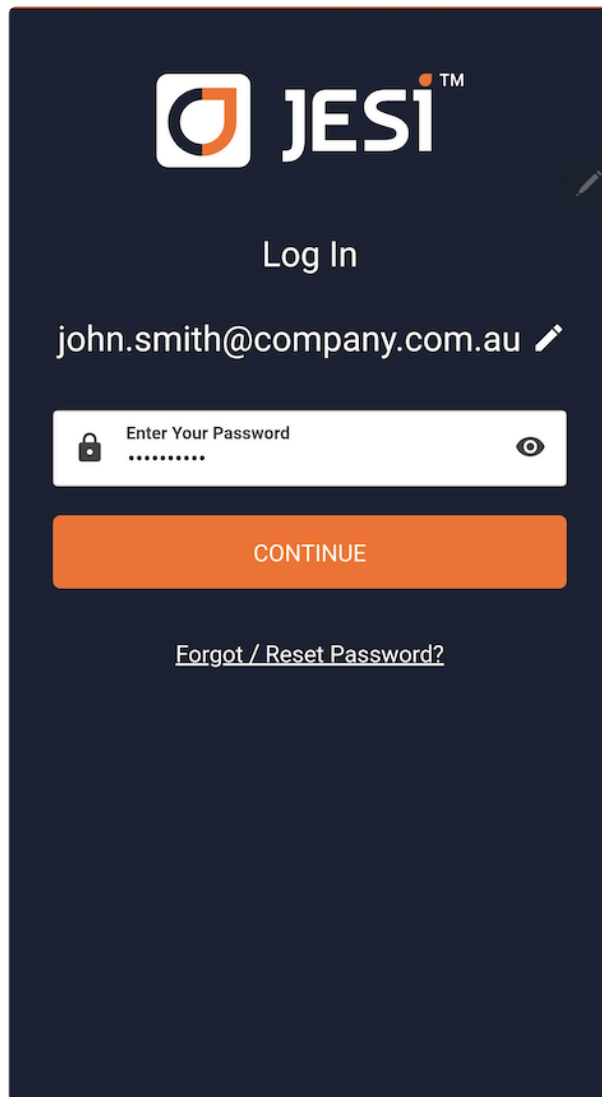
OR

LOGIN WITH SINGLE SIGN-ON

[What is Single Sign-On?](#)

[Don't have a login?](#)

Enter password and select LOGIN.



The image shows a dark blue login interface for JESI. At the top left is the JESI logo, which consists of a stylized 'J' in a square followed by the text 'JESI' and a trademark symbol. Below the logo is the text 'Log In'. Underneath that is the email address 'john.smith@company.com.au' with a small edit icon to its right. Below the email is a password field with a lock icon on the left, the text 'Enter Your Password', a series of dots representing the password, and an eye icon on the right to toggle visibility. Below the password field is an orange button with the text 'CONTINUE'. At the bottom of the form is a link that says 'Forgot / Reset Password?'.

JESI™

Log In

john.smith@company.com.au

Enter Your Password

CONTINUE

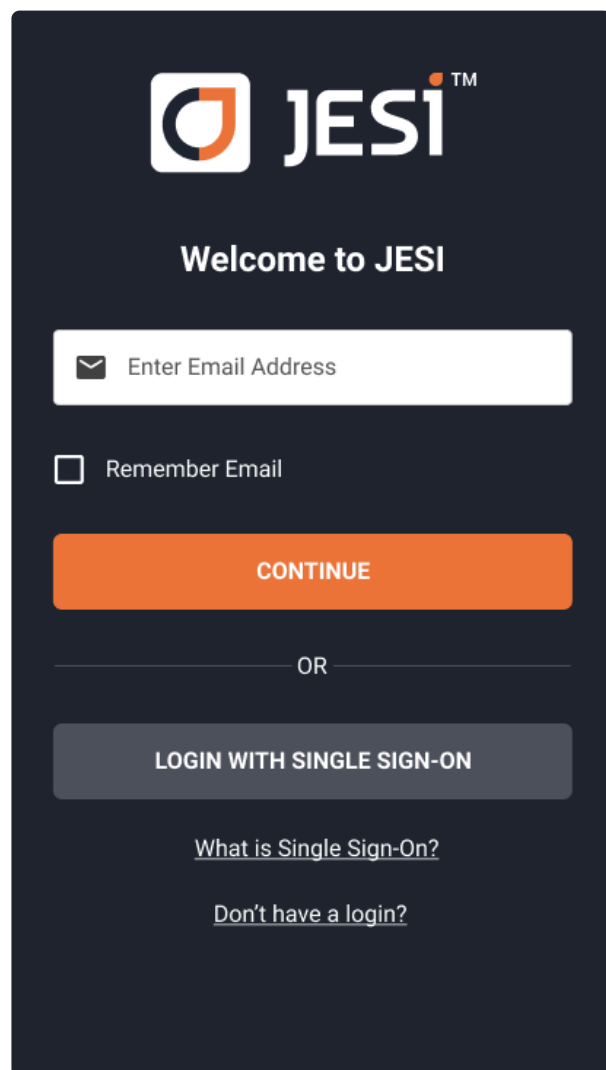
[Forgot / Reset Password?](#)

Note: [Save the JESI web link as a favourite or bookmark using smartphone and/or computer.](#)

3.2.1. Logging into JESI with Single Sign-On

To login to JESI via Single Sign-On, using your identity provider login details, please see below instruction for managed devices and non managed devices.

If on a company managed device, log into JESI easily from the login screen and click the login with Single Sign-On button.

The image shows the JESI login interface on a dark blue background. At the top is the JESI logo, which consists of a stylized 'J' inside a square followed by the text 'JESI' and a small 'TM' trademark symbol. Below the logo, the text 'Welcome to JESI' is displayed. There is a white input field with a mail icon and the placeholder text 'Enter Email Address'. Below this field is a checkbox labeled 'Remember Email'. A large orange button with the text 'CONTINUE' is positioned below the checkbox. Underneath the button is a horizontal line with the word 'OR' in the center. Below the line is a grey button with the text 'LOGIN WITH SINGLE SIGN-ON'. At the bottom of the screen, there are two links: 'What is Single Sign-On?' and 'Don't have a login?'.

JESITM

Welcome to JESI

Enter Email Address

☐ Remember Email

CONTINUE

OR

LOGIN WITH SINGLE SIGN-ON

[What is Single Sign-On?](#)

[Don't have a login?](#)

Enter your email address and click continue.



Single Sign-On

Enter the email that matches your SSO credentials.

 Enter Email Address

CONTINUE

[What is Single Sign-On?](#)

[Login with your JESI login details](#)

You are now logged in.

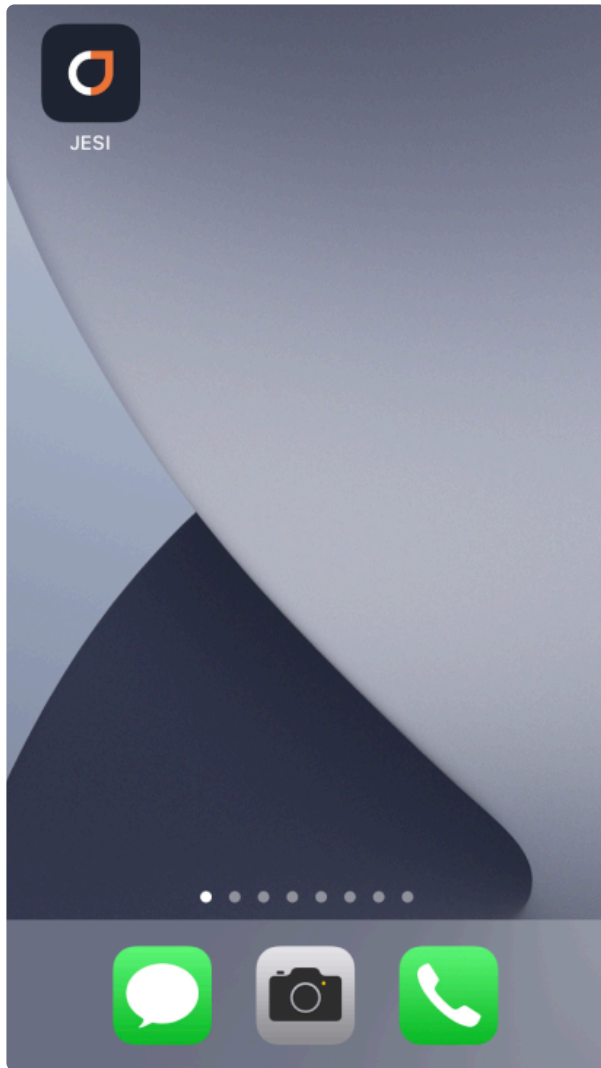


You have no current or upcoming Activities




Need a hand? Check out our [Training Centre](#) for tutorials and getting started guides


Alternatively, you can click on the JESI app icon on your managed device and you will be logged into JESI.



If you are on a non-managed device, you can log into JESI from the JESI login screen. Click the login with Single Sign-On button.



Welcome to JESI

 Enter Email Address

☐ Remember Email

CONTINUE

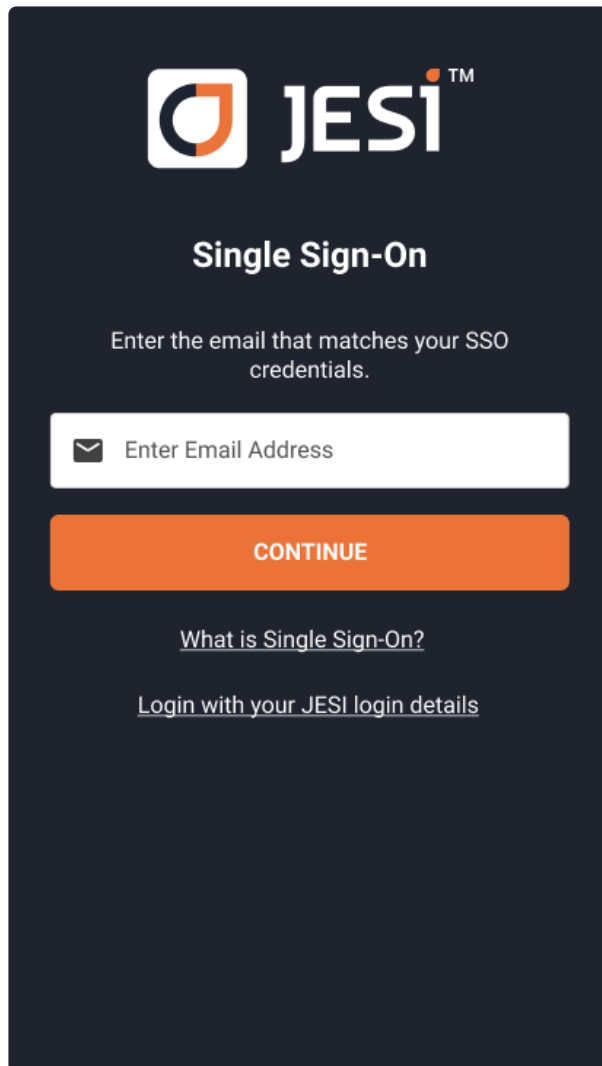
OR

LOGIN WITH SINGLE SIGN-ON

[What is Single Sign-On?](#)

[Don't have a login?](#)

Enter your email address and click continue.



The image shows a dark-themed login screen for JESI. At the top left is the JESI logo, which consists of a stylized 'J' inside a square followed by the text 'JESI' and a trademark symbol. Below the logo, the title 'Single Sign-On' is centered. Underneath the title, a message asks the user to enter an email matching their SSO credentials. There is a white input field with a mail icon and the placeholder text 'Enter Email Address'. Below the input field is an orange button labeled 'CONTINUE'. At the bottom, there are two links: 'What is Single Sign-On?' and 'Login with your JESI login details'.

JESITM

Single Sign-On

Enter the email that matches your SSO credentials.

✉ Enter Email Address

CONTINUE

[What is Single Sign-On?](#)

[Login with your JESI login details](#)

Enter your password and click continue.



Enter Your Password

SIGN IN

You are now logged in.

3.2.2. Why do I have to keep Logging In?

iOS Update 30 June 2021

On the 30th of June 2021, Apple released new iOS security features to iPhones. These features include new security fixes and patches. However, after this release, it has introduced a blocker where Progressive Web Apps (referred to as a PWA, JESI is a PWA) and Safari are blocked from each other, **causing an extra log in when clicking on a JESI link that is located in a SMS or email.**

TIP: Access the JESI Application using the [shortcut on your home screen](#) or directly from the login on the JESI website.

At this moment there is not a quick fix as this is affecting the entire global PWA ecosystem on iPhones. However, we are working towards a potential solution. If you have any questions, please contact support@jesims.com.au

3.3. Setting up Mobile Device

After logging into a User profile on a smart device, a shortcut can be added for quick, easy access so that it looks and feels like an 'app'.

On a computer save the web URL as a bookmark. To login, use the link in either the activation SMS or email or go to jesi.io and click LOGIN in the top right hand corner of the screen.

To see how a shortcut can be added to an Android phone [CLICK HERE](#)

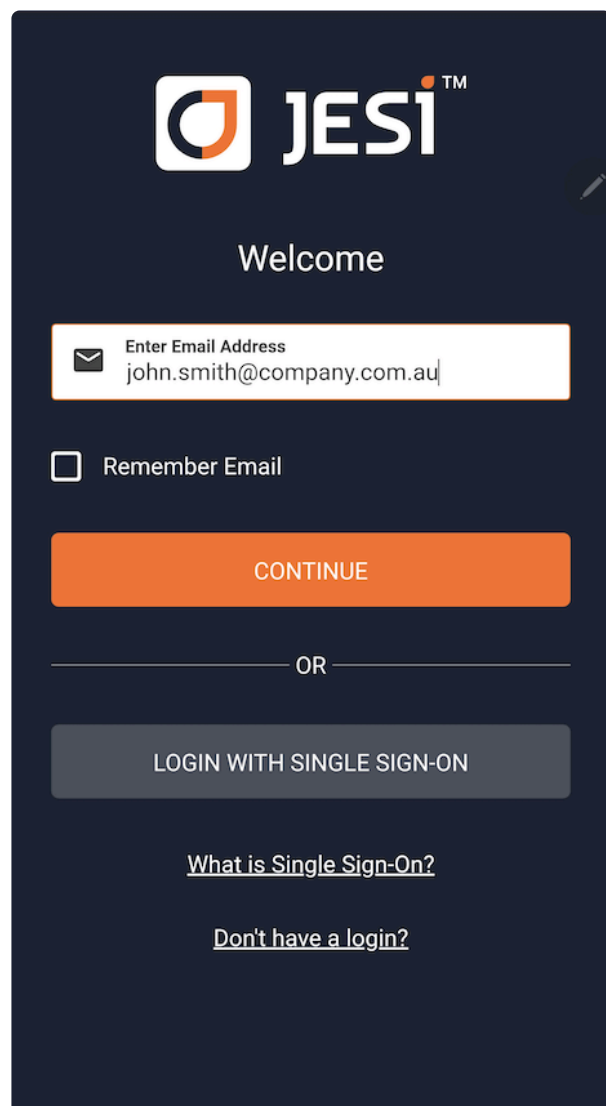
To see how a shortcut can be added to an iPhone [CLICK HERE](#)

See how a shortcut can be added to the latest version of Android O/S [CLICK HERE](#)

or [view Instructions in PDF Format](#)

3.4. Forgotten or Reset Password

If your password has been forgotten go to the JESI Login page, enter your email address and press CONTINUE.

A screenshot of the JESI login interface. At the top is the JESI logo, consisting of a stylized 'J' in a square followed by the text 'JESI™'. Below the logo is the word 'Welcome'. A text input field with a mail icon on the left contains the placeholder text 'Enter Email Address' and the email address 'john.smith@company.com.au'. Below the input field is a checkbox labeled 'Remember Email'. A large orange button with the text 'CONTINUE' is positioned below the checkbox. Underneath the button is a horizontal line with the word 'OR' in the center. Below this line is a grey button with the text 'LOGIN WITH SINGLE SIGN-ON'. At the bottom of the form are two links: '[What is Single Sign-On?](#)' and '[Don't have a login?](#)'.

JESI™

Welcome

Enter Email Address
john.smith@company.com.au

☐ Remember Email

CONTINUE

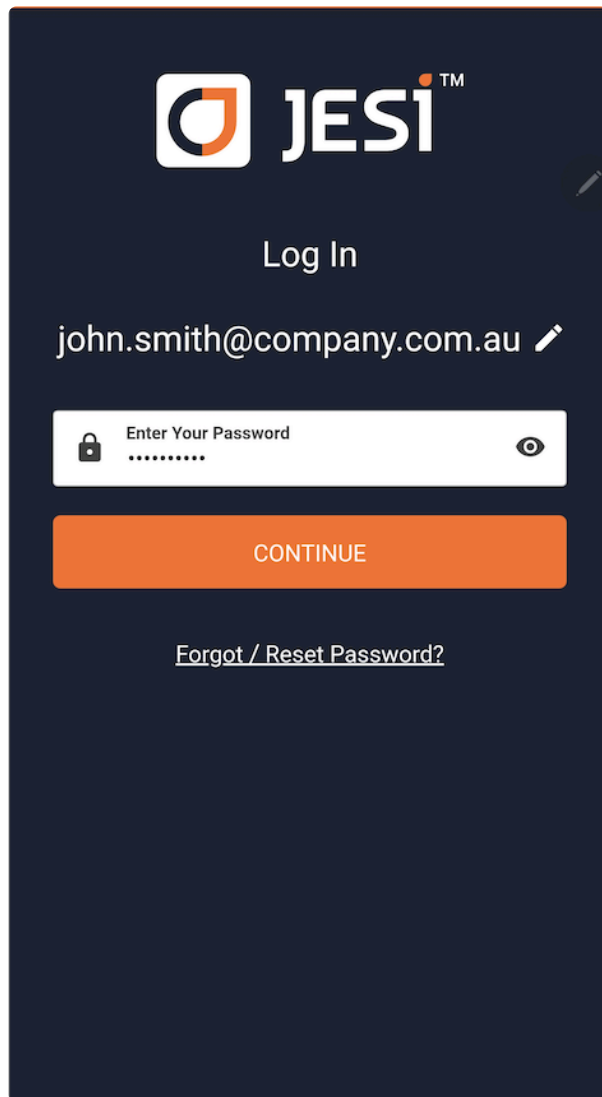
OR

LOGIN WITH SINGLE SIGN-ON

[What is Single Sign-On?](#)

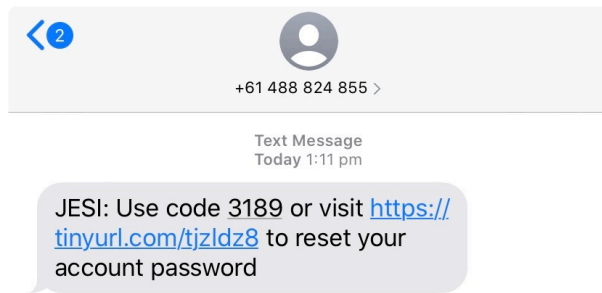
[Don't have a login?](#)

Below the CONTINUE button, select FORGOT / RESET Password




The image shows a mobile application login screen for JESI. At the top, the JESI logo is displayed on a dark blue background. Below the logo, the text "Log In" is centered. Underneath, the email address "john.smith@company.com.au" is entered into a text field, with a small edit icon to its right. Below the email field is a password field with the placeholder text "Enter Your Password" and a series of dots representing the password. To the right of the password field is an eye icon for toggling visibility. Below the password field is an orange button labeled "CONTINUE". At the bottom of the screen, there is a link that says "Forgot / Reset Password?".

This will generate a reset password SMS to your mobile phone number in JESI – take note of the code.



Click on the link in the SMS, enter the code and press CONTINUE.



Set Password

johnathon.smith@jesims.com.au

Security Code sent to mobile number associated with email above.

Enter Security Code from SMS

9571

Set a Password


••••••

CONTINUE

[Terms and Conditions](#)

AA app.jesi.io

Create new password.



Set Password

johnathon.smith@jesims.com.au

Security Code sent to mobile number associated with email above.

Enter Security Code from SMS

9571

Set a Password

••••••

CONTINUE

[Terms and Conditions](#)

AA app.jesi.io

Note: A password is not case or character sensitive unless required by Company account.

3.5. My Profile

To check that your User profile information is accurate, click on the 'My Profile' option found in the left hand side menu.

A photo can be uploaded to personalise your profile. Subscribing to a calendar will mean that every Activity created for the User will be automatically added to a calendar. If a User requires additional mobile numbers i.e because they travel internationally, multiple numbers can be added to a Users' profile.

Note: Ensure that the profile has a Default Team.

If mobile numbers, email address or Teams need to be amended please contact a Manager to update.

JESI

My Profile

SAVE

ACTIVITIES

- My Activities
- New Journey
- Working From Home
- Working On-Site
- Lone Worker
- Wellbeing Check
- Favourites
- History

MANAGE

- My Profile
- Training Centre
- What's New
- Sign Out
- John Smith
- JESI

PROFILE PHOTO

Dimensions must be at least 200px x 200px.

UPLOAD PHOTO

MOBILE NUMBERS

+61491678976 Active Number

MY CALENDAR

Add JESI to your calendar program once and it will sync all of your current and future journeys automatically.

SUBSCRIBE TO MY CALENDAR

DEFAULT TEAM

Select a Team

3.5.1. How to set Default Team

Users can be added to multiple Teams, however only a Manager or Administrator with the correct permission can administer the amendment. A User can set their Default Team to enable a better JESI User experience.

To change or check the Team attached as a Default, click on My Profile (found in the left hand side menu) and using the dropdown box select the correct Default Team.

If the User's Team cannot be located in the dropdown box the Team may be Deactivated. If the Team is Registered, it will appear in the dropdown box however it cannot be saved as a Default, only Active Teams (with a green circle) can be saved as a Default Team.

3.5.2. Switching Mobile Numbers

Once an additional mobile number has been added to a User's profile by a Manager or an Administrator, a User can then alternate between mobile numbers by changing the Active mobile number on their profile. A User will need to follow the activation process before the mobile number can be used. Follow instructions for [activation process](#).

To change to the mobile number that is going to be used, click on My Profile and change Active mobile.

The screenshot displays the 'My Profile' page in the JESI system. On the left is a dark sidebar with the JESI logo and navigation links under 'ACTIVITIES' and 'MANAGE'. The main content area is titled 'My Profile' and includes a 'SAVE' button in the top right corner. The profile section shows a placeholder for a profile photo with the initials 'JS' and an 'UPLOAD PHOTO' button. Below this is the 'MOBILE NUMBERS' section, which lists a single number '+61491678976' as the 'Active Number'. The 'MY CALENDAR' section contains a message about syncing the calendar and a 'SUBSCRIBE TO MY CALENDAR' button. At the bottom, the 'DEFAULT TEAM' section features a dropdown menu labeled 'Select a Team'.

3.5.3. Adding an Activity to a Calendar

JESI has the ability to add your Activity to your calendar.

To Activate:

1. Select “My Profile” from the left hand side menu
2. Click on “SUBSCRIBE TO MY CALENDAR”
3. Your default calendar on your device will ask you to “Subscribe” to this calendar, click ‘yes’ or ‘subscribe’

You only have to do this once, then all of your Activity created will be displayed in your default calendar.

Some calendar programs may vary when subscribing to a web calendar. For further troubleshooting please refer to your calendar provider for further info on subscribing to a web calendar.

The screenshot displays the 'My Profile' page in the JESI application. On the left is a dark sidebar menu with the JESI logo at the top. Under 'ACTIVITIES', options include 'My Activities', 'New Journey', 'Working From Home', 'Working On-Site', 'Lone Worker', 'Wellbeing Check', 'Favourites', and 'History'. Under 'MANAGE', options include 'My Profile' (which is highlighted), 'Training Centre', 'What's New', 'Sign Out', and user information 'John Smith' and 'JESI'. The main content area is titled 'My Profile' and has a 'SAVE' button in the top right corner. It contains four sections: 1. 'PROFILE PHOTO' with a circular placeholder showing 'JS', a note 'Dimensions must be at least 200px x 200px.', and an 'UPLOAD PHOTO' button. 2. 'MOBILE NUMBERS' with a text input field containing '+61491678976' and a label 'Active Number'. 3. 'MY CALENDAR' with a note 'Add JESI to your calendar program once and it will sync all of your current and future journeys automatically.' and an orange 'SUBSCRIBE TO MY CALENDAR' button. 4. 'DEFAULT TEAM' with a dropdown menu labeled 'Select a Team'.

4. Managing An Activity

A User has the ability to:

1. Create an Activity (manually or upload a travel itinerary),
2. View their history,
3. Edit their Activity details,
4. Save an Activity as a favourite,
5. Confirm their GPS coordinates at a Check-In,
6. Report an Incident on an Activity, and
7. Sync JESI to an online calendar they use.

An Activity is based on a Start Location, date, time, and an End Location. It also includes the type of Activity being undertaken between the Start Location (of the Activity), and the scheduled Check-Ins (Example: Travelling by car/plane or Working From Home). At the time and date that has been entered as a Check-In (either part way through your Activity and/or the End Location of your Activity), JESI will automatically send an SMS and an email for the User to Check-In. Check-In can be done by replying to the SMS or by clicking through the link in the email. If a Check-In reminder has not been acknowledged, JESI will then automate an alert to a predetermined Escalation Contact in the Company.

4.1. Creating a New Journey

To create a New Journey there are two ways in which checkpoints can be added to the New Journey. Manually or from map. Below are instructions for both options, please add the checkpoints either manually or from the map, not both.

Adding checkpoints manually:

1. Click on 'New Activity'**

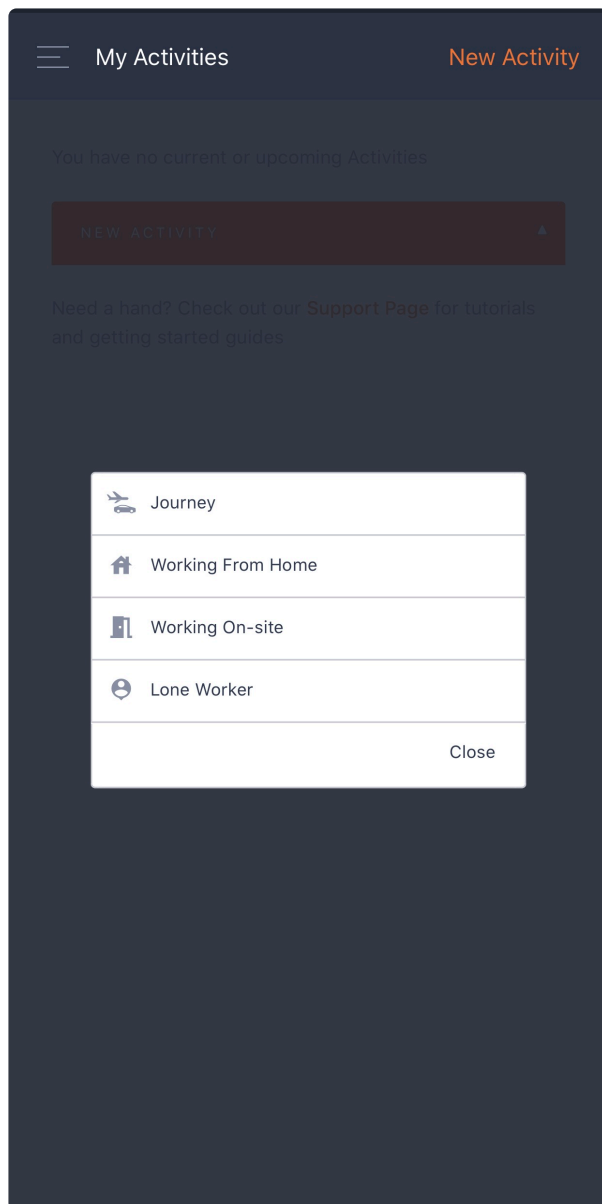


You have no current or upcoming Activities




Need a hand? Check out our [Support Page](#) for tutorials and getting started guides

2. Select 'Journey'.



3. Check that your 'Team' is accurate – if the Team is not displayed the Team may not be Active – an error will appear when attempting to save the Activity if this is the case.

4. Enter the 'Start Location, date and time of departure'.




Save


Jeremy Martin
Description...

TEAM Customer Success Team

SHARE TO [BETA] None

PASSENGERS None

**From...**
11/02/2022 00:05 ▼





Car Fleet

Additional Information...

TIP: Use the Additional Information field to provide information such as:

- Vehicle Registration Number
- Fleet Number
- Flight Number
- Satellite Phone Number etc...

 View Map / Routes 

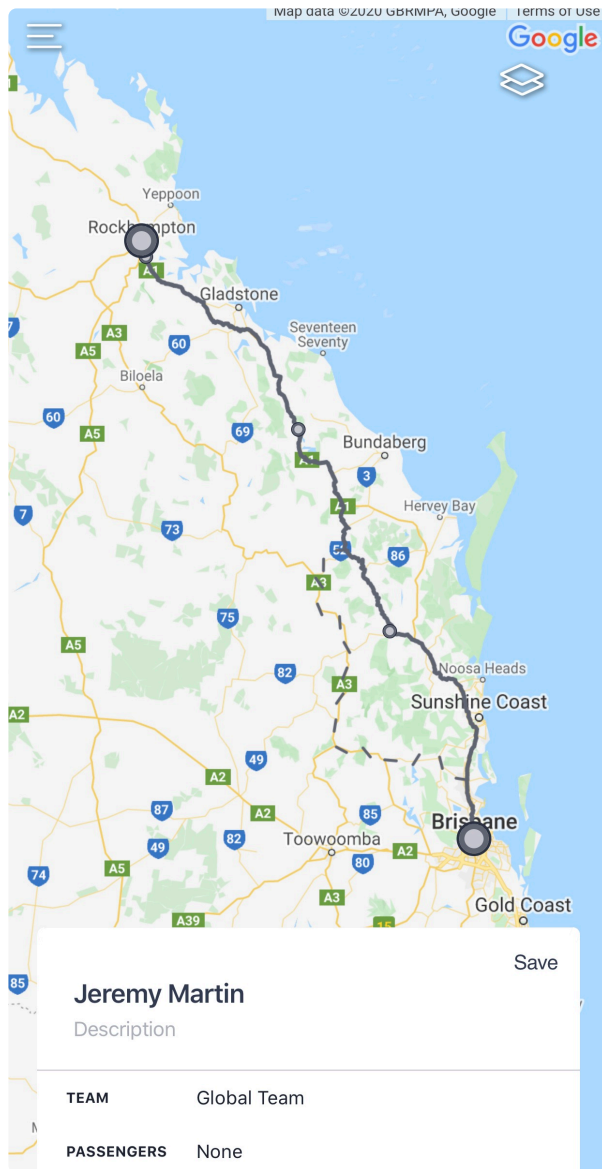
5. Enter any locations or stops that apply to your activity and the final destination, include the location, date and anticipated time of arrival for added checkpoints.

6. Press SAVE.

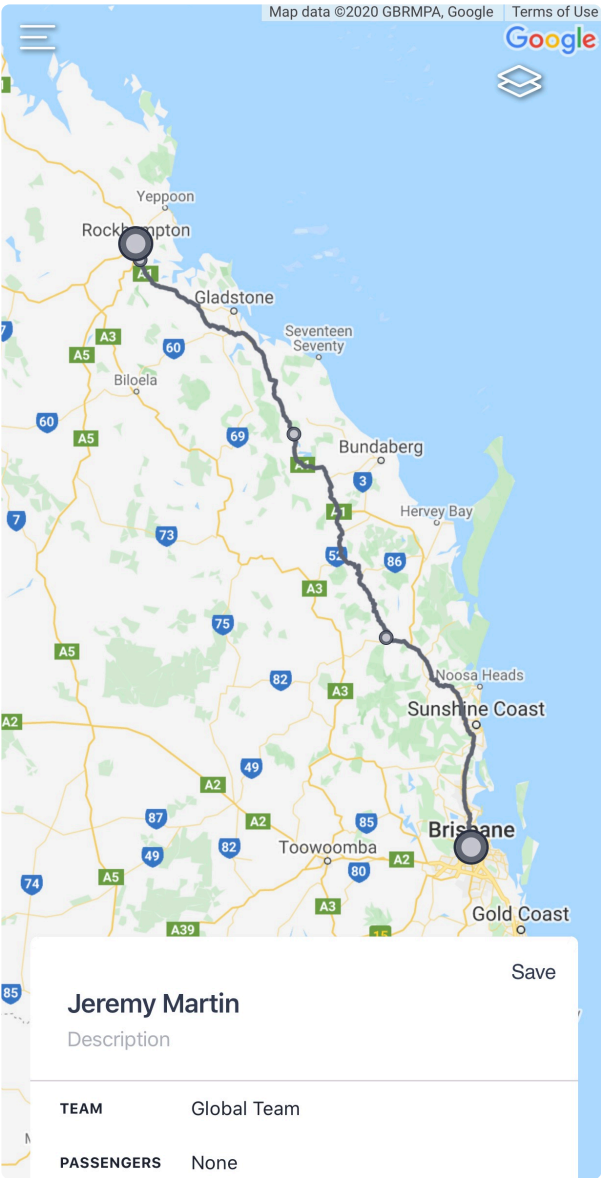
Adding checkpoints from the Map using Route Planner:

[CLICK here to watch 3 min Video](#)

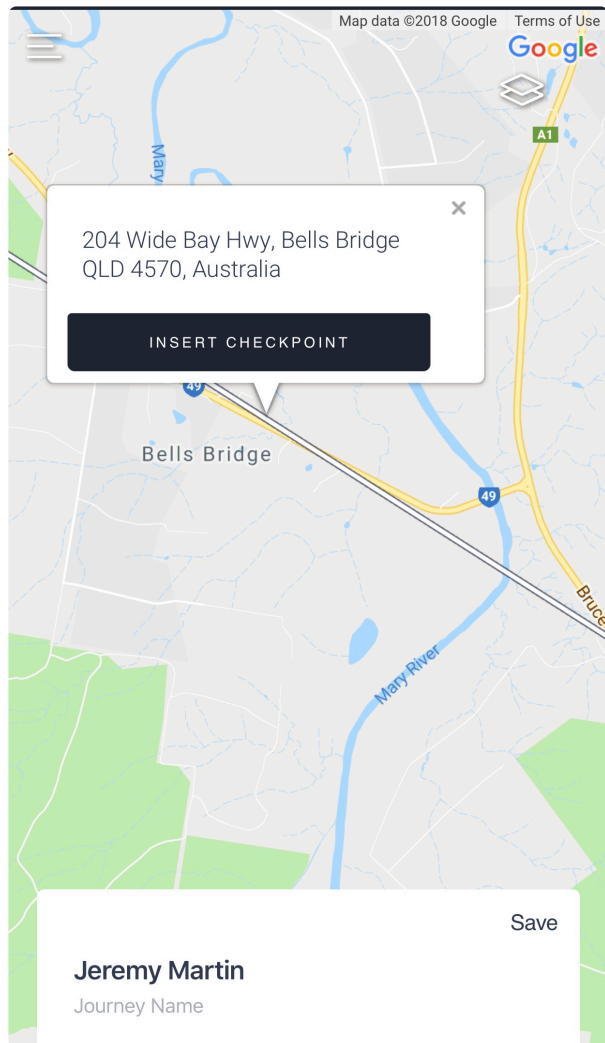
1. To select a route using a mobile device move the slide bar down on the screen to show the map and routes available. If using a desk top, after entering a Start Location and End Location, the route options will appear on the map.



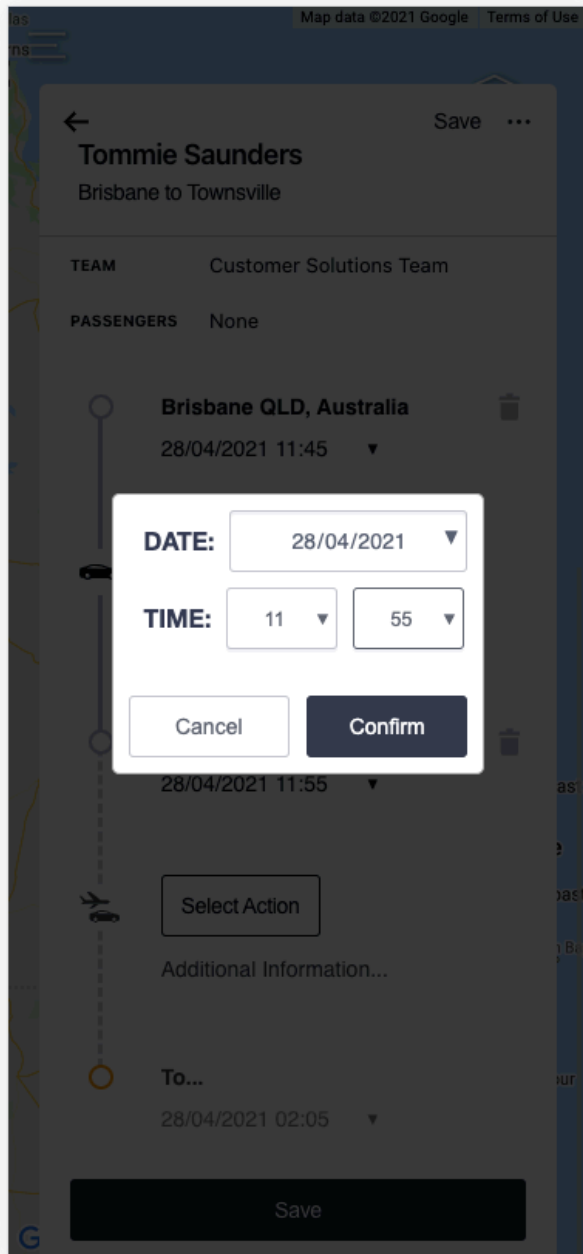
2. Click on the route that you will be taking. If the selected route is more than 200km, it will show a distance marker every 200km.



3. If using a mobile device, and there are Check-Ins along the way, add these manually into the slide bar, with the correct location, time and date. If using the map/route planner, zoom in on the selected route, press (hold down with finger tip) on the location and insert the Check-In. If using a desktop, use the mouse to select the Check-In. Press and hold with the left side clicker of the mouse.



4. Modify the time of arrival and date if necessary.



5. Click on 'Save Activity'

****NOTE:** The images above have been completed on a mobile device.

Legacy Creating a Journey

The locations are attached to Google Maps.

1. Click on 'New Journey' from the left hand menu.
2. Check that the 'Team' is accurate.
3. Enter 'Origin'.
4. If there are checkpoints along the way add now
5. Enter 'Destination / Final Checkpoint'.
6. Click on 'Save Journey'.

The screenshot shows the 'New Journey' form in the JESI application. On the left is a dark sidebar with the JESI logo and a menu with categories: MONITOR (Traveller Activity), JOURNEYS (My Journeys, New Journey, Favourites, History), MANAGE (New Managed Journey, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The 'New Journey' page has a title bar and several sections: 'JOURNEY' with an optional name field; 'PASSENGERS' with an 'Add a Passenger' button; 'TEAM' with a dropdown menu set to 'JESI SET UP TEAM' and a '5 min' duration; a 'Set Origin' field with a location pin icon; a date field set to '03/06/2019'; and time fields for '13' and '15'. A 'SET ORIGIN' button is located at the bottom right of the form.

New Journey

JOURNEY

Enter Journey Name (Optional)

PASSENGERS ⓘ

Q Add a Passenger

TEAM: ⓘ

JESI SET UP TEAM

5 min

JA

Set Origin

03/06/2019

13 15

SET ORIGIN

4.2. Creating an Activity using a Travel Itinerary

Travel itineraries can be automatically uploaded directly into JESI. It will automatically select **ALL** segments on the travel itinerary and create Check-Ins in JESI. Simply forward the email with the attached travel itinerary to trips@jesi.io

There are two ways in which an itinerary can be uploaded into JESI:

1. The User can upload the itinerary themselves or
2. This can be done on behalf of the User

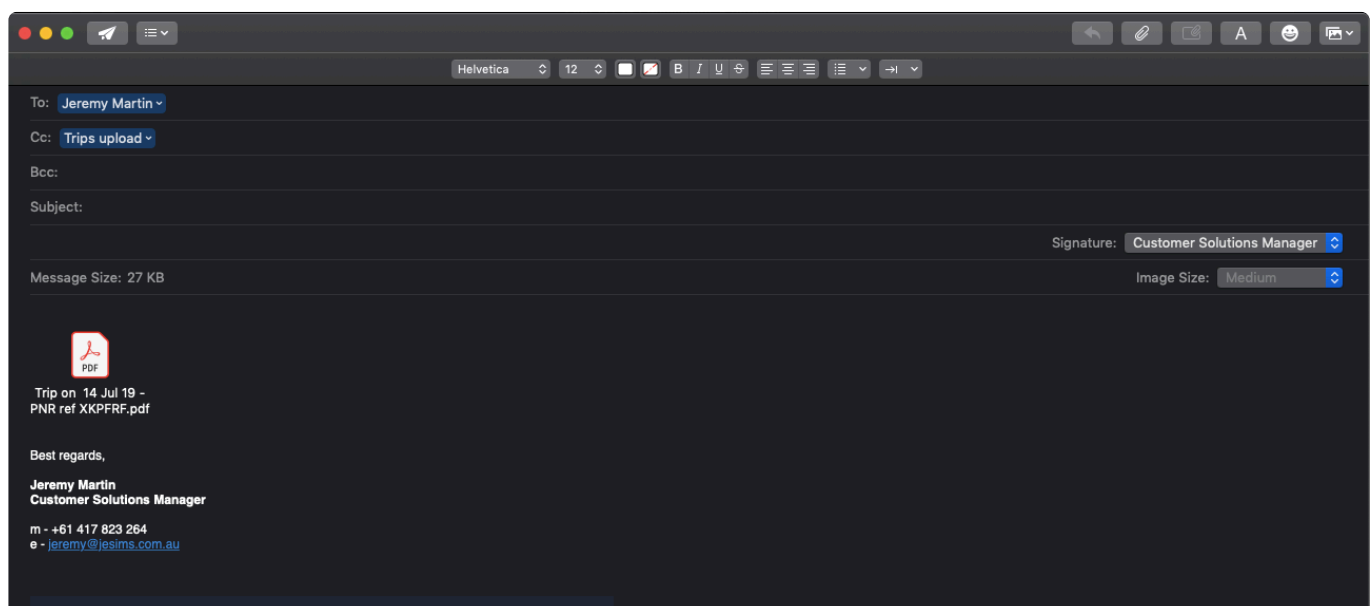
1. User to upload

Simply attach the pdf itinerary to a new blank email (ensure there is only one itinerary per email), leave the subject line blank and send to trips@jesi.io. An email notification is sent if the Activity has been created or rejected. If the itinerary fails to upload, the Activity will then need to be created manually.

Please forward failed itinerary uploads to jeremy@jesims.com.au or contact the JESI online Helpdesk Support.

2. Upload on Users behalf

Attach the itinerary to a new email (ensure there is only one itinerary per email), leave the subject line blank and email to the User and Cc trips@jesi.io (see example below). An email notification is sent if the Activity has been created or rejected.



If the itinerary fails to upload, the Activity will then need to be created manually.

Please forward failed itinerary uploads to customersuccess@jesims.com.au or contact the JESI online Helpdesk Support.

IMPORTANT INFORMATION

Only one itinerary can be uploaded per User per email.

If there is accommodation included in the email the User **MUST** go into JESI and edit the Check-In time for the accommodation.

If the Activity failed to upload please ensure the User has no other active Activities in JESI and that they are assigned to a Default Team.

4.3. Creating a Working From Home Activity

1. Create Working From Home Activity by selecting New Activity and the Working From Home button.

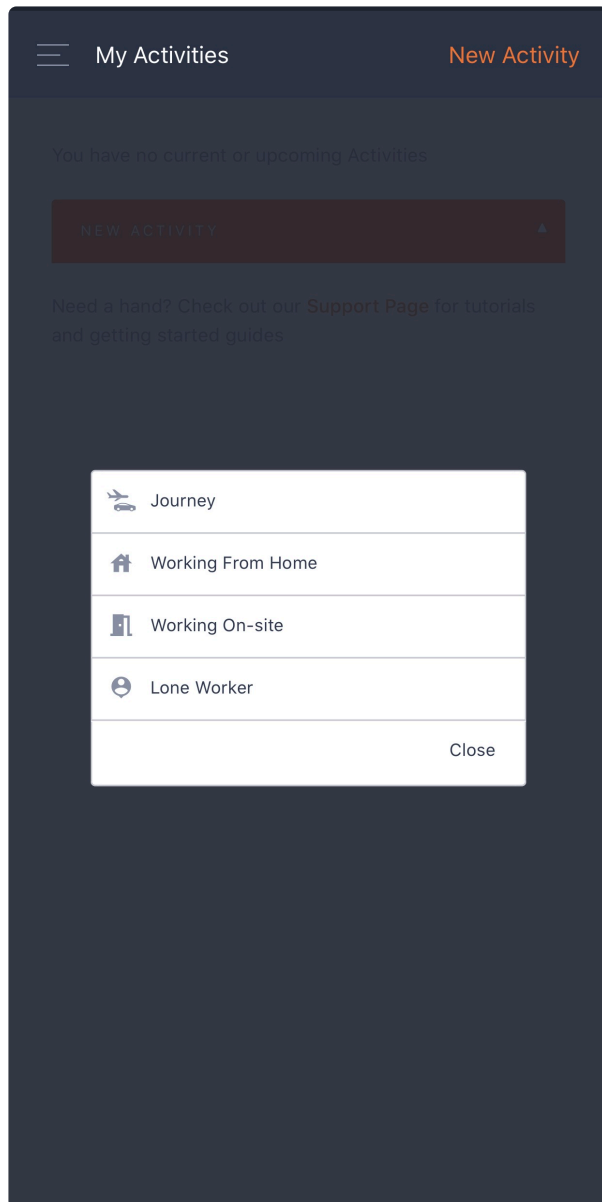


You have no current or upcoming Activities




Need a hand? Check out our [Support Page](#) for tutorials and getting started guides

2. Select Working from Home.




3. Enter working location, date, start and end time and Check-In intervals if required. If not required select Not Applicable), press Next.

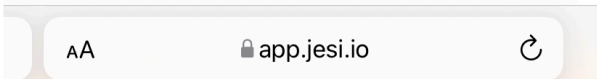


Jeremy Martin
Description...

TEAM	Customer Success Team
SHARE TO [BETA]	None
LOCATION	Where are you working from?
DATE	11 Feb 2022 ▼
START TIME	09 ▼ 00 ▼
END TIME	17 ▼ 00 ▼
CHECK-IN	Every 4 hours ▼

Next





4. Confirm Check-In times are correct, multiple Check-Ins can be added (if required), press Save.

Save

Jeremy Martin
Description

TEAM Working from Home Team

PASSENGERS None

12 Leeson Street, 12 Leeson St, Boo...
30 Mar 2020 ▼ 09▼ 00▼

Additional Information
12 Leeson Street, 12 Leeson St, Boo...
30 Mar 2020 ▼ 17▼ 00▼

Additional Information
To
30 Mar 2020 ▼ 07▼ 10▼

Save

5.If enabled, the Working From Home Risk Assessment will open automatically to be completed.

Risk Assessment Question: 1 of 16

Is the floor around the work area level?

Yes

No


Working from home
12 Leeson Street
20th Mar 17:30

Edit Journey

Click [here](#) to watch overview video.

4.4. Creating a Working On-Site Activity


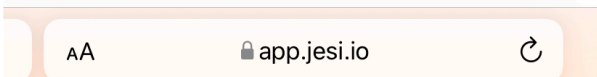
1. Create Working On-Site Activity by selecting Working On-Site button. Enter working location, date, start and end time and Check-In intervals if required. If not required select Not Applicable, press Next.



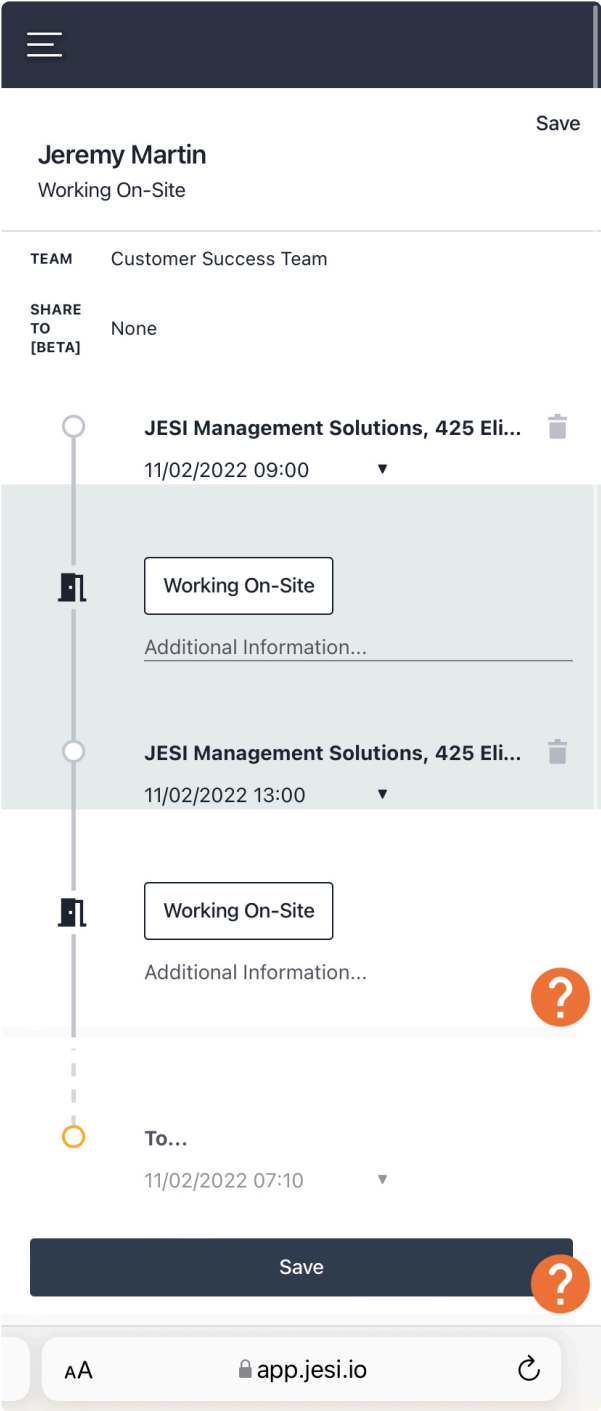
Jeremy Martin
Description...

TEAM	Customer Success Team
SHARE TO [BETA]	None
LOCATION	Where are you working from?
DATE	11 Feb 2022 ▼
START TIME	09 ▼ 00 ▼
END TIME	17 ▼ 00 ▼
CHECK-IN	Every 4 hours ▼

Next


2. Confirm Check-In times are correct, press SAVE.



3. Check-In when reminder notifications are received.

4.5. Creating a Lone Worker Activity


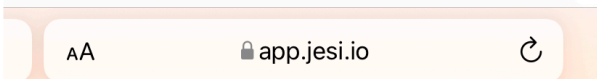
1. Create Lone Worker Activity by selecting Lone Worker button. Enter working location, date, start and end time and Check-In intervals if required. If not required select Not Applicable, press Next.




Jeremy Martin
Description...

TEAM	Customer Success Team
SHARE TO [BETA]	None
LOCATION	Where are you working from?
DATE	11 Feb 2022 ▼
START TIME	09 ▼ 00 ▼
END TIME	17 ▼ 00 ▼
CHECK-IN	Every 4 hours ▼

Next


2. Confirm Check-In times are correct, press SAVE.




John Smith
Lone Worker


Save

TEAM Test001




JESI Management Solutions, 425 El...
15/02/2022 09:00 ▼







Lone Worker

Additional Information...




JESI Management Solutions, 425 El...
15/02/2022 13:00 ▼







Lone Worker

Additional Information...




JESI Management Solutions, 425 El...
15/02/2022 17:00 ▼







Lone Worker

Additional Information...



To...
15/02/2022 07:10 ▼



Save 

3. Check-In when reminder notifications are received.

4.6. My Favourites

If an Activity is undertaken regularly, it can be saved in Favourites.

Once an Activity has been created and saved, click on the Add to Favourites button – this will save this Activity in Favourites.

My Activities

NEW JOURNEY WORKING FROM HOME

Brisbane to Rockhampton

NEXT CHECK-IN
Rockhampton, QLD, Australia

TIME
Due in 6 hours 24th Apr 18:15

VIEW EDIT ADD TO FAVOURITES

The Favourite Activity can then be accessed from the left hand side menu in the future.

Favourite Activities

Brisbane to Townsville

START LOCATION
QLD, Australia

END LOCATION
QLD, Australia

RECREATE DELETE

12 Leeson Street to Dalby

START LOCATION
12 Leeson St, Boondall QLD 4034, Australia

END LOCATION
QLD, Australia

RECREATE DELETE

Townsville City to Townsville

START LOCATION
Townsville City QLD 4810, Australia

END LOCATION
Townsville QLD, Australia

RECREATE DELETE

Townsville City to Brisbane City

[Click here to watch Edit an Activity and add to Favourites instructions.](#)

The Favourites function will only save the Locations, the User will need to update the dates and times of the Activity.

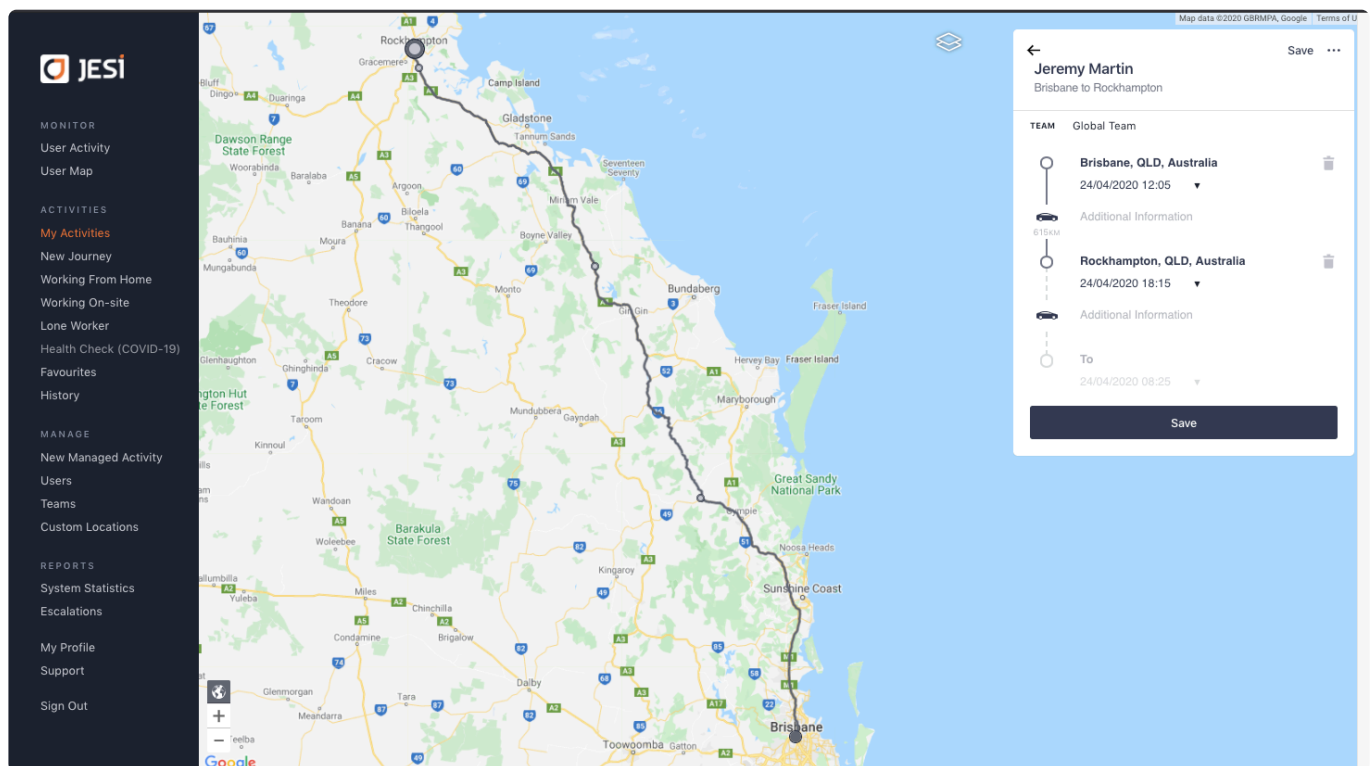
4.7. Amending an Activity

An Activity can be edited to change the location, time or date.

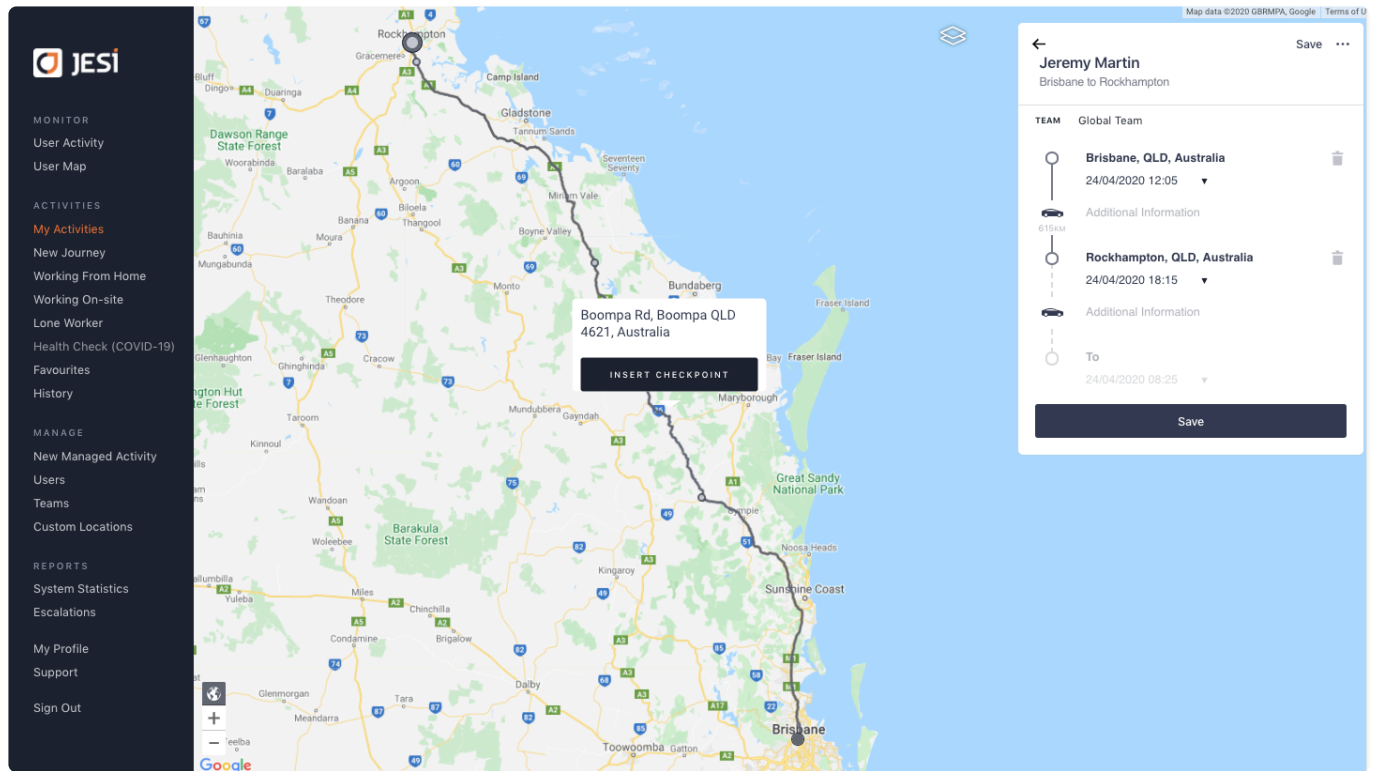
Additional Check-Ins can also be added to the Activity if required. Additional Check-Ins can be added anytime after an Activity has commenced. Check-Ins can only be edited or added that are future dated and not retrospective.

Deleting an Activity can only be completed prior to the Activity becoming Active (commencing) and won't be recorded. Cancelling an Activity can occur after the Activity has become active, however it is still recorded in a Users' history and the Travel Activity Report, for audit purposes.

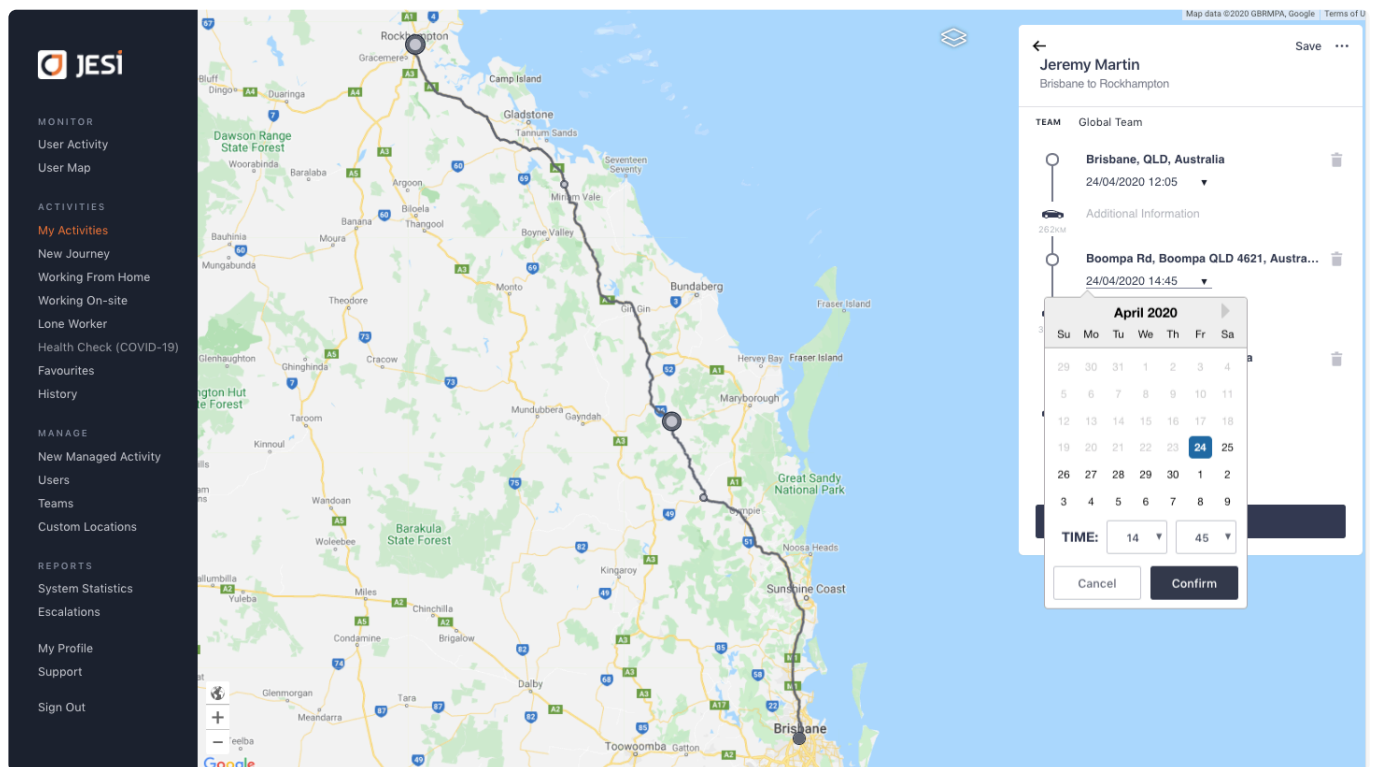
Click on the Activity to edit.



Add an additional Check-In.



Edit time or date.



Press SAVE once updated.

[Click here to watch Edit an Activity and add to Favourites instructions.](#)

4.8. Reactivate a Cancelled Activity

A cancelled Activity can be reactivated. A cancelled Activity can occur if a User misses the time cut off for completing or having their Risk Assessment approved. A cancelled Activity can also occur if the User cancels an Activity after it has become active. Only a User can reactivate their cancelled Activity.

To reactive a cancelled Activity:

Click on the History tab found in the left hand side menu and select the cancelled Activity that needs to be reactivated.

The screenshot shows the JESI Activity History interface. On the left is a dark sidebar with the JESI logo and a menu with categories: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), REPORTS (System Statistics, Escalations), and My Profile (My Profile, Support, Sign Out). The 'History' item is highlighted. The main content area is titled 'Activity History' and displays a list of activities. Each activity card shows the title, status, start and end locations with timestamps, and three buttons: VIEW, RECREATE, and ADD TO FAVOURITES. The activities listed are: 'Brisbane to Rockhampton' (DELETED), 'Brisbane to Townsville' (CANCELLED), 'Working From Home' (DELETED), and 'Brisbane to Mackay' (DELETED).

Activity Title	Status	Start Location	End Location
Brisbane to Rockhampton	DELETED	Brisbane, QLD, Australia 07:50, 28th Apr 2020 (UTC +10:00 AEST)	Rockhampton, QLD, Australia 16:00, 28th Apr 2020 (UTC +10:00 AEST)
Brisbane to Townsville	CANCELLED	Brisbane, QLD, Australia 16:25, 22nd Apr 2020 (UTC +10:00 AEST)	Townsville, QLD, Australia 20:35, 22nd Apr 2020 (UTC +10:00 AEST)
Working From Home	DELETED	Leeson Street, Leeson St, Boondall QLD 4034, Australia 09:00, 23rd Apr 2020 (UTC +10:00 AEST)	Leeson Street, Leeson St, Boondall QLD 4034, Australia 17:00, 23rd Apr 2020 (UTC +10:00 AEST)
Brisbane to Mackay	DELETED		

Click the 'Recreate' button and the Activity will open. Edit the Check-Ins to the correct time, date and location.

4.9. Checking-In

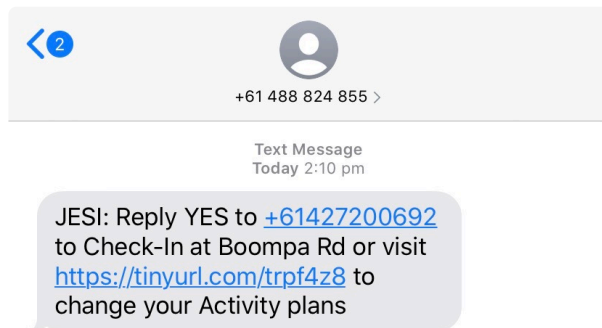
Check-Ins can be completed via SMS or online by logging into JESI Company account either on a mobile or computer.

At the time and date the Check-In is required, JESI will automatically send an SMS and email reminder. To Check-In early, the Check-In must be completed online.

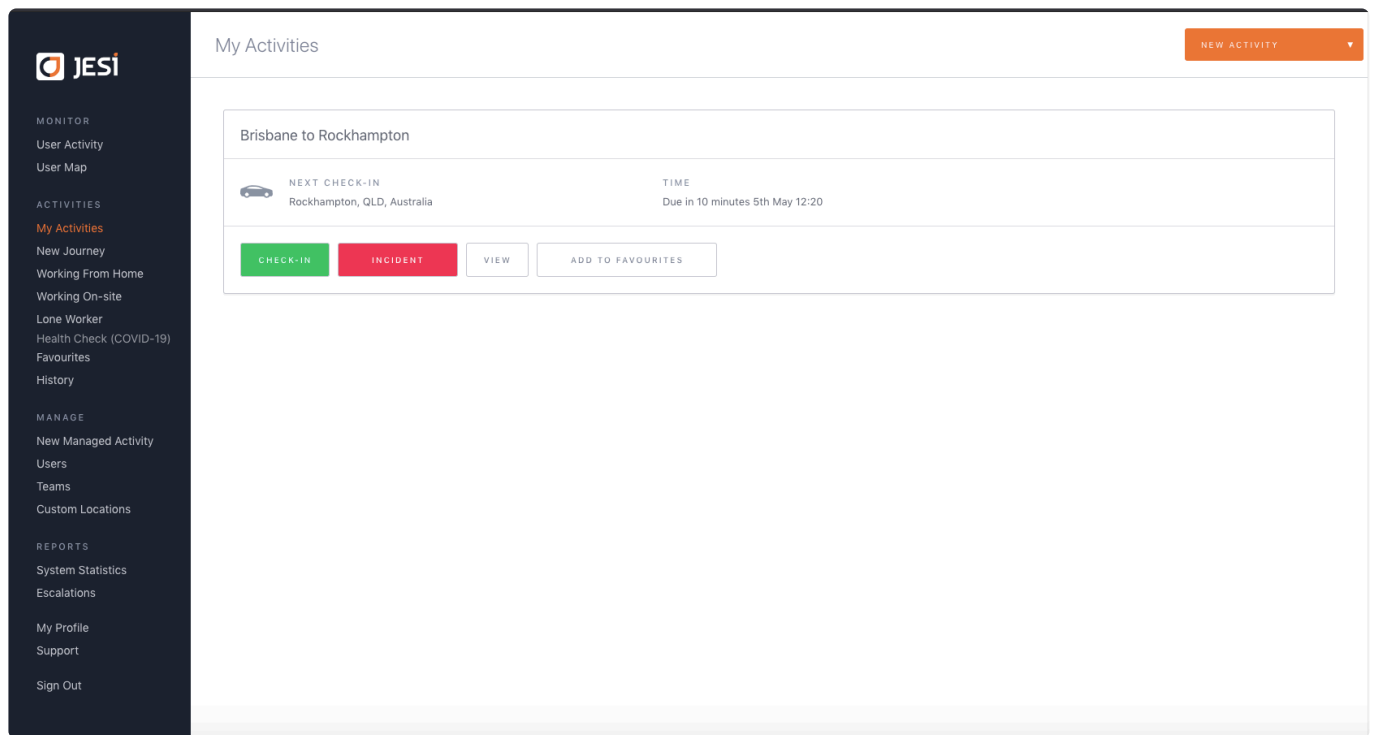
If a Check-In is completed by replying to a SMS, JESI will send another SMS and email confirming that Check-In has been successful.

[Click here to watch video.](#)

Check-In reminder SMS




Check-In online



My Activities NEW ACTIVITY

Brisbane to Rockhampton

NEXT CHECK-IN	TIME
 Rockhampton, QLD, Australia	Due in 10 minutes 5th May 12:20

CHECK-IN INCIDENT VIEW ADD TO FAVOURITES

When Checking-In online JESI will ask the User to confirm the Check-In request to ensure the Check-In button was not pressed in error. Confirm Check-In if you are wanting to Check-In at that location.

4.10. GPS Confirmation Check-In

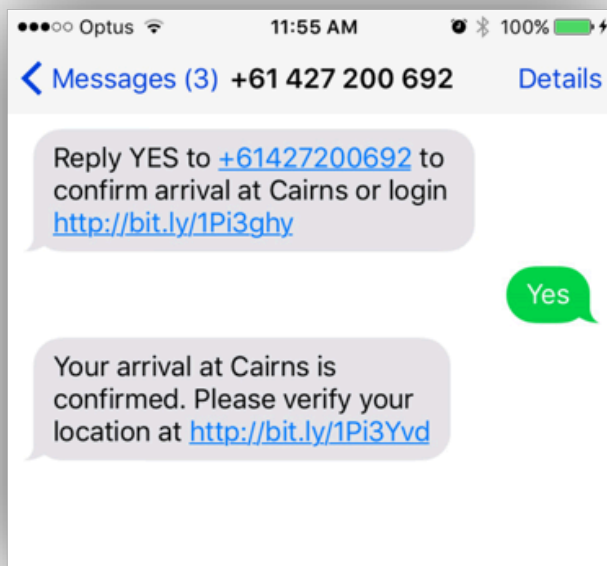
Check-In locations can be confirmed as correct, by matching to a GPS coordinate. The User must have location enabled on their mobile device. We don't recommend using this feature online with a computer as the GPS location can be incorrect if the computer server is linked at a corporate level.

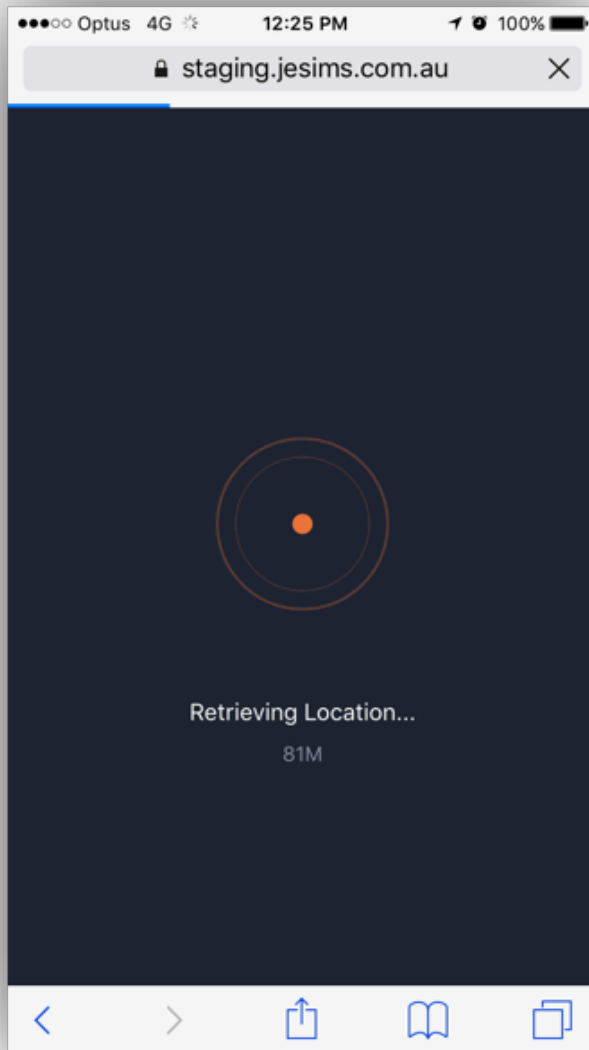
Once the User has replied to the Check-In SMS, another SMS will be activated and include a link. Clicking on the link will open a browser on a smart device and 'ping' to the relevant GPS coordinate.

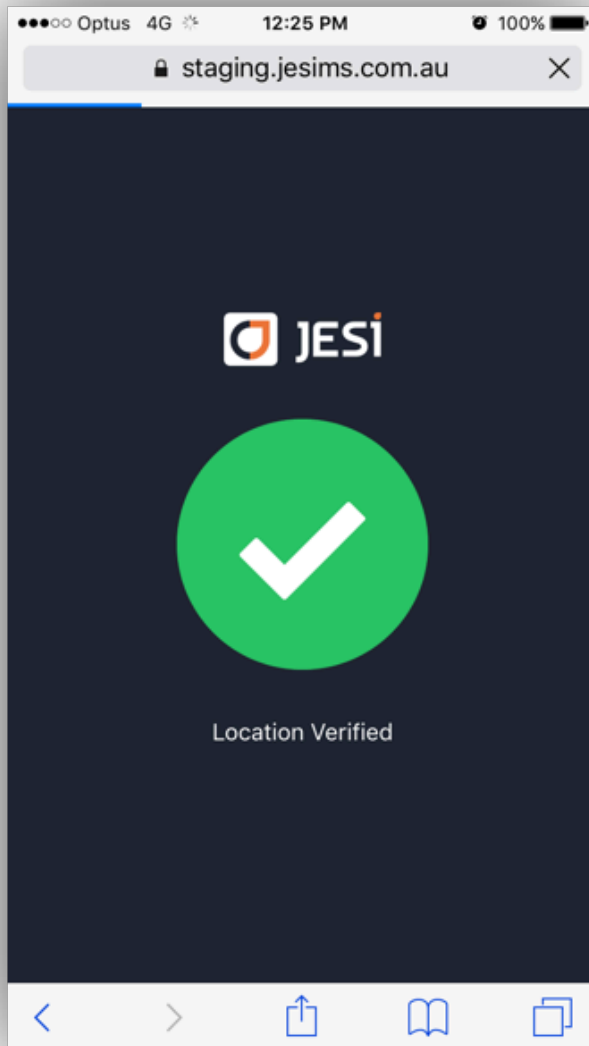
JESI will then recognise your location and reconcile this with the location that was included in the JESI Check-In, within a 100 meter radius. If unsuccessful, you can try again by pressing the button.

Some tips to get a better or quicker result is to;

1. Ensure WiFi is turned on,
2. Confirm GPS in an open area.



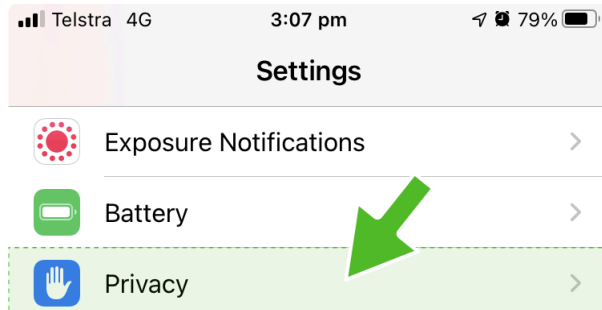




4.10.1. Enable Location Services on iOS

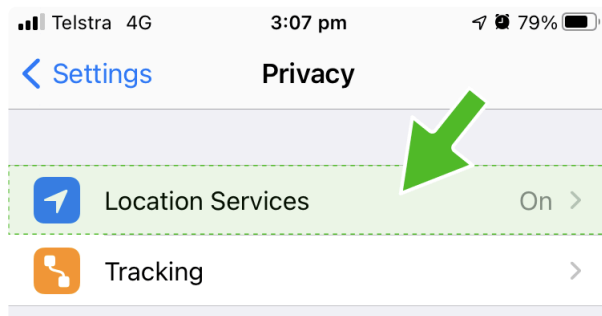
Step 1.

On your phone, navigate to **Settings** then **Privacy**.



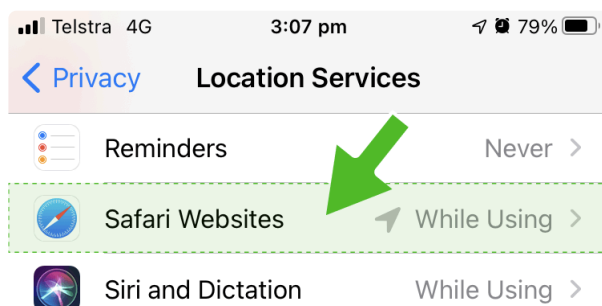
Step 2.

Click on **Location Services**.



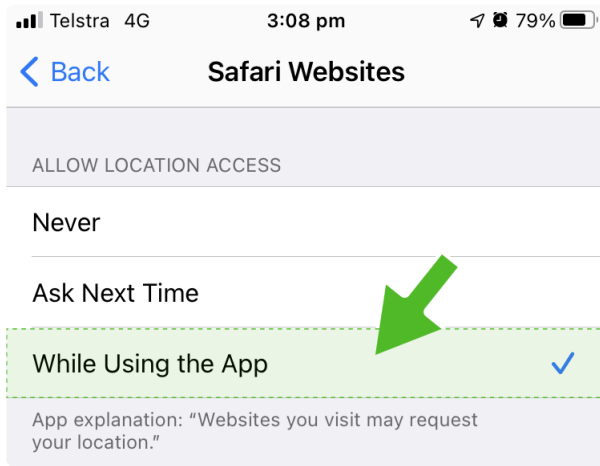
Step 3.

Click on **Safari Websites**.



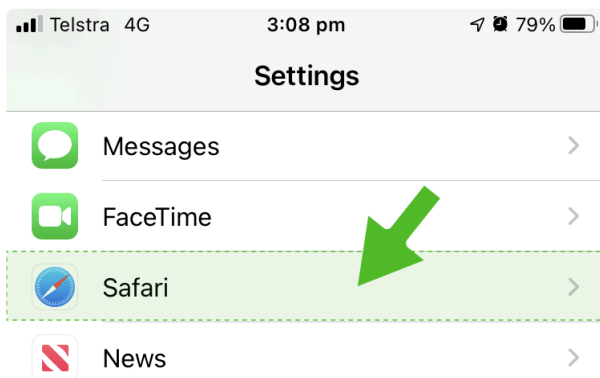
Step 4.

Click on **While Using the App**, located under ALLOW LOCATION ACCESS.



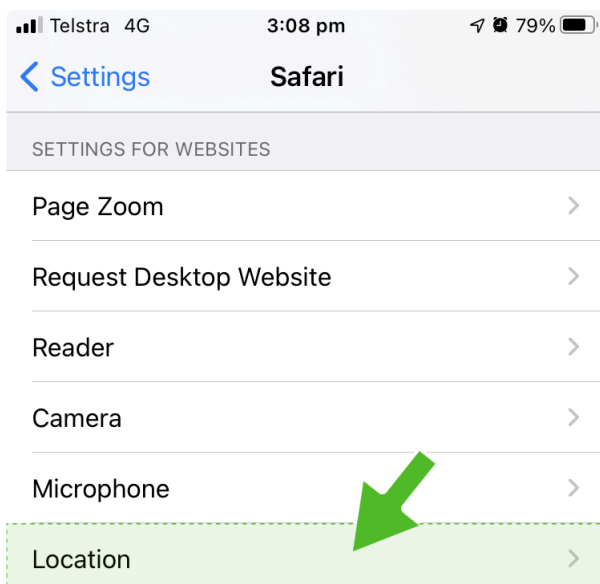
Step 5.

Go **back** to the **Settings** menu and click on **Safari**.



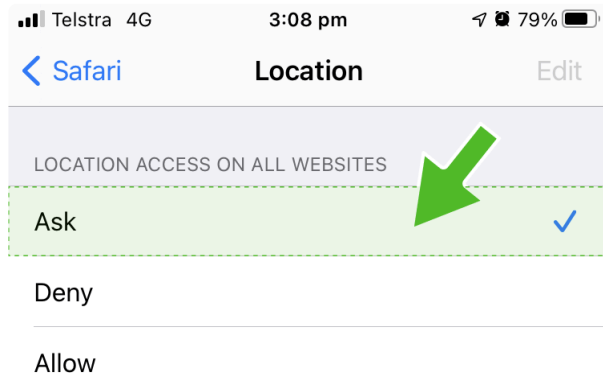
Step 6.

Click **Location**, located under SETTINGS FOR WEBSITES.



Step 7.

Click **Ask**, located under LOCATION ACCESS ON ALL WEBSITES.



Step 8.

Open up [JESI and Check-In to your Activity.](#)

4.11. Reporting an Incident

When on an active Activity a User has the option to report an Incident.

This can be accessed by logging into JESI Company account either through a mobile device or desktop. An Incident can be reported through the My Activity page or by clicking into the Activity and selecting INCIDENT next to the Check-In point. Choose one option, not both, to report the Incident.

My Activity Page Incident Reporting




Brisbane to Rockhampton

NEXT CHECK-IN

Rockhampton, QLD, Australia

TIME

Due in 10 minutes 5th May 12:20



CHECK-IN

INCIDENT

VIEW

ADD TO FAVOURITES

There are two options to choose from, Report and Continue Activity or Report and End Activity.

 My Activities

New Activity


Brisbane to Rockhampton

NEXT CHECK-IN

Rockhampton, QLD, Australia

TIME

Due in 2 minutes 5th May 12:20



Report details of the Incident...

REPORT & CONTINUE ACTIVITY

REPORT & END ACTIVITY

CANCEL

When selecting either of the options include the details of the Incident in the notes section. This information will be sent to the relevant Escalation Contact via SMS and email advising of the Incident that has occurred, and the status i.e. Report and Continue or Report and End Activity.

Reporting an Incident via Activity

Map data ©2019 Google Terms of Use

Jeremy Martin
Perth to Kalgoorlie

TEAM Customersolutions - No TRA

PASSENGERS None

Perth
Started 30th Aug 08:15
30th Aug 10:15 your time
Driving 200KM

Great Eastern Hwy
30th Aug 11:00
30th Aug 13:00 your time
Check-in **Incident**

Driving 200KM

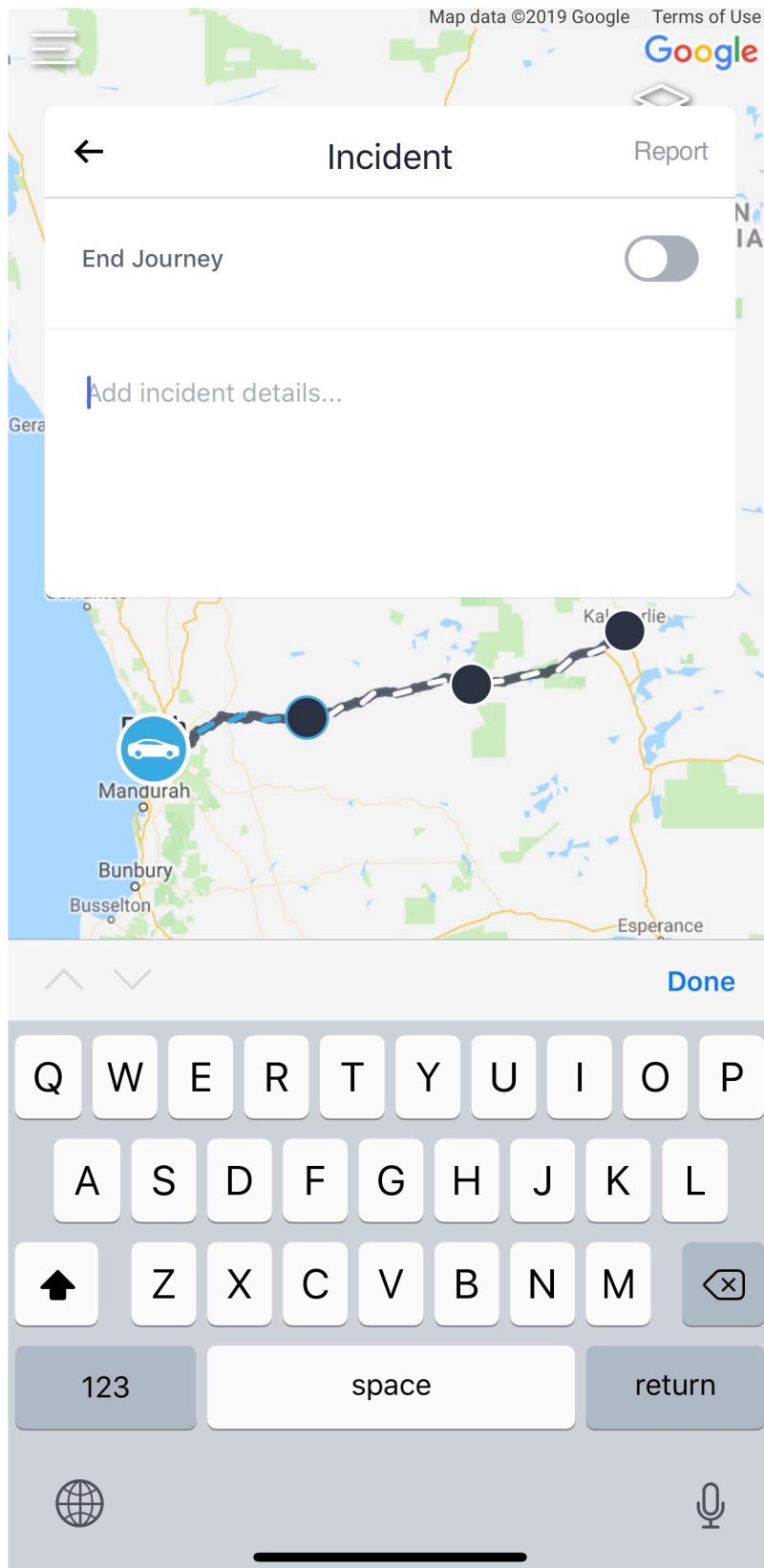
Great Eastern Hwy
30th Aug 13:45
30th Aug 15:45 your time

Driving 193KM

Kalgoorlie
30th Aug 16:25
30th Aug 18:25 your time

Edit Journey

Click on Incident next to Check-In



As above, Report and Continue Activity or End Activity. When selecting either of the options include the details of the Incident in the notes section. This information will be sent to the relevant Escalation Contact via SMS and email advising of the Incident that has occurred and the status i.e. Report and Continue or Report and End Activity.

IMPORTANT

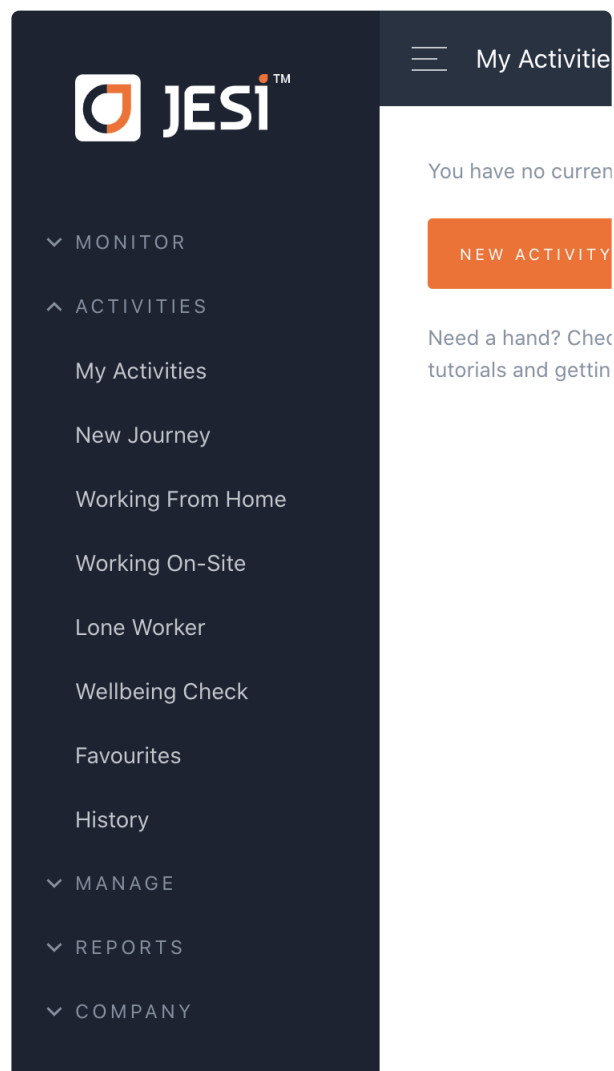
Must have internet connectivity to report an incident.

4.12. Completing a Wellbeing Check

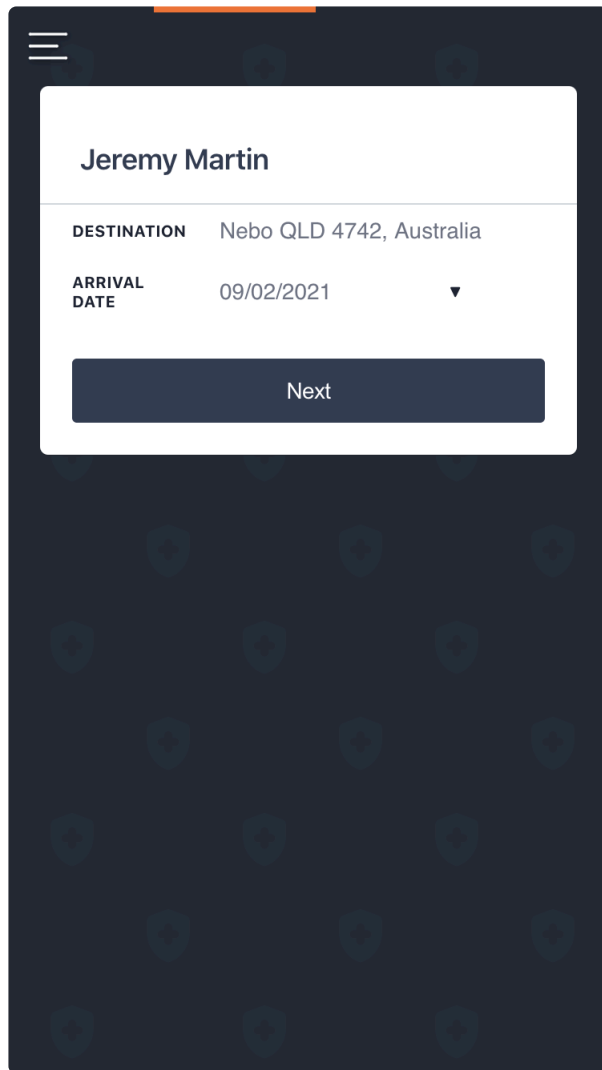
The JESI Wellbeing Check supports JESI clients to assess the physical, emotional and social wellbeing of employees. Depending on answers submitted the Wellbeing Check will be auto approved or will go into review.

The Wellbeing Check is independent to JESI Activity creation.

1. Click on “Wellbeing Check” located in the left hand navigation area.



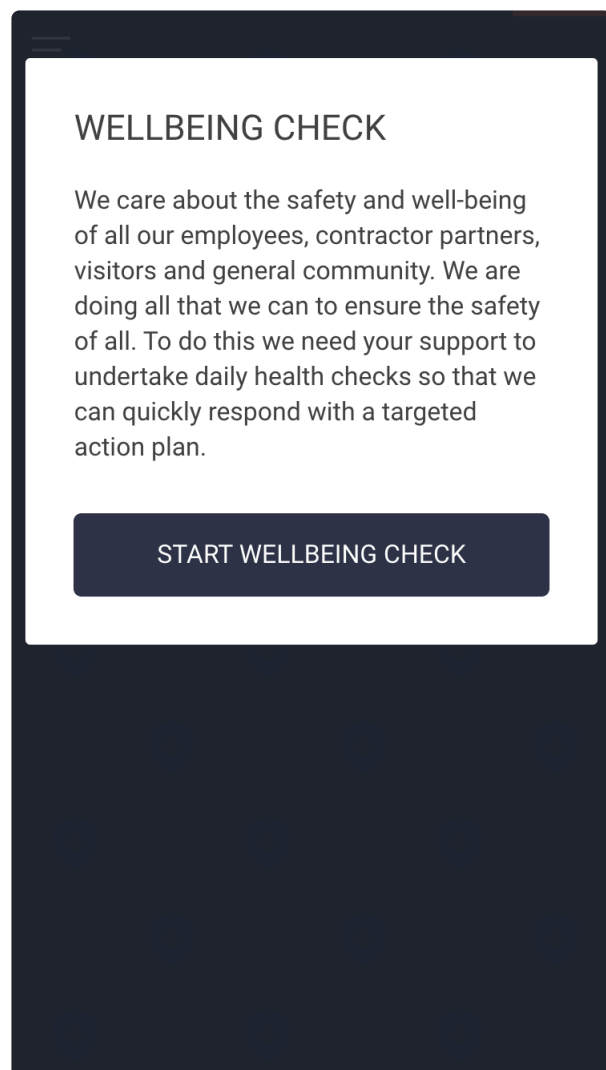
2. Enter location and date you are travelling, press Next.



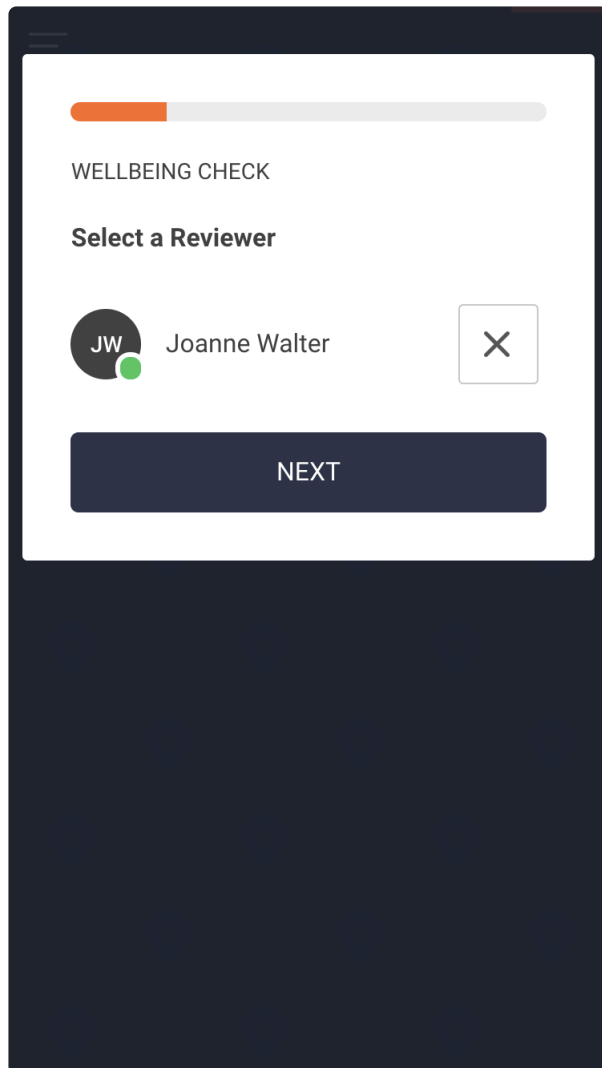
A mobile application interface on a dark blue background with a repeating pattern of small, lighter blue circular icons. At the top left is a white hamburger menu icon. A white rounded rectangle contains the following elements:

- Jeremy Martin**
- DESTINATION** Nebo QLD 4742, Australia
- ARRIVAL DATE** 09/02/2021 ▼
- Next** (button)

3. Select “Start Wellbeing Check”.

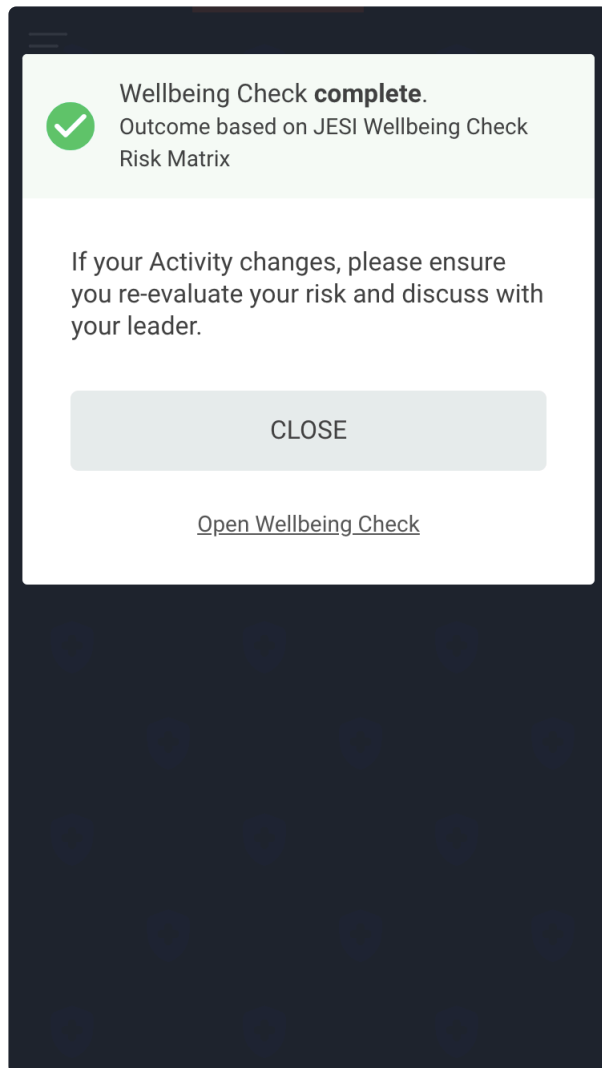


4. Type in the persons name who may be required to review the answers submitted. A Reviewer must have the appropriate permission level in JESI to be able to review i.e. Manager permission level providing they are in the same JESI team or an Administrator permission level, does not need to be in the same JESI team.

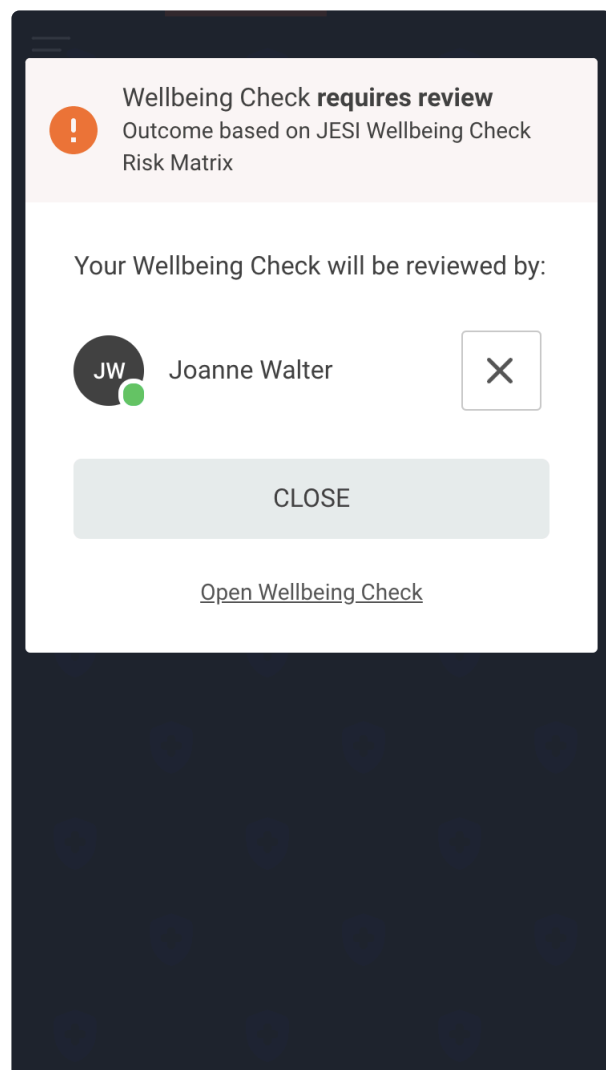


5. Answer the following series of questions.

Depending on answers submitted, the Wellbeing Check will be automatically approved, not requiring review. This will be identified as per the below image.



If the Wellbeing Check requires a review, your Wellbeing Check Reviewer will receive notification via SMS and email. This will be identified as per the below image.



If the Wellbeing Check has gone to Review, the Wellbeing Check Reviewer receives notification via SMS and email with a link to the Wellbeing answers submitted. When the Wellbeing Check has been reviewed a notification is sent back to the person who completed via SMS and email with a link to view any comments the Reviewer has added.

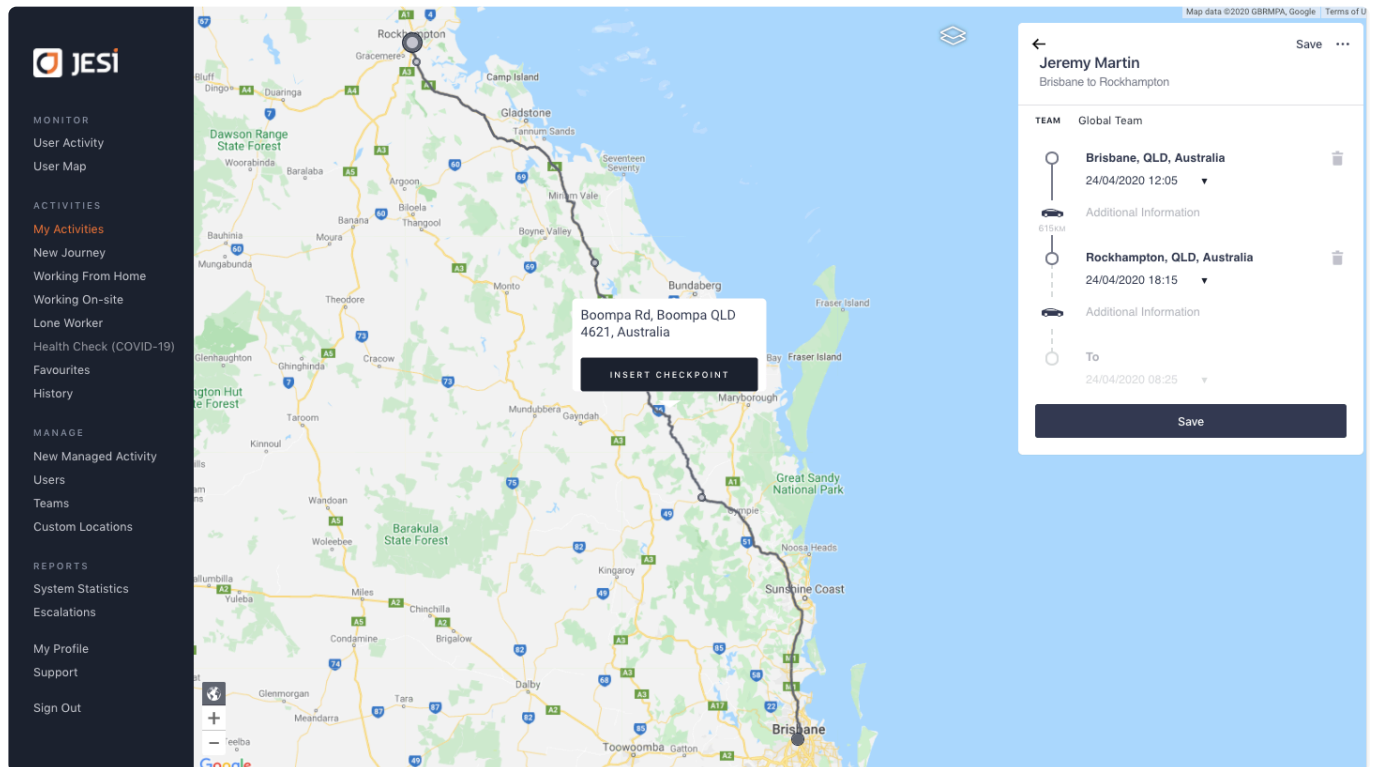
Be sure to follow organisational processes and procedures before travelling.

4.13. Completing a Risk Assessment (optional)

The Risk Assessment (RA) is an optional feature. If the JESI Company account does not have an active RA there is no need to complete the RA.

There are [four RAs available](#). All RAs follow the same initial process.

Add an Activity into JESI and press SAVE.



When you press the SAVE button this will automatically open the Risk Assessment for completion.

Risk Assessment Section: 1 of 1
Question: 1 of 9

Are you aware of safe travel practices to manage fatigue?
e.g. take regular rest breaks, stay hydrated

YES

NO

Depending on the RA JESI Company account has chosen to use, there may be a Manager approval required before the journey commences. The four RAs available are:

- [Work From Home Risk Assessment](#)
- [Basic Default Trip Risk Assessment](#)
- [Intermediate Trip Risk Assessment](#)
- [Advanced Trip Risk Assessment](#)

Please click on one of the above links to view the business rules associated with each RA.

To discuss activating a Risk Assessment for JESI Company account please contact customersuccess@jesims.com.au

4.13.1. Completing a Risk Assessment on behalf of a User

If you have the correct permission level in JESI you can complete the Risk Assessment on behalf of a User.

[Please click here for instructions.](#)

4.14. Viewing History

All users can view their previous Activity history, by simply clicking on 'History', found in the left-hand side menu.

The screenshot shows the JESI Activity History page. The left sidebar contains the following menu items: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The 'History' item is highlighted in orange. The main content area is titled 'Activity History' and displays a list of activities. Each activity card shows the title, status, start location, end location, and time. Below each card are buttons for 'VIEW', 'RECREATE', and 'ADD TO FAVOURITES'.

Activity Title	Status	Start Location	End Location	Time
Brisbane to Rockhampton	DELETED	Brisbane, QLD, Australia	Rockhampton, QLD, Australia	07:50, 28th Apr 2020 (UTC +10:00 AEST) 16:00, 28th Apr 2020 (UTC +10:00 AEST)
Brisbane to Townsville	CANCELLED	Brisbane, QLD, Australia	Townsville, QLD, Australia	16:25, 22nd Apr 2020 (UTC +10:00 AEST) 20:35, 22nd Apr 2020 (UTC +10:00 AEST)
Working From Home	DELETED	Leeson Street, Leeson St, Boondall QLD 4034, Australia	Leeson Street, Leeson St, Boondall QLD 4034, Australia	09:00, 23rd Apr 2020 (UTC +10:00 AEST) 17:00, 23rd Apr 2020 (UTC +10:00 AEST)
Brisbane to Mackay	DELETED			

This will show previous Activities entered into JESI Company account. Here in the Histories tab, you can also recreate a historical activity with the same start-finish location, stops, time and notes.

5. Managing an Escalation

Each Team set up in JESI has nominated Escalation Contacts.

An Escalation Contact will receive Escalation Notifications if a User in their Team fails to Check-In at the appointed time.

The 'Missed Check-In' notification is sent via SMS and email, with links to the Users' Activity in JESI.

The Escalation Contact can Check-In the User if they have made contact with them, or the User can Check-In themselves by replying to the SMS, or through the email Check-In online.

5.1. When a Missed Check-In Escalation Occurs

An SMS and email will automatically be delivered to an Escalation Contact to alert them that a User has not Checked-In. It is the responsibility of the Escalation Contact to follow organisational policies to ensure the User is safe.

The SMS and email contain a link to the User's Activity.

The Escalation Contact has the ability to amend the Activity, record notes or identify an Incident has occurred.

****IMPORTANT** – if a User is also an Escalation Contact and an Escalation occurs on their Activity they will not receive the Escalation Notification. The Escalation Notification will bypass to the next active Escalation Contact for that Team as per the Teams Escalation pathway.

[Click here to watch video.](#)

Text Message
Today 13:55

JESI: Jeremy Martin
[+61437044334](tel:+61437044334) missed check in at
Townsville. To view <https://tinyurl.com/y5tb66fy>



Text Message

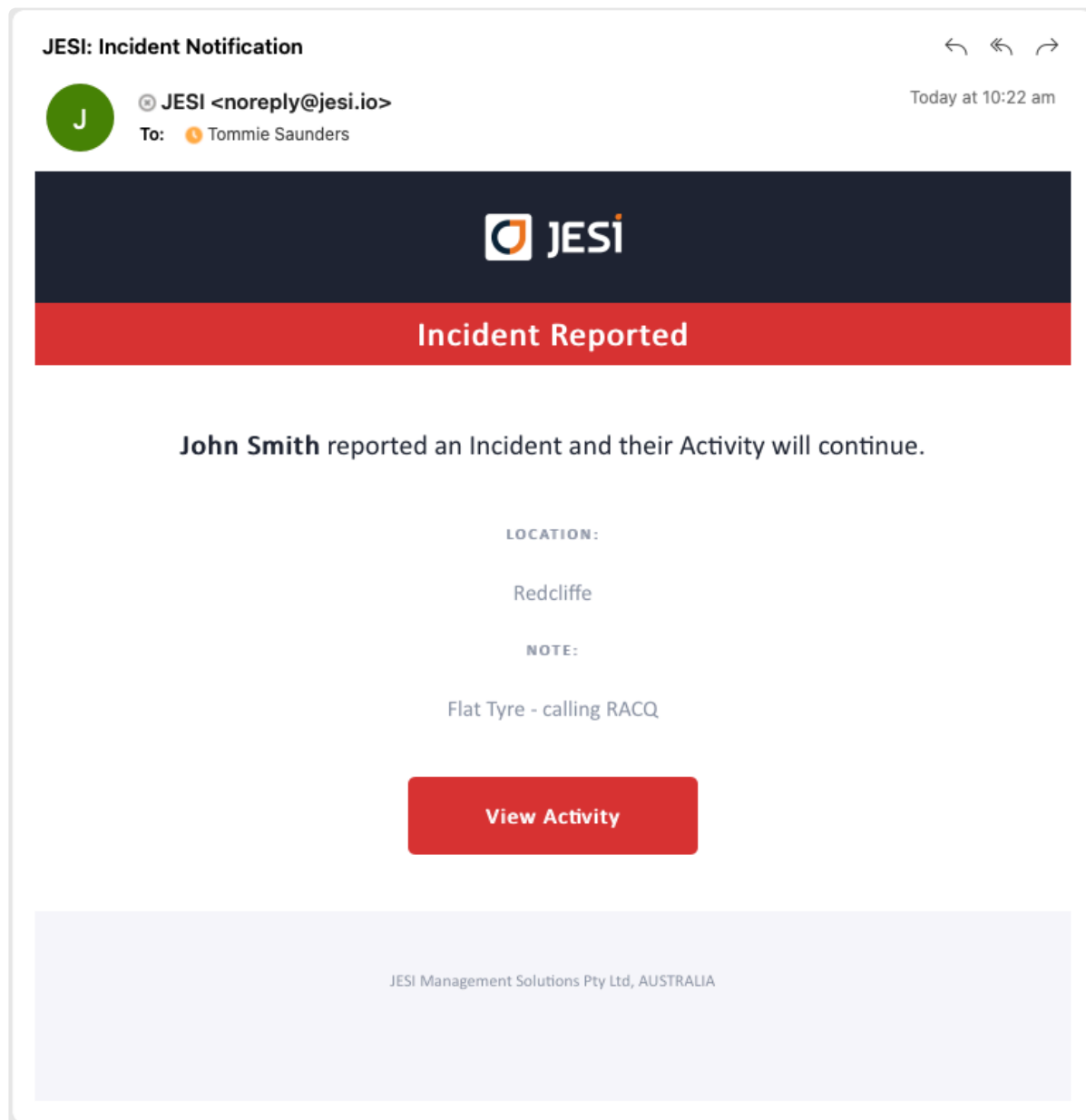


5.2. When an Incident Occurs

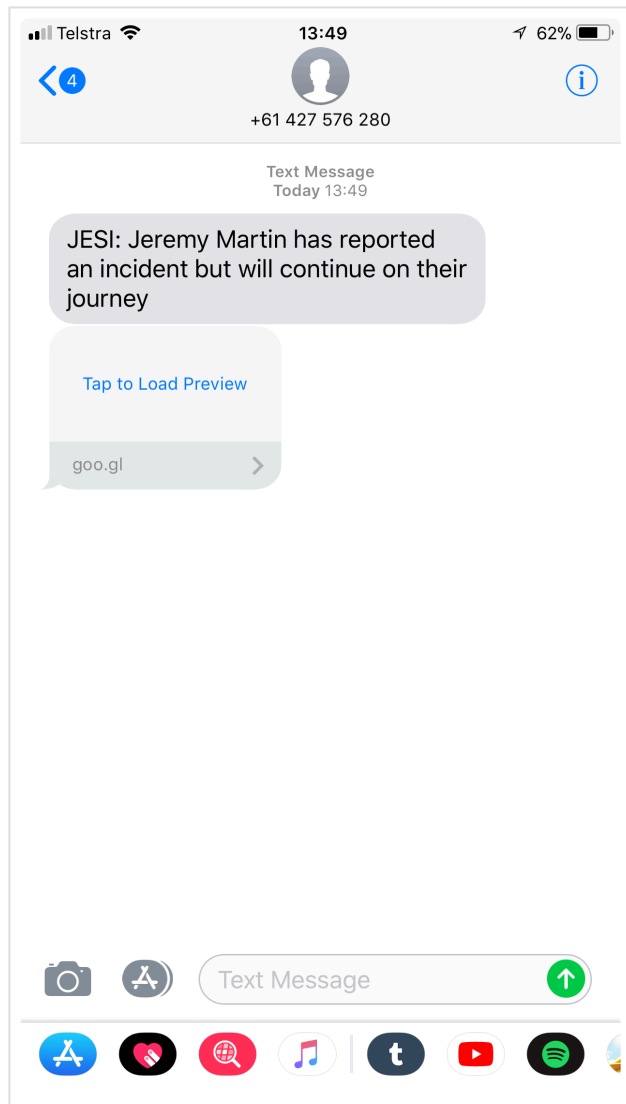
Incidents can be reported on an active Activity.

The Escalation Contacts associated with the User's Team will receive an Incident Notification via SMS and email.

Email Notification.



SMS Notification.



The Escalation Contact can view the Activity and the details that have been submitted.

**Redcliffe**

QLD 4020, Australia



Car Fleet

Planned Distance: 39km



Due in 5 minutes 8th Apr 10:30

Add a Note

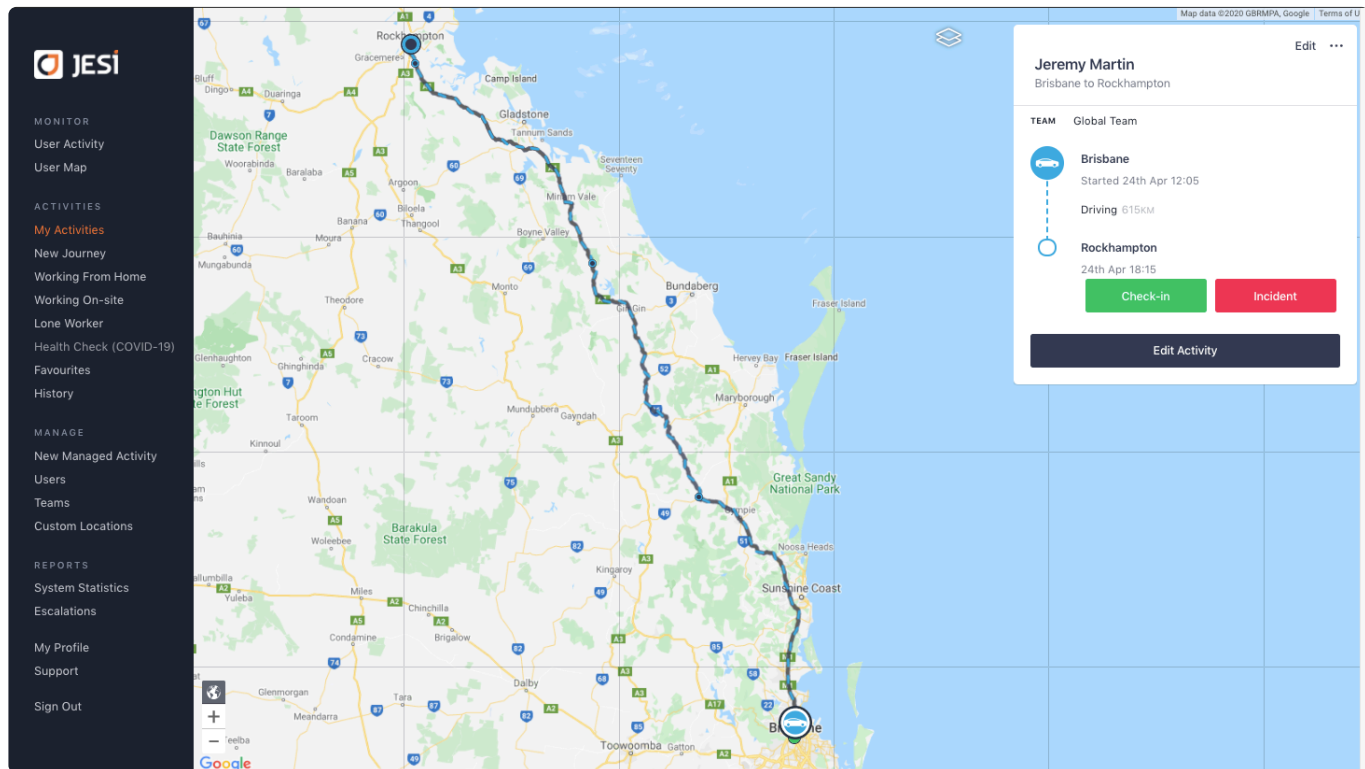
Submit

AUDIT LOG

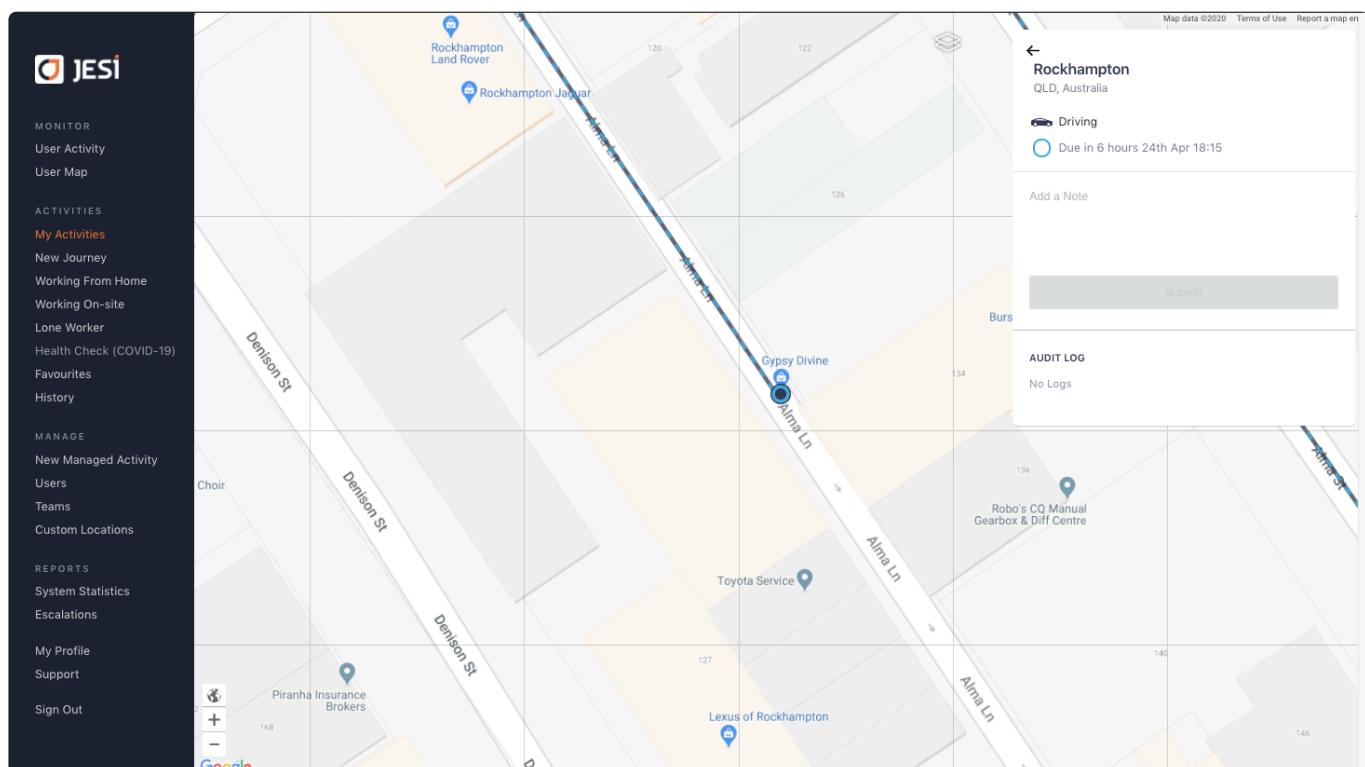
8th Apr 10:22	Incident SMS sent to Tommie Saunders on +61422159446
8th Apr 10:22	John Smith reported an incident Flat Tyre - calling RACQ
8th Apr 10:22	Incident email sent to Tommie Saunders on tommie.saunders@jesims.com.au
8th Apr 10:21	Incident SMS sent to Tommie Saunders on +61422159446

5.3. How to add Notes

Click on the Activity that may have an **Incident reported** or if you are required to Check-In on behalf of a User. Scroll to the Check-In with the Incident button.



Click on Check-In or the Incident button. When completing either of these actions for another User it is mandatory to add notes.



The notes that are added will appear in the Audit Log under that Check-In.

6. Managing a User's Activity

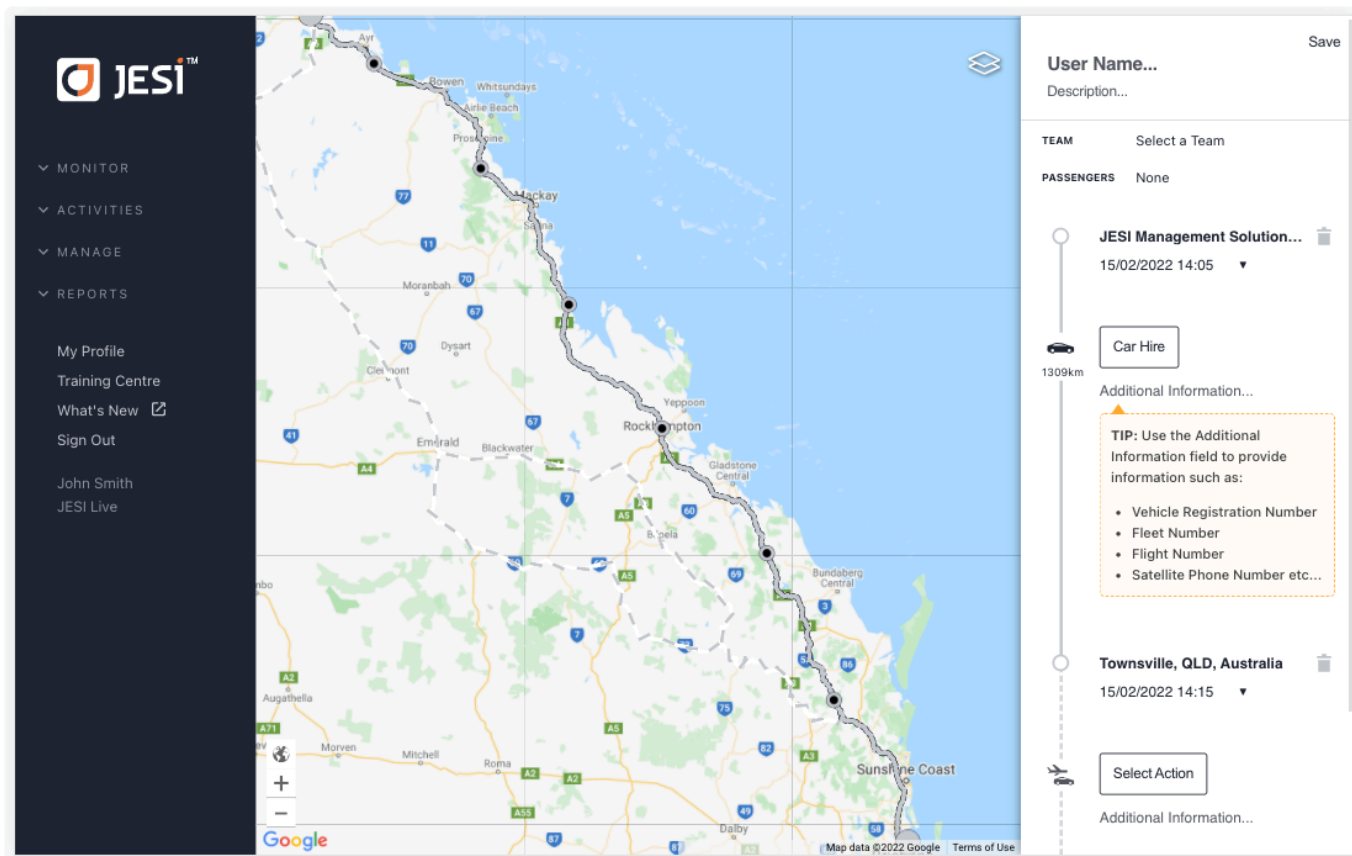
There are circumstances that require a User to process an Activity on behalf of another User. Only an Administrator, Manager or Monitor have the correct [permission levels](#).

6.1. Creating an Activity for a User with Route Planner

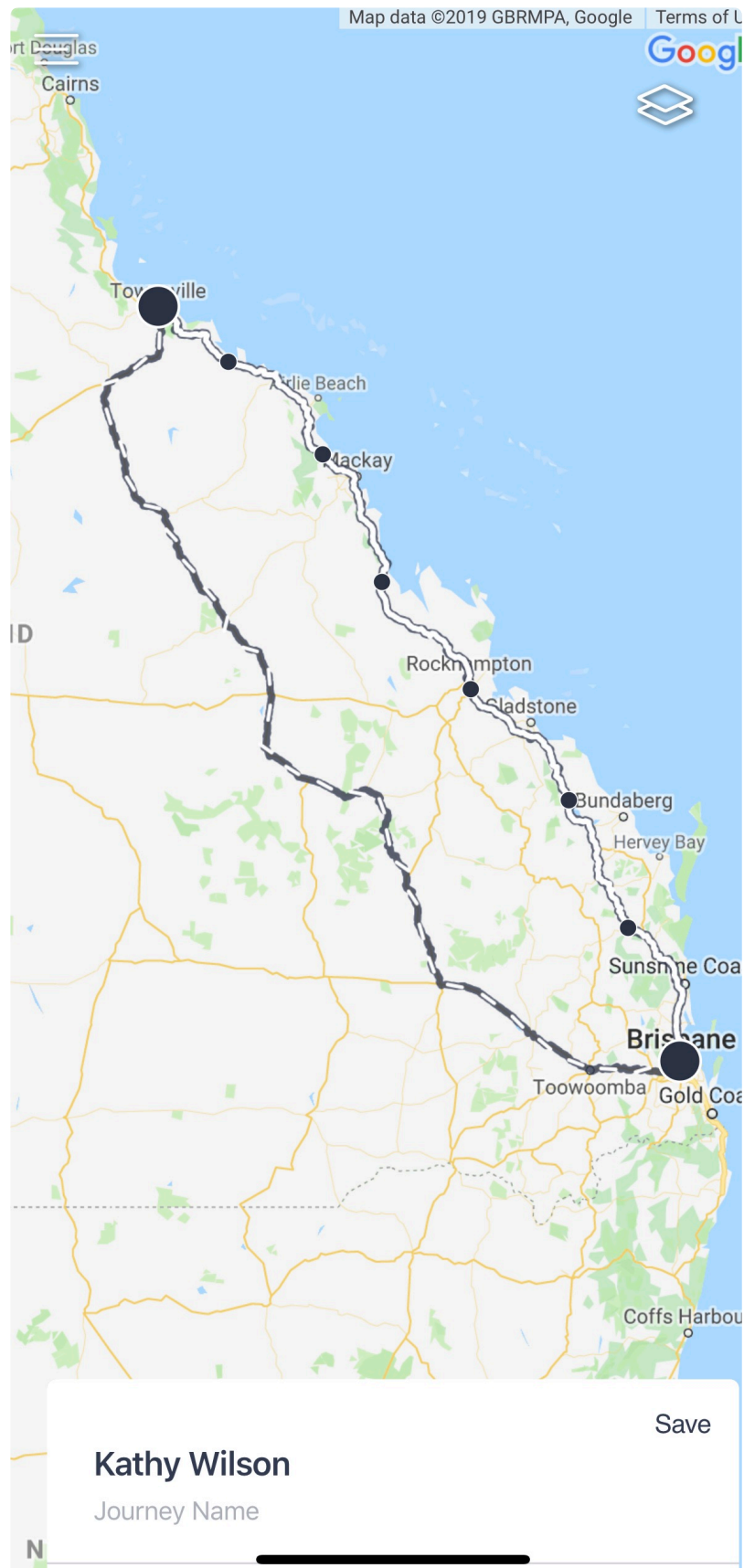
1. Click on 'New Managed Activity' found in the left hand side menu.**
2. In the area for User's Name type the first few letters and choose the User from the dropdown list of names available.

The screenshot displays the JESI management interface. On the left is a sidebar menu with sections: MONITOR (User Activity, User Map, User Wellbeing), ACTIVITIES (My Activities, New Journey (JMP), Working From Home, Working On-Site, Lone Worker, Wellbeing Check, Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (My Profile, Training Centre, What's New). The main area features a map of Australia with various locations marked. On the right, the 'New Managed Activity' form is shown for user 'John Smith'. The form includes fields for TEAM (Test001), PASSENGERS (None), From... (15/02/2022 04:00), and To... (15/02/2022 04:10). A 'Select Action' button is present. A tip box suggests using the 'Additional Information' field for details like Vehicle Registration Number, Fleet Number, Flight Number, and Satellite Phone Number. A 'Save' button is at the bottom right.

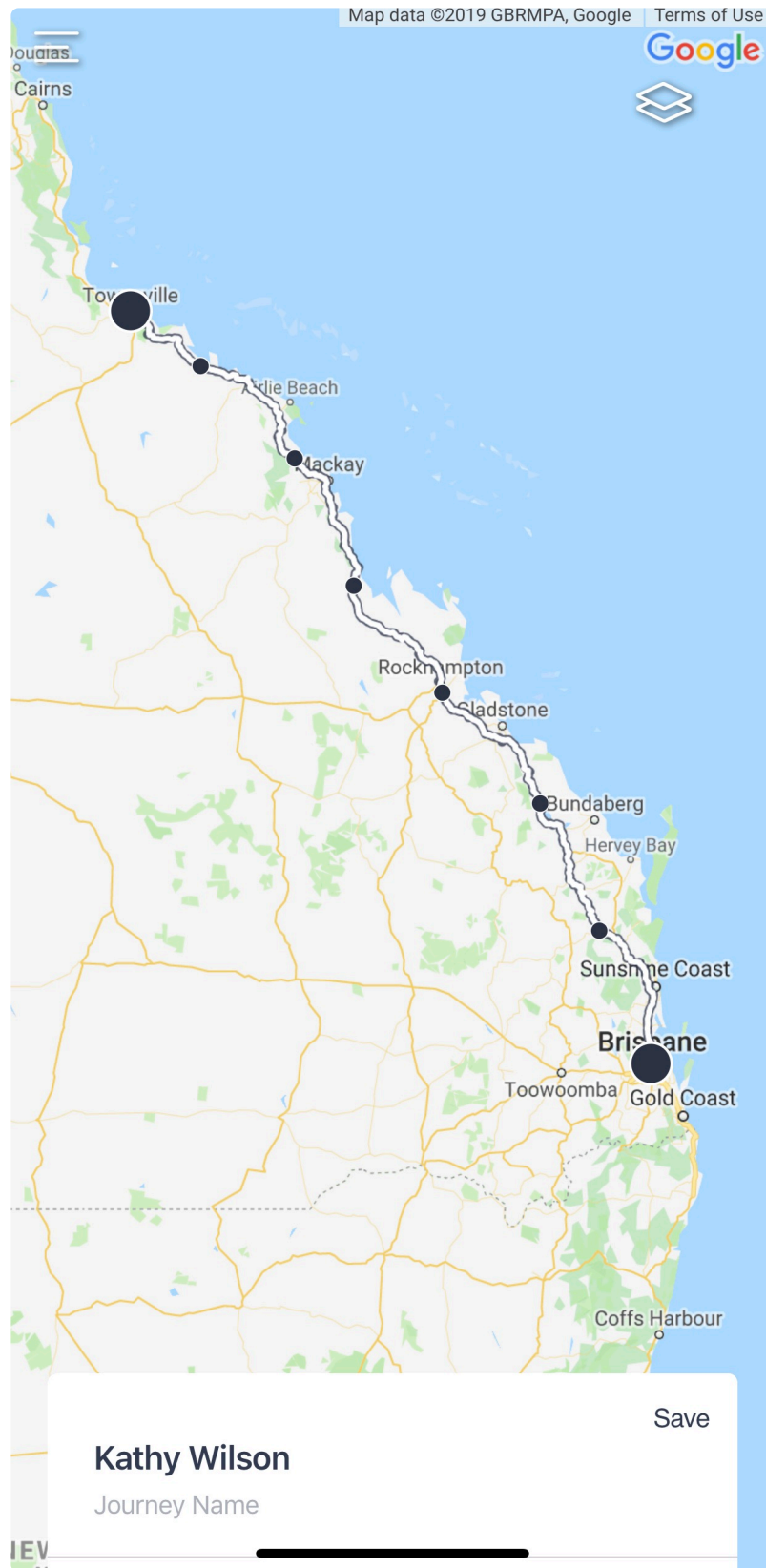
3. Check that the 'Team' is accurate.
4. Enter the 'Start Location'.
5. Enter the 'End Location'



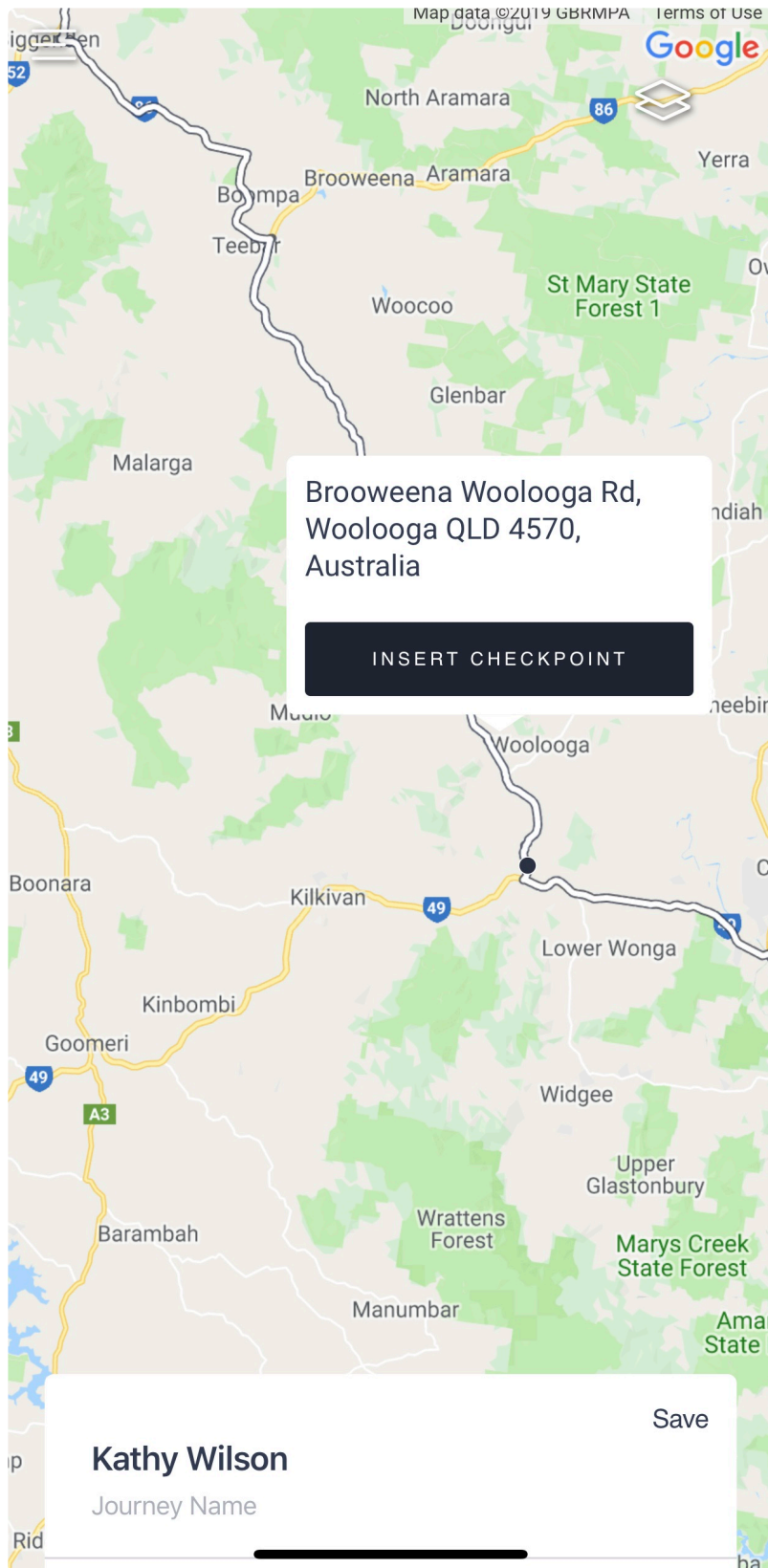
6. Select route. On mobile devices slide the screen down to show the routes available. Press next to name shown and slide downwards.



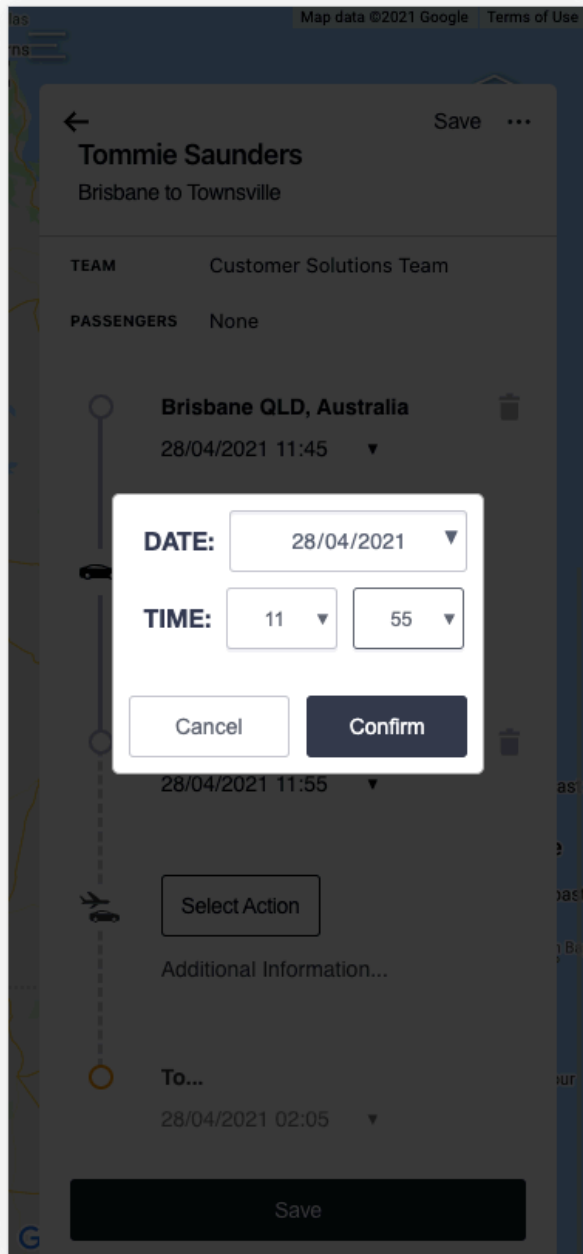
7. Choose route by pressing on one of the routes available. This will remove other routes available, leaving the chosen route with 200km distance markers on the route.



8. If there are Check-Ins along the way add these now manually or zoom in on the route, press on the location and insert a Check-In.



9. Modify time of arrival and date if necessary.



10. Click on 'Save Activity'

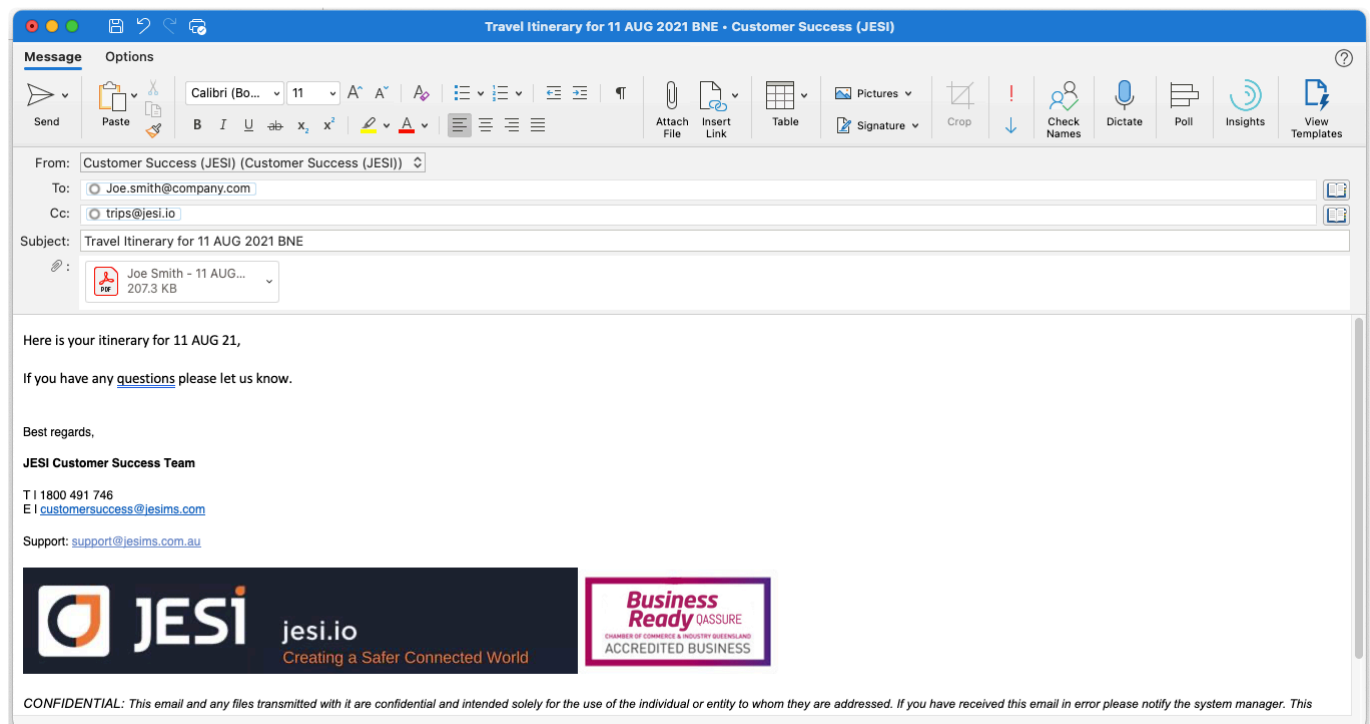
****NOTE:** The above has been completed on mobile device the same function can be completed on Desktop Computer.

6.2. Creating a User's Activity with a Travel Itinerary

An Activity can be uploaded from a travel itinerary on behalf of a User.

Attach the itinerary to a new email (ensure there is only one itinerary per email), leave the subject line blank and **email to the user and Cc trips@jesi.io** An email notification will be sent if the Activity has been created or rejected.

The example below is showing Jeremy Martin uploading the travel itinerary for Joe Hoolahan.



IMPORTANT INFORMATION

Only one itinerary can be uploaded per User per email.

If the Activity fails to upload – ensure the User has no other active Activities in JESI and that they are assigned to a Default team.

The itinerary **MUST** be future dated and cannot be retrospectively added to JESI.

6.3. Amending a User Activity

Go to the User Activity Dashboard and select the User's Activity that requires editing.

The screenshot shows the JESI User Activity Dashboard. The sidebar on the left includes sections for MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-Site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (My Profile, Support, Sign Out, Jeremy Martin, JESI). The top navigation bar has a search bar and filters for Teams, Actions, Statuses, and Default. A table of activities is displayed with columns: STATUS, USER, START LOCATION, START TIME, NEXT CHECK-IN, CHECK-IN TIME, and END LOCATION. The table contains several rows of activity data, including users like Alexander Scott, André de Jager, Michelle Ryan, and Luke Donnet, with their respective locations and check-in times.

On this page, available features include, editing Check-In times, adding Check-Ins or deleting future dated Check-Ins.

The screenshot shows the JESI User Activity Dashboard with a map view. The map displays a route from Brisbane to Rockhampton. The sidebar on the left includes sections for MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-Site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out, Jeremy Martin, JESI). The top navigation bar has a search bar and filters for Teams, Actions, Statuses, and Default. A modal window on the right shows the user's profile and activity details, including a calendar for April 2020. The modal window includes fields for TEAM (Global Team), location (Brisbane, QLD, Australia), and time (24/04/2020 12:05). It also has a section for Additional Information with a location (Boomba Rd, Boomba QLD 4621, Australia) and time (24/04/2020 14:45). A calendar for April 2020 is shown, with the 24th highlighted. At the bottom, there are fields for TIME (14:45) and buttons for Cancel and Confirm.

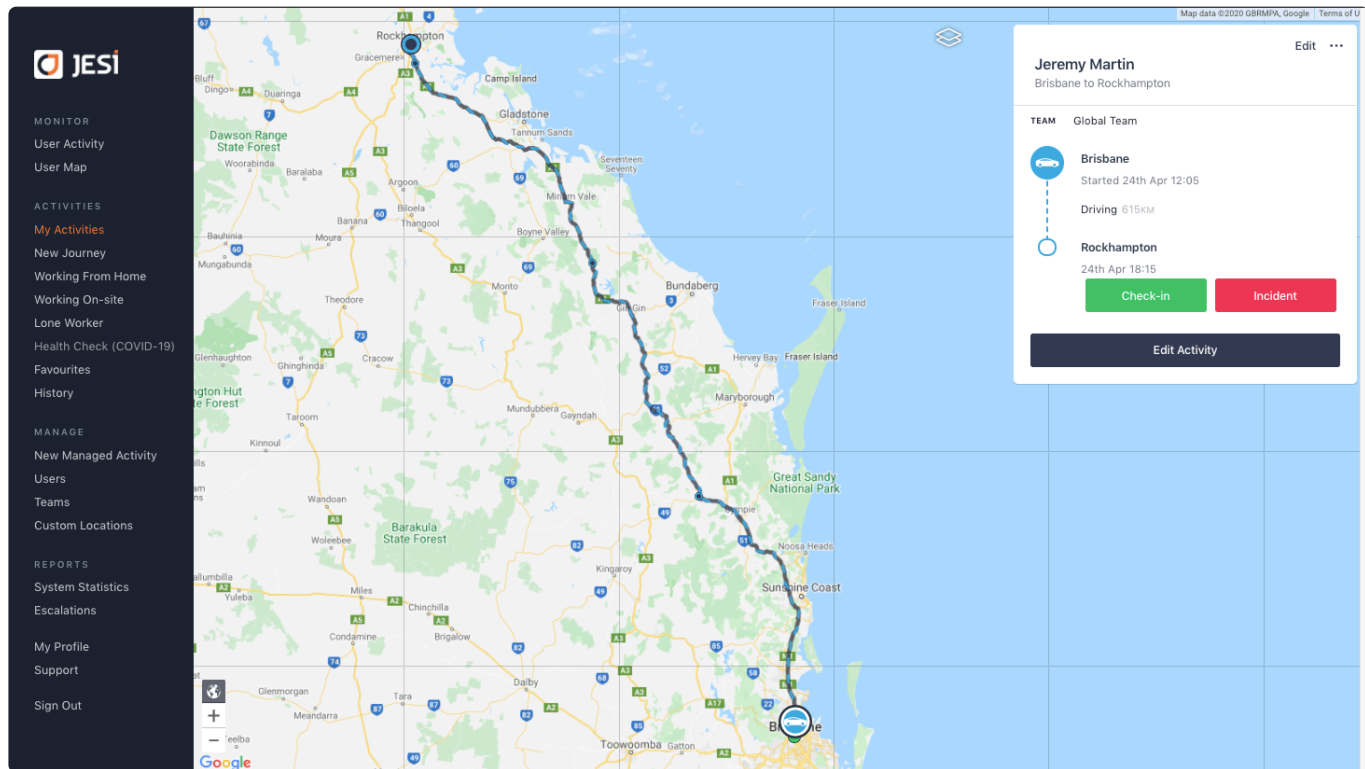
When happy with the changes simply press Save.

6.4. How to add notes for another User

Find the User Activity through the User Activity Dashboard.

Click into the Activity.

Click on the Check-In where a note is to be added.



Add notes and press Submit, the notes will be stored under the Check-In in the Audit Log.

MONITOR

User Activity

User Map

ACTIVITIES

My Activities

New Journey

Working From Home

Working On-site

Lone Worker

Health Check (COVID-19)

Favourites

History

MANAGE

New Managed Activity

Users

Teams

Custom Locations

REPORTS

System Statistics

Escalations

My Profile

Support

Sign Out

Map data ©2020 Terms of Use Report a map error

←

Rockhampton

QLD, Australia

Driving

Due in 6 hours 24th Apr 18:15

Add a Note

Submit

AUDIT LOG

No Logs

Rockhampton Land Rover

Rockhampton Jaguar

Gypsy Divine

Alma Ln

Denison St

Choir

Piranha Insurance Brokers

Toyota Service

Lexus of Rockhampton

Robo's CG Manual Gearbox & Diff Centre

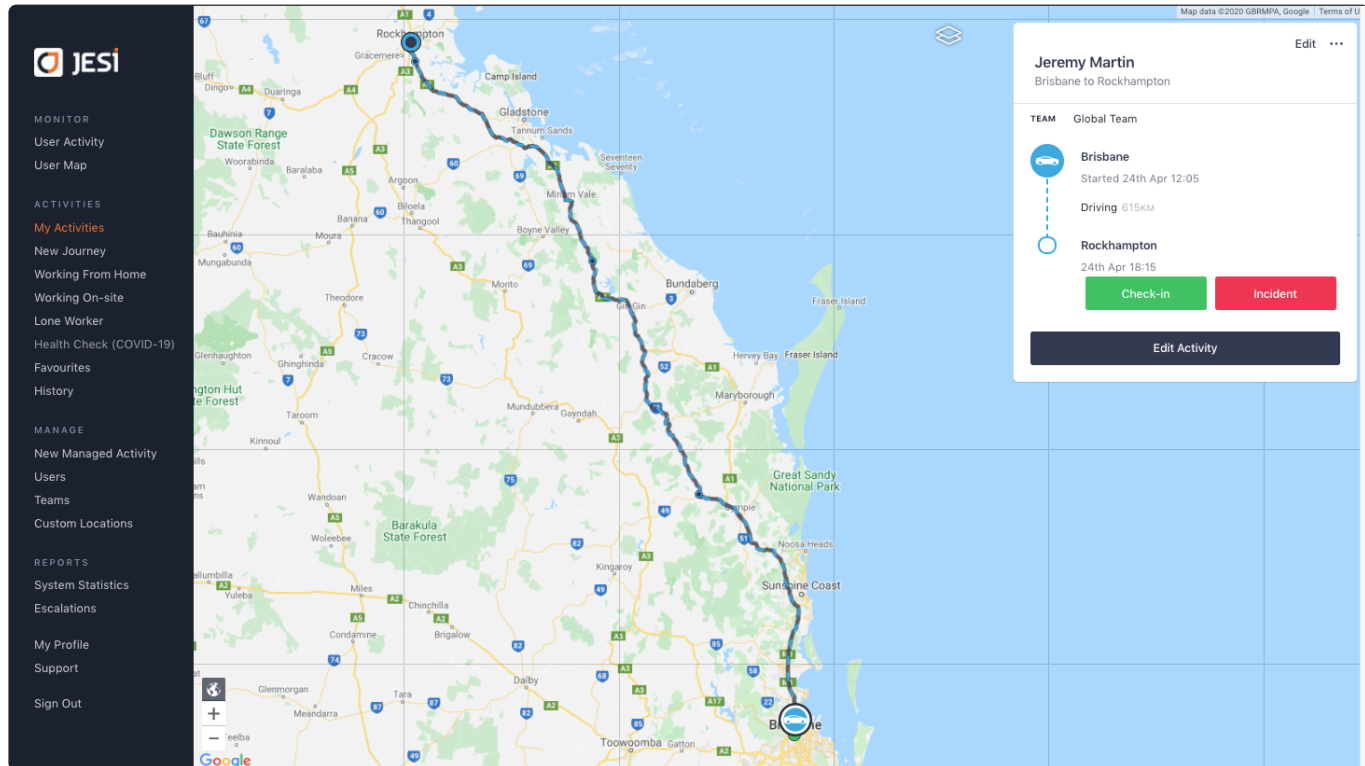
Copyright © 2022 JESI Management Solutions

Page 107 of 216

6.5. How to Check-In a User

Click on the User Activity Dashboard and find the User's Activity that requires to be Checked-In.

Click on the Activity.



Scroll down to the green Check-In button and select. When Checking-In a User on their behalf it is a requirement to leave a note as to why this action is being performed on behalf of the User.

[Click here to watch video How to Check-In a User and User Activity Dashboards.](#)

6.6. Managing a Risk Assessment on behalf of a User

If you have the correct permission level in JESI you can complete a Risk Assessment (RA) on behalf of a User.

Find the User's Pending Activity on the User Activity Dashboard.

The screenshot displays the JESI Management Solutions interface. On the left is a dark sidebar with the JESI logo and a navigation menu. The main area features a map with a highlighted orange polygon and a location pin labeled 'Visit Moreton Bay Region'. On the right, a panel for 'Jeremy Martin' shows his team 'Team Discover 1' and an 'Incomplete' risk assessment. A timeline lists two activities: 'JESI Management Solutions' at 24th Nov 13:40 and 'Car Fleet' at 24th Nov 20:30. An 'Edit Activity' button is at the bottom of the panel.

JESI Management Solutions

MONITOR

- User Activity
- User Map
- User Wellbeing

ACTIVITIES

MANAGE

REPORTS

COMPANY

My Profile
Training Centre
What's New
Sign Out

John Smith
JESI

Village Motors

427

Visit Moreton Bay Region

Miller St

Miller St

Miller St

Map data ©2021 Terms of Use Report a map error

Jeremy Martin
JESI Management Solutions to JESI Management Solutions

TEAM Team Discover 1

RISK ASSESSMENT Incomplete

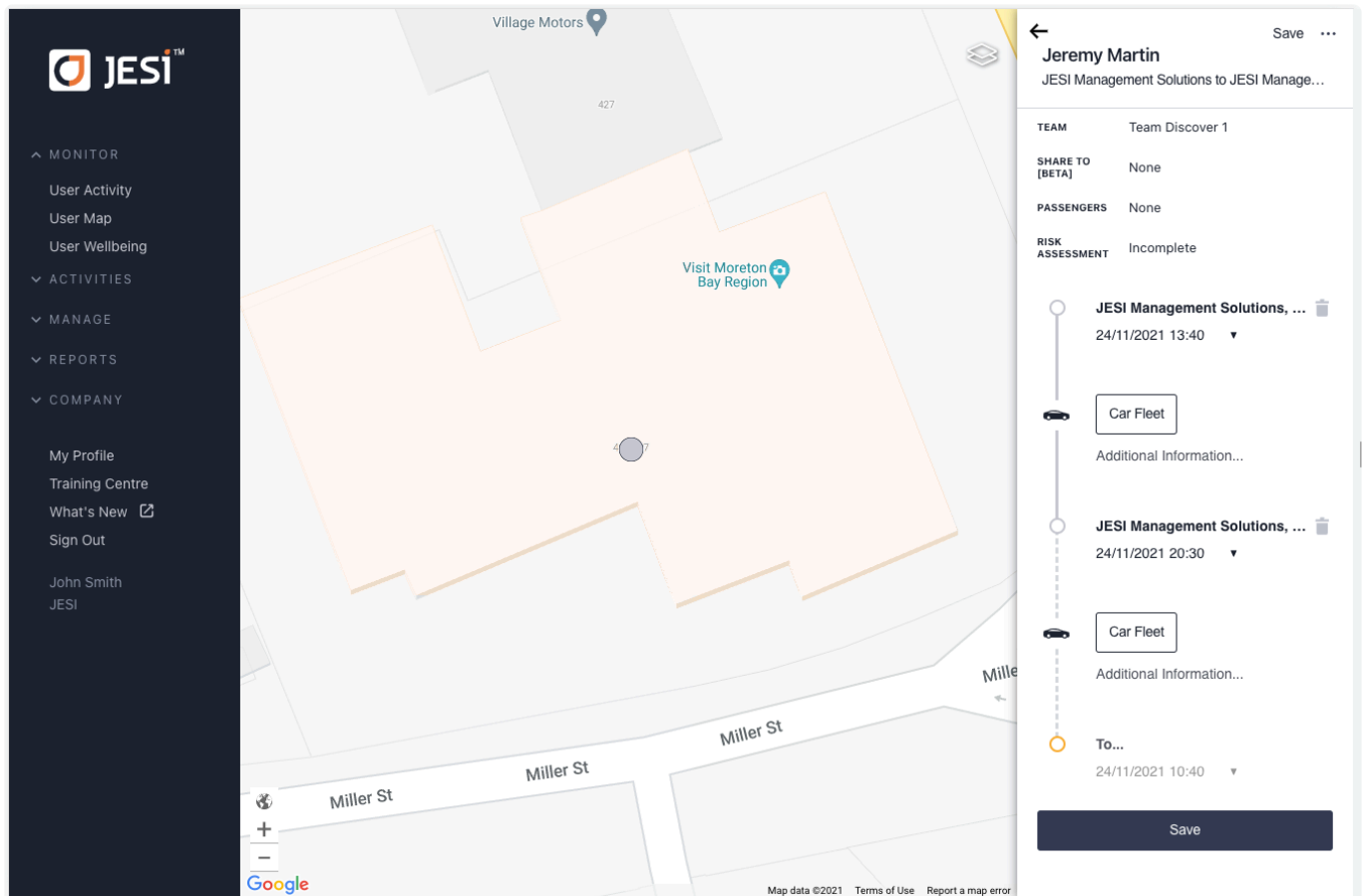
JESI Management Solutions
24th Nov 13:40

Car Fleet

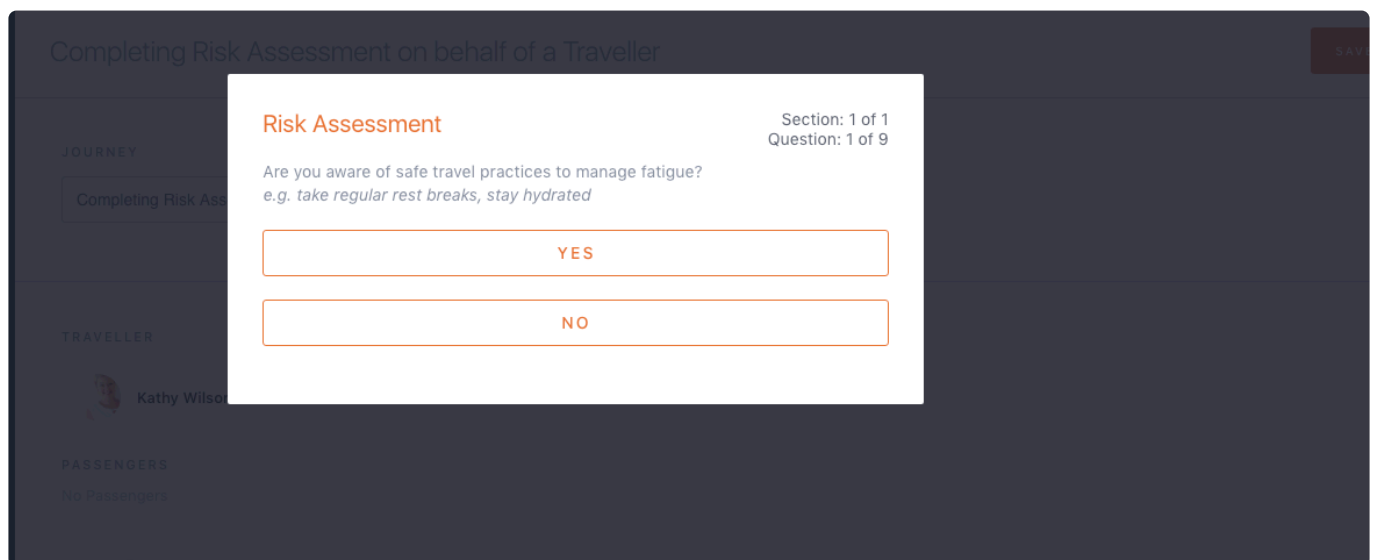
JESI Management Solutions
24th Nov 20:30

Edit Activity

Click into the Activity and press Edit Activity.



Click on the Risk Assessment button where it shows INCOMPLETE.



You can now complete the Risk Assessment on behalf of the User.

****Please note that if you are completing the RA on behalf of the User this must be actioned prior to the Activity commencing, failure to do so will result in the Activity cancelling at the time of commencement.**

6.7. Reviewing a Wellbeing Check and Permissions

The chosen Reviewer will receive an SMS and email notification with a link to the Wellbeing Check that requires review. A reviewer can only be selected if they have Manager User Role and are in the same JESI team as the User completing or if they have Administrator User Role.

1. Simply click on the link in the SMS or email.

Text Message
Today 14:29

STAGING: Tommie Saunders's
Wellbeing Check requires review
<https://tinyurl.com/yy35zg3m>

2. Review answers submitted, add notes and select “Mark as Reviewed”. This will send notification to the User who has submitted via SMS and email with a link to view the comments added.

No

Total Score: 8

Score Range	Outcome
0 - 0	Approved
1+	Review

Review

Ok to travel

MARK AS REVIEWED

Woody
Point QLD
08 Feb 21, 13:00

Joanne
Point QLD
07 Feb 21, 13:00

To view all Company Wellbeing Checks, this can be actioned via selecting User Wellbeing located in the left hand navigation.

The Wellbeing Check can be in one of three states.

Completed – the User has not answered any questions that have triggered the Wellbeing Check to go into a review state.

Review – the User has answered questions that identified the Wellbeing Check requires review however has not yet been reviewed.

Reviewed – the user has answered questions that identified the Wellbeing Check requires review and has been reviewed.

	STATUS	USER	DESTINATION	ARRIVAL DATE	SUBMITTED
MONITOR	Review	Tommie Saunders	Kippa-Ring QLD 4021, Australia	08 Feb 21	09 Feb 21, 14:29 (Australia/Brisbane)
User Activity	Review	Jeremy Martin	Nebo QLD 4742, Australia	08 Feb 21	09 Feb 21, 13:59 (Australia/Brisbane)
User Wellbeing	Review	Luke Donné	Townsville QLD, Australia	09 Feb 21	09 Feb 21, 10:29 (Australia/Brisbane)
User Map	Review	Luke Donné	Townsville QLD, Australia	31 Jan 21	01 Feb 21, 15:39 (Australia/Brisbane)
ACTIVITIES	Review	Luke Donné	Townsville QLD, Australia	12 Feb 21	01 Feb 21, 15:38 (Australia/Brisbane)
MANAGE	Completed	Jeremy Martin	Nebo QLD 4742, Australia	08 Feb 21	09 Feb 21, 14:04 (Australia/Brisbane)
REPORTS	Reviewed	Luke Donné	Townsville QLD, Australia	09 Feb 21	09 Feb 21, 10:42 (Australia/Brisbane)
COMPANY	Reviewed	Joanne Walter	Woody Point QLD 4019, Australia	07 Feb 21	08 Feb 21, 13:09 (Australia/Brisbane)
	Reviewed	Jeremy Martin	125 Sheffield Rd, Welshpool WA 6106, Australia	08 Feb 21	08 Feb 21, 11:30 (Australia/Brisbane)
My Profile	Reviewed	Joanne Walter	Rise St, Mount Gravatt East QLD 4122, Australia	07 Feb 21	08 Feb 21, 11:27 (Australia/Brisbane)
Training Centre	Reviewed	Joanne Walter	Brisbane QLD, Australia	07 Feb 21	08 Feb 21, 11:20 (Australia/Brisbane)
What's New	Completed	Tommie Saunders	Redcliffe QLD 4020, Australia	08 Feb 21	08 Feb 21, 11:16 (Australia/Brisbane)
Sign Out	Reviewed	Tommie Saunders	Redcliffe QLD 4020, Australia	08 Feb 21	08 Feb 21, 11:14 (Australia/Brisbane)
Jeremy Martin	Reviewed	Luke Donné	Townsville QLD, Australia	07 Feb 21	08 Feb 21, 11:07 (Australia/Brisbane)
JESI	Completed	Luke Donné	Townsville QLD, Australia	07 Feb 21	08 Feb 21, 11:03 (Australia/Brisbane)
	Completed	Luke Donné	Townsville QLD, Australia	06 Feb 21	07 Feb 21, 13:57 (Australia/Brisbane)

7. Risk Assessments (RA Optional)

A Risk Assessment (RA) is a tool that enables Users to answer a series of questions that may identify hazards or risks associated with their intended Activity.

Users can complete an online, interactive Risk Assessment prior to commencing an Activity.

There are four Risk Assessments available. Three Trip Risk Assessments (TRA) and one Work From Home Risk Assessment;

1. Work From Home – no manager approval.

Trip Risk Assessments

1. Basic Default – no manager approval.
2. Intermediate Default – manager approval and the ability for the User to choose the Reviewer.
3. Advanced Default – risk matrix attached to a series of questions. If the risk is deemed acceptable, instant approval for Activity to start. If the risk is deemed higher, manager approval required. Notifications sent to Escalation Contact via SMS and email for approval.

If a Risk Assessment is not enabled for the JESI Company Account or you would like to discuss customising a Risk Assessment for your Company please contact a [JESI Customer Solutions Representative](#).

7.1. How to Add a Risk Assessment

Risk Assessments (RA) are located within each Team (if a RA has been enabled to the JESI Company Account).

To have a Risk Assessment added to the JESI Company Account please contact our [Customer Solutions Team](#).

If a Risk Assessment is activated for your JESI Company Account, it will need to be added to all relevant Teams.

Go to 'Teams' found in the left hand side menu and select the Team/s that requires a Risk Assessment.

The screenshot shows the JESI Teams management interface. On the left is a dark sidebar with the JESI logo and a menu with categories: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The 'Teams' option is highlighted in orange. The main area has two search bars: 'Search Team' and 'Search Member or Escalation Contact'. A dropdown shows '2 Statuses Selected'. A 'NEW TEAM' button is in the top right. The table below lists teams and their RA status across different time intervals.

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES
Alexander Drilling	✓	●	●				
Default Advanced TRA (V2)	✓	●	●				
Default Basic TRA	✓	●	●	●			
Default Intermediate TRA	✓	●	●	●			
Devs - ATSys Intermediate TRA	✓						
Devs - Advanced TRA	✓	●	●	●			
Devs - Conditional WFH	✓	●					
Devs - EW Surat Basin TRA	✓	●					
Devs - Intermediate TRA	✓	●					
Devs - No TRA		●					●
Devs - PQ Customised Advanced Drilling Devs	✓	●	●	●			
Devs - Projects JMP	✓	●	●				
Devs - RTGI Basic TRA	✓	●					
Devs - RTIO TRA	✓	●	●				

Click EDIT TEAM.

Search Team Search Member or Escalation Contact 2 Statuses Selected

NEW TEAM

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES	60 MINUTES
Alexander Drilling	✓	✓	●	●				
Default Advanced TRA (V2)	✓	●	●					

RISK ASSESSMENTS EDIT TEAM

MEMBERS

MEMBERS	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES	60 MINUTES
Jeremy Martin	●	●					
Joanne Walter							
Joe Hoolahan							
Joe Hoolahan ~...							
Kathy Wilson							
Luke Donné							
Michelle Ryan							

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES	60 MINUTES
Default Basic TRA	✓	●	●	●				
Default Intermediate TRA	✓	●	●	●				
Devs - ATSys Intermediate TRA	✓							
Devs - Advanced TRA	✓	●	●	●				
Devs - Conditional WFH	✓	●						
Devs - EW Surat Basin TRA	✓	●						
Devs - Intermediate TRA	✓	●						
Devs - No TRA		●					●	●
Devs - PQ Customised Advanced Drilling Devs	✓	●	●	●				

On the right hand side select the Risk Assessment from the dropdown menu, and press SAVE.

Edit Team DEACTIVATE SAVE

TEAM NAME Default Advanced TRA (V2)

TRAVEL RISK ASSESSMENT Default Advanced TRA (V2)

WORKING FROM HOME RISK ASSESSMENT Risk Assessment Not Required

ESCALATION LEVELS

5 minutes after Check-In

Add an Escalation Contact

PM Phil Martin REMOVE

10 minutes after Check-In

Add an Escalation Contact

JM Jeremy Martin REMOVE

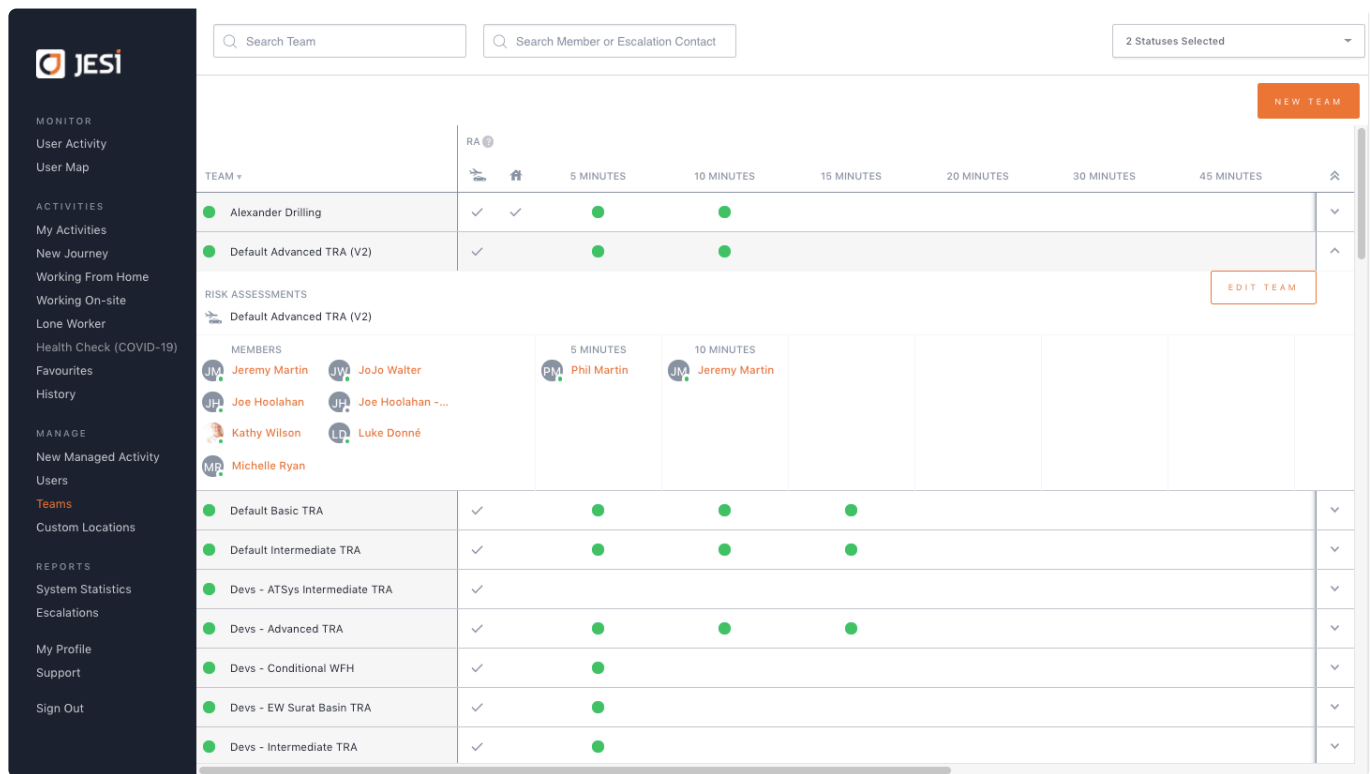
DELETE LEVEL

ADD ESCALATION LEVEL

The Risk Assessment will now be active.

7.2. How to Deactivate a Risk Assessment

Click on 'Teams' found in the left hand side menu and select the Team/s for which you wish to deactivate the Risk Assessment (RA). Press EDIT TEAM.



The screenshot shows the JESI Teams page. On the left is a dark sidebar with navigation menus: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The main area has search bars for 'Search Team' and 'Search Member or Escalation Contact', and a dropdown for '2 Statuses Selected'. Below is a table of teams with columns for TEAM, RA (with icons for 5, 10, 15, 20, 30, 45 minutes), and an RA status dropdown. The 'Default Advanced TRA (V2)' team is highlighted. An 'EDIT TEAM' button is visible next to it.

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES	RA
Alexander Drilling	✓	✓	●	●				▼
Default Advanced TRA (V2)	✓	●	●					▲

RISK ASSESSMENTS

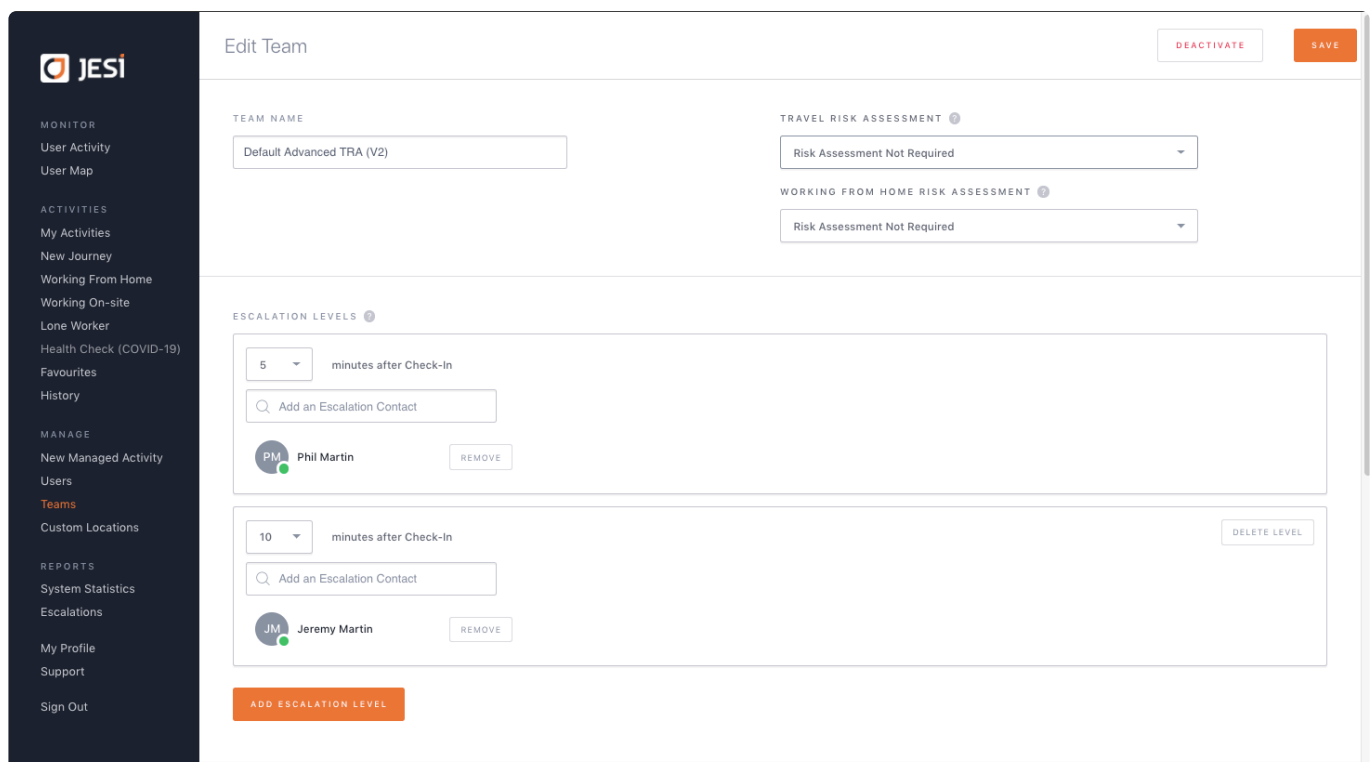
Default Advanced TRA (V2)

MEMBERS

- Jeremy Martin (JM)
- JoJo Walter (JW)
- Phil Martin (PM)
- Joe Hoolahan (JH)
- Joe Hoolahan - ... (JH)
- Kathy Wilson (KW)
- Luke Donné (LD)
- Michelle Ryan (MR)

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES	RA
Default Basic TRA	✓	●	●	●				▼
Default Intermediate TRA	✓	●	●	●				▼
Devs - ATSys Intermediate TRA	✓							▼
Devs - Advanced TRA	✓	●	●	●				▼
Devs - Conditional WFH	✓	●						▼
Devs - EW Surat Basin TRA	✓	●						▼
Devs - Intermediate TRA	✓	●						▼

From the Risk Assessment dropdown menu on the right hand side choose the top option 'No RA Required' and press SAVE.



The screenshot shows the 'Edit Team' page for 'Default Advanced TRA (V2)'. It has buttons for 'DEACTIVATE' and 'SAVE'. The 'TRAVEL RISK ASSESSMENT' dropdown is set to 'Risk Assessment Not Required'. The 'WORKING FROM HOME RISK ASSESSMENT' dropdown is also set to 'Risk Assessment Not Required'. Below, the 'ESCALATION LEVELS' section shows two levels: 5 minutes after Check-In with Phil Martin and 10 minutes after Check-In with Jeremy Martin. Each level has a 'REMOVE' button. An 'ADD ESCALATION LEVEL' button is at the bottom.

Edit Team

TEAM NAME: Default Advanced TRA (V2)

TRAVEL RISK ASSESSMENT: Risk Assessment Not Required

WORKING FROM HOME RISK ASSESSMENT: Risk Assessment Not Required

ESCALATION LEVELS

- 5 minutes after Check-In
 - Phil Martin (PM) [REMOVE]
- 10 minutes after Check-In
 - Jeremy Martin (JM) [REMOVE]

ADD ESCALATION LEVEL

This will deactivate the Risk Assessment for this team.

7.3. Basic Trip Risk Assessment

A Basic Trip Risk Assessment (TRA) is a series of yes or no questions the User needs to complete before their Activity commences. The questions are designed to prompt the User to think about the risks associated with the Activity they are undertaking.

[Click here to watch video.](#)

Example of questions.

The screenshot shows a mobile application interface for a 'Risk Assessment'. The title 'Risk Assessment' is at the top left. The progress indicator 'Section: 1 of 1' and 'Question: 1 of 9' is at the top right. The question text is 'Are you aware of safe travel practices to manage fatigue?' followed by an example: 'e.g. take regular rest breaks, stay hydrated'. Below the question are two large, outlined buttons labeled 'YES' and 'NO'. The background is dark grey with some blurred text from other parts of the app visible.

The screenshot shows the same 'Risk Assessment' interface, but for 'Question: 2 of 9'. The question text is 'Are you appropriately trained and authorised to undertake this journey and manage its risks?' followed by an example: 'e.g. correct licenses, authorisations, equipment training'. Below the question are two large, outlined buttons labeled 'YES' and 'NO'. The background is dark grey with some blurred text from other parts of the app visible.

If the Basic TRA is not enabled for the JESI Company Account or more information is required please contact the [Customer Solutions Team](#).

A Basic TRA does not require a Reviewer to approve or deny.

[Click HERE for Basic TRA Guide Questions](#)

****Basic Trip Risk Assessment not available on JESI Starter.**

7.3.1. Business Rules Basic Trip Risk Assessment

The Trip Risk Assessment (TRA) is assigned at the Team level, and if a User is assigned to that Team, the TRA is a mandatory requirement to complete before their Activity commences. Failing to complete the TRA will result in the Activity being cancelled at the departure time. The User and the Escalation Contact will receive an SMS and email notification advising that the Activity has been cancelled.

The User will receive a 24hour and 1hour reminder by SMS and email prior to the Activity commencing.

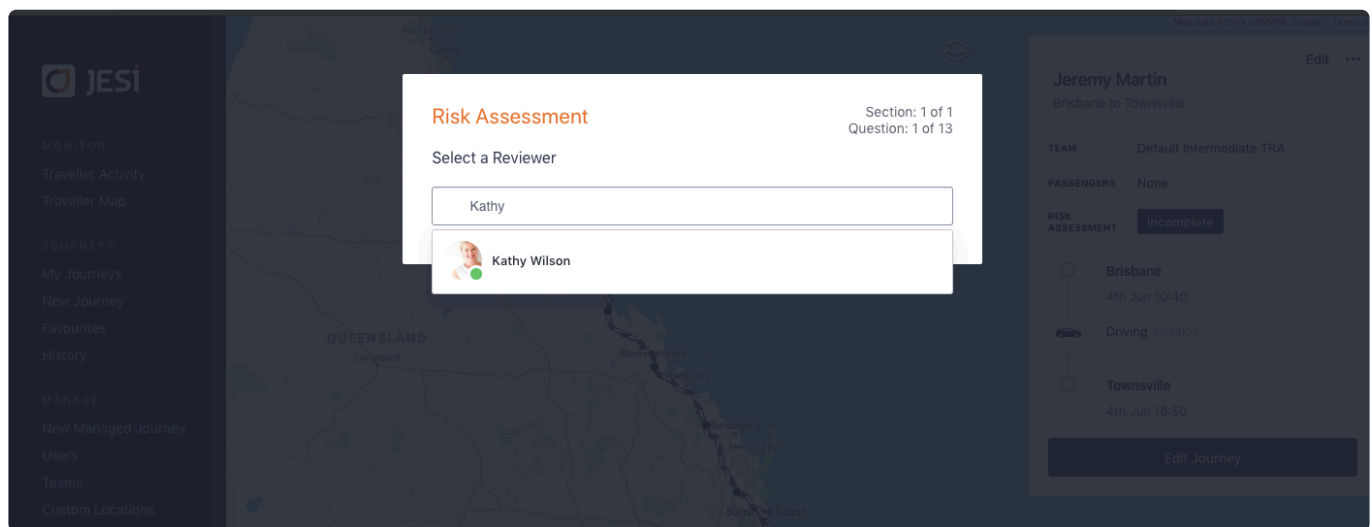
7.4. Intermediate Trip Risk Assessment

An Intermediate Trip Risk Assessment (TRA) is a series of yes or no questions the User is to complete before their Activity commences. The TRA is associated with a Manager approval process where the User can choose who in the JESI Company Account needs to approve the Activity before the Activity commences. The Reviewer/Approver must be an active User in the JESI Company Account with the correct permission levels.

[Click here to watch video.](#)

Choosing Reviewer.

Type the first few letters of the Reviewers name and select from the dropdown menu.



The questions are designed to prompt the User to think about the risks associated with the Activity they are undertaking and request approval before the Activity commences.

If the TRA is not enabled for the JESI Company Account or you would like to know more, please contact our [Customer Solutions Team](#).

[Click HERE for Intermediate TRA Guide Questions](#)

****Intermediate Trip Risk Assessment not available on JESI Starter.**

7.4.1. How to Review an Intermediate Trip Risk Assessment

The chosen Reviewer will receive an SMS and email notification with a link to the Activity that requires approval.

Simply click on the link.

This will open the answers the User has submitted. It is the Reviewers responsibility to approve or deny the Activity entered. When approving or denying the Activity, it is mandatory to add notes as to why the Reviewer is approving or denying the Activity. The notes will be sent, along with the approved or denied outcome, to the User via SMS and email.

The Reviewer must approve or deny the Activity before the Activity is to commence. Failing to review the Activity, will result in the Activity being cancelled at the time it is due to start. The User will receive notification via SMS and email that the Activity has been cancelled due to the Activity not being reviewed.

IMPORTANT

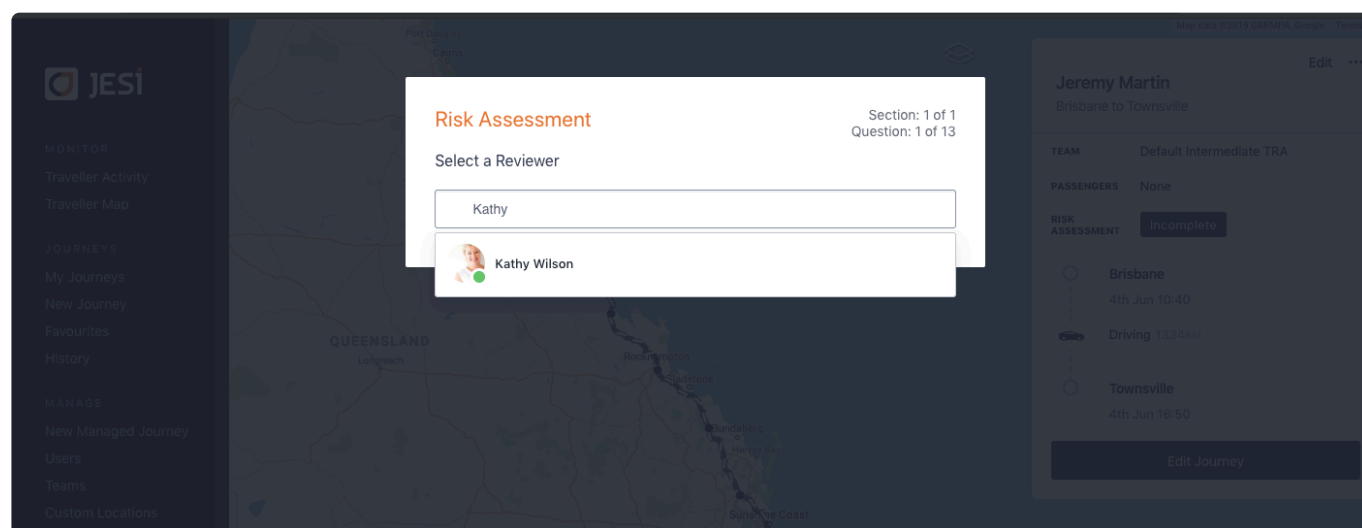
The Reviewer must have an activated account in JESI to review an Activity.

[Click here to watch video.](#)

7.4.2. Business Rules Intermediate Trip Risk Assessment

The Intermediate TRA is assigned at the Team level, and is mandatory for all Users that are in that team, to complete, before their Activity commences. Failing to complete the TRA will result in the Activity being cancelled at the departure time. The User and the Users' Reviewer will receive an SMS and email notification advising that the Activity has been cancelled.

Enter an Activity into JESI and press SAVE. This will take the User to a screen that will require them to select a Risk Assessment Reviewer.



After choosing the Reviewer, a series of questions pertaining to the Activity will open and require answering. Once the User completes the answers, a notification will be sent to the Reviewer for approval or denial.

The Reviewer will receive an SMS and email notification with a link to the answers submitted. The Reviewer has the option to approve or deny the Activity. The User will be notified of the outcome via SMS and email.

A 24hour and 1hour reminder will automatically be sent to the User by SMS and email, before the Activity commences, that a TRA completion is required.

7.5. Advanced Trip Risk Assessment

The JESI Advanced Trip Risk Assessment (TRA), is a series of questions that the User is to complete before their Activity commences. The Advanced TRA is associated with a Manager approval process and answers submitted by the User will either automate an Activity approval or enter it into a workflow approval process.

The Advanced TRA has a predetermined Scoring Risk Matrix in the background that will determine if the Activity needs to be reviewed or if it is automatically approved. Both Reviewer and User will receive communication via SMS and email throughout the entire flow.

The questions are designed to prompt the User to think about the risks associated with the Activity they are undertaking and request approval before the Activity commences if the risk is deemed to be high.

If the TRA is not enabled for the JESI Company Account or you would like to know more, please contact our [Customer Solutions Team](#).

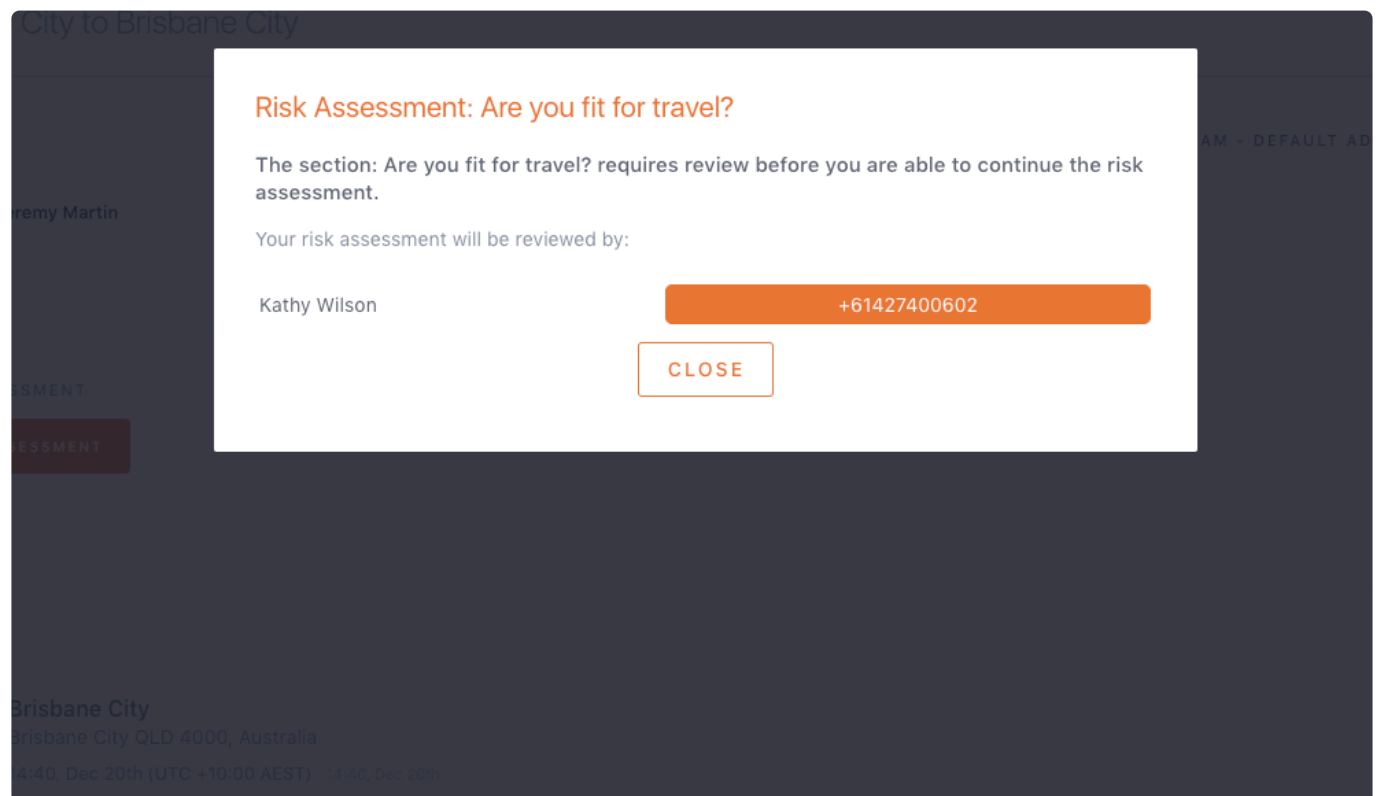
[Click HERE for Advanced TRA Guide Questions](#)

[Click here to watch video.](#)

**Advanced Trip Risk Assessment not available on JESI Starter.

7.5.1. How to Review an Advanced Trip Risk Assessment

If the Users' Trip Risk Assessment is not automatically approved the Users' second Escalation Contact (Reviewer) will receive an SMS and email notification with a link to the Activity that requires approval.



Simply click on the link.



Risk assessment for Jeremy Martin's journey from Brisbane City at 14:40, 20 Dec 2017, to Brisbane City on 17:40, 20 Dec 2017 requires review.

To view further details click the button below:

[VIEW THE JOURNEY →](#)

JESI Management Solutions Pty Ltd, PO Box 8212, Garbutt QLD 4814, AUSTRALIA

This will open the answers the User has submitted. It is the Reviewers' responsibility to approve or deny the Activity entered. When approving or denying the Activity it is mandatory to add notes as to why the Reviewer is approving or denying the Activity. The notes will be sent, along with the approved or denied outcome, to the User via SMS and email.

100 - 200km

~~200 - 300km~~

~~300 - 400km~~

~~400km+~~

Current Awake Time + Expected Travel Time

~~14+ hours~~

~~12 to 14 hours~~

10 to 12 hours

~~8 to 10 hours~~

~~Less than 8 hours~~

Driving Experience in General Area and Conditions

~~First journey in remote areas~~

~~0 to 6 months in remote areas~~

6 to 12 months

~~12 to 18 months~~

~~18+ months~~

Add comments to your review...

DENY

APPROVE

The Reviewer must approve or deny the Activity before the Activity is to commence. Failing to review the Activity, will result in the Activity being cancelled at the time it is to start. The User will receive notification via SMS and email that the Activity has been cancelled due to the Activity not being reviewed.

JESI

To: Jeremy Martin

JESI: Approved Risk Assessment Outcome

Today at 2:32 PM

J



The risk assessment for your journey from
Brisbane City at 14:40, 20 Dec 2017, to
Brisbane City at 17:40, 20 Dec 2017 has been
approved and you may now continue the risk
assessment.

To view further details click the button below:

[VIEW THE JOURNEY →](#)

JESI Management Solutions Pty Ltd, PO Box 8212, Garbutt QLD 4814, AUSTRALIA

[Click here to watch video.](#)

7.5.2. Business Rules Advanced Trip Risk Assessment

The Advanced TRA is assigned at the Team level, meaning that if the User has the TRA assigned to their Team it is compulsory to complete the TRA before the Activity commences. Failing to complete the TRA will result in the Activity being cancelled at the departure time. The User and the Users' Escalation Contact/Reviewer will receive an SMS and email notification advising that the Activity has been cancelled.

Once the Activity has been entered into JESI the TRA then requires completion. If the TRA is not automatically approved, the Reviewer will receive an SMS and email notification with a link to the answers submitted. The Reviewer will then approve or deny the Activity which will send the User a notification of the outcome via SMS and email.

If the User has forgotten to complete the TRA a 24hour and 1hour reminder will be automatically sent by SMS and email before the Activity commences.

IMPORTANT

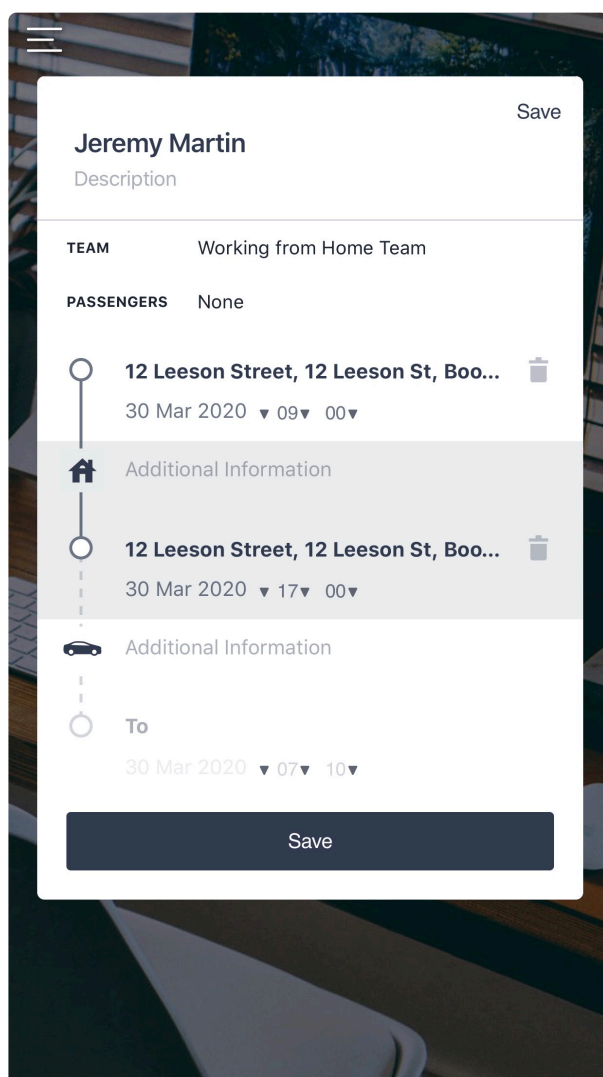
If the Reviewer fails to review the TRA before the Activity commences the Activity will cancel at the departure time. The User will receive an SMS and email notification advising of this.

7.6. Completing the Work From Home Risk Assessment

IMPORTANT Make sure the Working From Home Risk Assessment has been enabled. (confirm with your JESI Customer Success Team at customersuccess@jesims.com.au)

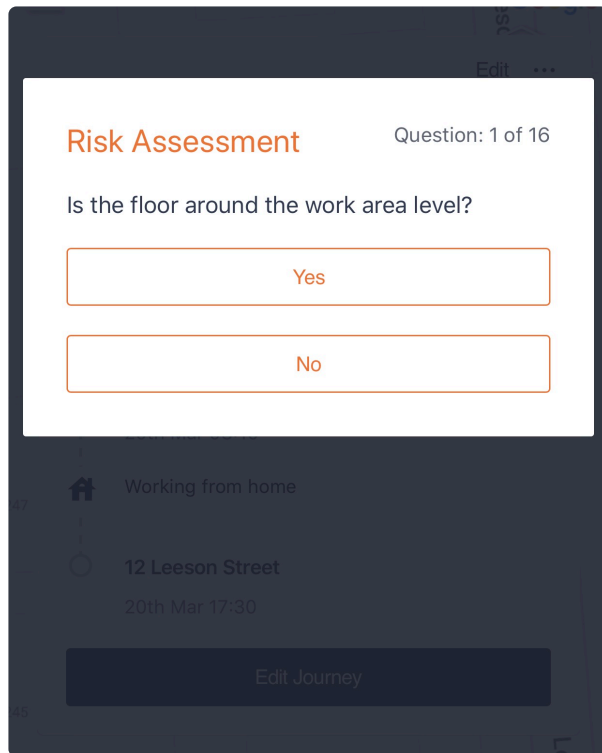
How to complete the Work From Home Risk Assessment.

1. When only the Working From Home Activity type (House Icon) is selected, the Working From Home Risk Assessment will open once the Activity Card is saved.



The screenshot shows a mobile application interface for a risk assessment. At the top, there is a 'Save' button. Below it, the name 'Jeremy Martin' is displayed, followed by a 'Description' field. The form is divided into sections: 'TEAM' with the value 'Working from Home Team', and 'PASSENGERS' with the value 'None'. There are two activity entries, each starting with a house icon and the address '12 Leeson Street, 12 Leeson St, Boo...'. The first entry has a date of '30 Mar 2020' and a time of '09:00'. The second entry has a date of '30 Mar 2020' and a time of '17:00'. Below these entries is a section titled 'Additional Information' with a car icon. At the bottom, there is a 'To' field with a date of '30 Mar 2020' and a time of '07:10'. A large 'Save' button is at the very bottom.

2. Complete Working From Home Risk Assessment.



The screenshot displays a mobile application interface for a risk assessment. At the top, the title "Risk Assessment" is shown in orange, followed by "Question: 1 of 16". The question text is "Is the floor around the work area level?". Below the question are two rectangular buttons with orange borders: "Yes" and "No". The background is dark grey and shows a blurred view of a mobile app with a home icon, the text "Working from home", "12 Leeson Street", "20th Mar 17:30", and an "Edit Journey" button.

Risk Assessment Question: 1 of 16

Is the floor around the work area level?

Yes

No

Working from home

12 Leeson Street

20th Mar 17:30

Edit Journey

Click [here](#) to watch tutorial video.

7.6.1. Work from Home Risk Assessment Questions

To view the Work From Home Risk Assessment questions please click [here](#).

7.6.2. Working From Home Risk Assessment FAQ's

Working From Home Risk Assessment FAQ's

Q. How is a Working From Home Risk Assessment generated?

A. The Assessment needs to be enabled at the Team level and the User will need to complete the The Working From Home Activity using the correct Activity icon (Working From Home).

Q. What if my Team already has an existing Risk Assessment attached?

A. The existing Risk Assessment will automatically be generated as per the normal behaviour. **Do not select the Work From Home Activity.

Q. What if I am working from home and also travelling? Which Risk Assessment opens?

A. If you have selected multiple Activity Types (Car and Working from Home) AND your team has an existing driving Risk Assessment attached, only the driving Risk Assessment will be required to be completed.

Q. What if my Team does not have any Risk Assessment activated?

A. No Risk Assessment will need to be completed. If you would like to discuss what Risk Assessments are available, please contact JESI Customer Success on customersuccess@jesims.com.au

8. Viewing Users Data

A Users [permission level](#) will determine what data they can view in JESI. Not all Users can access all information.

Administrators have complete access to the whole JESI Company Account.

Monitors and Managers can only see the information relevant to the Teams they are associated with and Users can only see their own data.

8.1. How to Search for User Profiles & Profile Status



Click on 'Users' found in the left hand side menu.

Start typing the name of the User in the Search Bar.

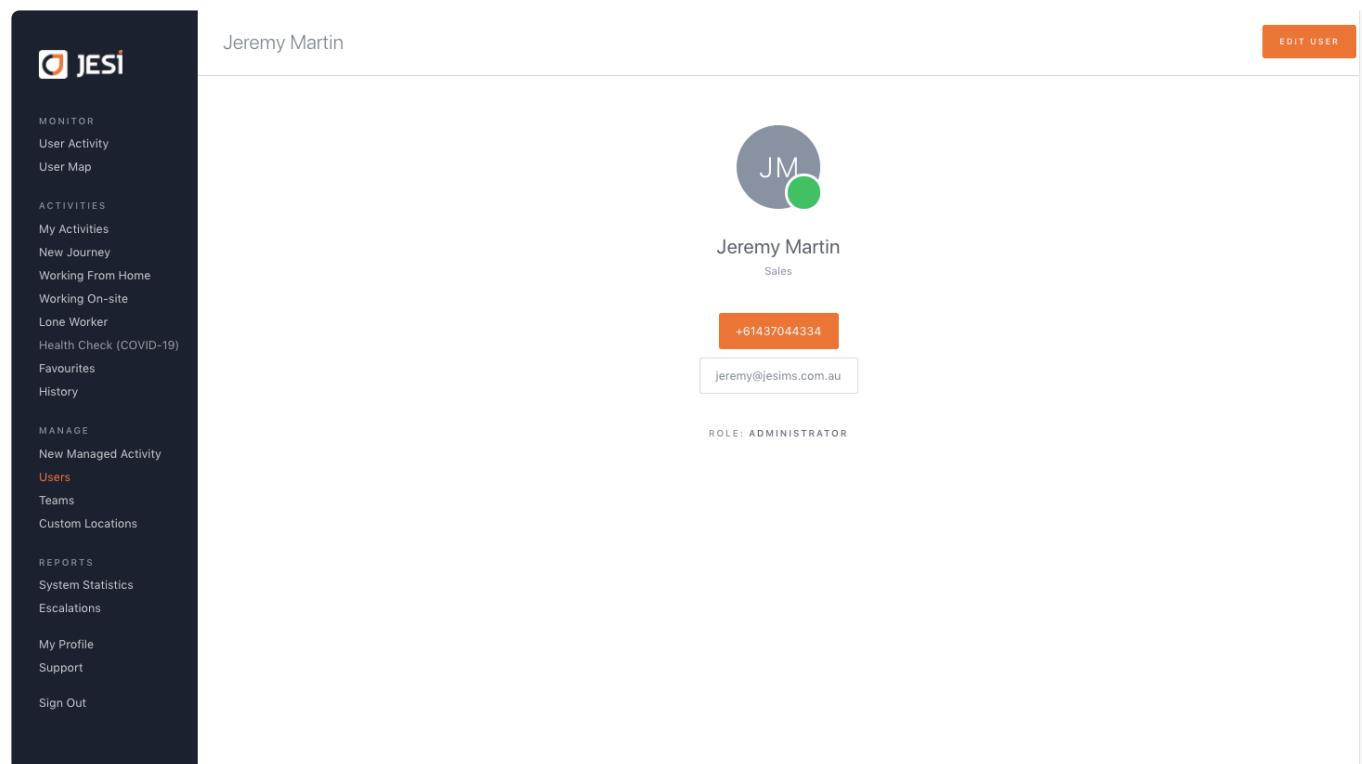
The screenshot displays the JESI Management Solutions interface. On the left is a dark sidebar with a menu containing sections: MONITOR, ACTIVITIES (with sub-items: My Activities, New Journey, Working From Home, Working On-Site, Lone Worker, Wellbeing Check, Favourites, History), MANAGE (with sub-items: New Managed Activity, Users, Teams, Custom Locations), and REPORTS (with sub-items: My Profile, Training Centre, What's New, Sign Out). At the bottom of the sidebar, the user 'Jeremy Martin' is logged in as 'JESI'.

The main content area has a top header with a search bar containing 'kathy', a dropdown menu showing '3 User Statuses Selected', and a link 'Add Team Filter'. Below this are buttons for 'ACTIVATE/SEND SMS', 'DEACTIVATE', 'DOWNLOAD AS CSV', and 'NEW USER'.

A table lists the search results, showing '1 User'.

	NAME	PASSWORD	PHONE NUMBER	USER ROLE	ESCALATION CONTACT	ACTIVITY IN PROGRESS
<input type="checkbox"/>	 Kathy Wilson +61427400602	Confirmed	Confirmed	Administrator		

When the User has been located, click on their name and their User profile will open.



The screenshot shows the JESI user interface. On the left is a dark sidebar with the JESI logo and a menu with categories: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The main content area displays the profile for 'Jeremy Martin' with a circular avatar containing 'JM' and a green status indicator. Below the name is the role 'Sales'. Contact information includes a mobile number '+61437044334' and an email 'jeremy@jesims.com.au'. At the bottom, it states 'ROLE: ADMINISTRATOR'. An 'EDIT USER' button is in the top right corner.

Alternatively scroll down the page.

If a User can not be located by their first or last name, an email or mobile can be used in the search bar. Ensure you have enabled Team filter when searching.

The profile icon of the User will identify, by colour code, whether the User profile is Active, Registered or Deactivated.

Green status indicates profile is ACTIVE. To have a profile in an Active state requires the SMS to be sent and the User reply with their surname.



Jeremy Martin

Sales

Orange status indicates profile is REGISTERED. To have a profile in a Registered state requires the SMS to be sent to the User however they are yet to reply with their surname.



Jeremy Martin

Grey status indicates profile is DEACTIVATED. A profile can showing as Deactivated for two reasons:

1. The profile is newly created and the User is yet to be sent the activation SMS or
2. The profile was Registered or Active and has been Deactivated manually by a User with the correct permission level.



Jeremy Martin

Black status indicates profile is PRE-REGISTERED. To have a profile in a Pre-Registered state requires the profile to have been added to JESI however no activation SMS nor email has been sent.



Jeremy Martin

Sales

8.2. User Activity Dashboard and Definitions

The Users assigned [permission level](#) dictates if they have access to the 'User Activity Report'. Click on 'User Activity' found in the left hand side menu.

The 'User Activity Report' shows the status of Users.

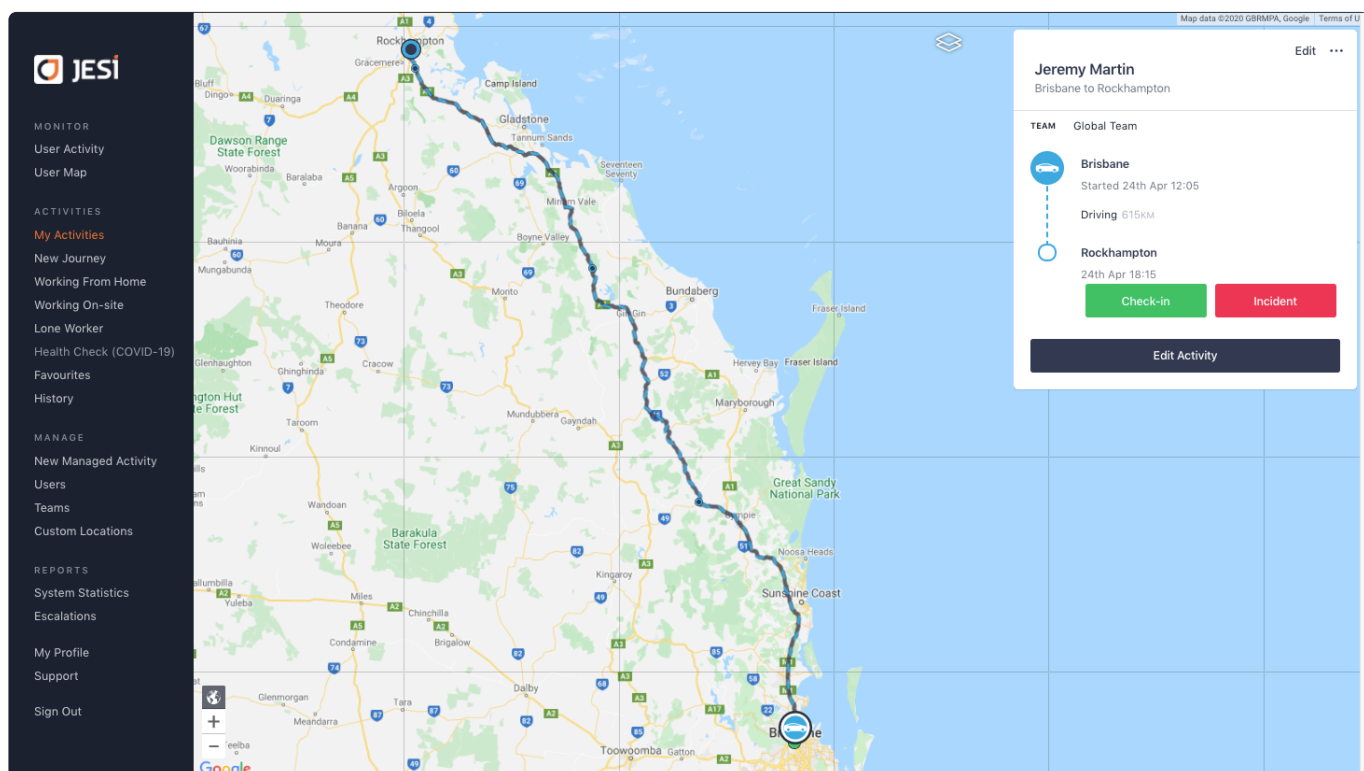
Note:

- Future Activities can be viewed by clicking on 'Advanced Dates' found in the top right hand corner.

The status of Users' Activities are indicated in colour within the 'User Activity Report'. This gives a quick snapshot of the organisations JESI Users.

- Grey or 'PENDING' – Activity is about to commence.
- Blue or 'ACTIVE' – Activity has commenced.
- Green or 'COMPLETED' – Activity has been completed and the User has safely Checked-In.
- Yellow or 'DUE' – the User is due to Check-In, however has not reached the designated time for Escalation.
- Orange or 'ESCALATED' – a User has not Checked-In and an Escalation Alert has been sent.
- Red or 'INCIDENT' – a User has been involved in an Incident whilst travelling.

If a specific Users' Activity needs to be viewed, clicking on their name will open up all the details of the Activity.



[Click here to watch video How to Check-In a User and User Activity Dashboards.](#)

8.2.1. User Activity Dashboard Icons

To quickly identify the activity type, the User Activity Dashboard has improved the visual display using icons and now includes a Working From Home Activity.

The icon is displayed between Start Time and Next Check-in.

Actions

6 Statuses Selected

Last 30 Days

[Add Team Filter](#)

MONITOR

User Activity

User Map

ACTIVITIES

MANAGE

New Managed Activity

Users

Teams

Custom Locations

REPORTS

My Profile

Training Centre

What's New

Sign Out

Jeremy Martin

























JESI

ADVANCED DATES

DOWNLOAD AS CSV

STATUS	USER	START LOCATION	START TIME		NEXT CHECK-IN	CHECK-IN TIME	END LOCATION
ACTIVE	Luke Donné	Il Mondo Boutique Hotel, 25-35 Rotherham St, ...	14 Sep 20		The Sebel Brisbane, Cnr Albert and, Charlotte ...	25 Sep 20	The Sebel Brisbane, Cnr Albert and, Charlotte ...
COMPLETE	Joanne Walter	Brisbane QLD, Australia	04 Sep 20		Brisbane QLD, Australia	07 Sep 20	Brisbane QLD, Australia
COMPLETE	Jeremy Martin	Townsville QLD, Australia	03 Sep 20		Townsville QLD, Australia	03 Sep 20	Townsville QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	27 Aug 20		Brisbane QLD, Australia	31 Aug 20	Brisbane QLD, Australia
COMPLETE	Joe Hoolahan	122 Hornbrook Esplanade, Clontarf QLD 4019, ...	28 Aug 20		IKEA, 3539-3565 Pacific Hwy, Slacks Creek QL...	28 Aug 20	IKEA, 3539-3565 Pacific Hwy, Slacks Creek QL...
COMPLETE	Luke Donné	Co Habitat - Co-Working Space, Level 1 33-35 ...	25 Aug 20		Cairns QLD, Australia	28 Aug 20	Cairns QLD, Australia
COMPLETE	André de Jager	Co Habitat - Co-Working Space, Level 1 33-35 ...	24 Aug 20		Townsville Brewery, 252 Flinders St, Townsville ...	28 Aug 20	Townsville Brewery, 252 Flinders St, Townsville ...
COMPLETE	Joe Hoolahan	122 Hornbrook Esplanade, Clontarf QLD 4019, ...	26 Aug 20		IKEA, 3539-3565 Pacific Hwy, Slacks Creek QL...	27 Aug 20	IKEA, 3539-3565 Pacific Hwy, Slacks Creek QL...
COMPLETE	Joanne Walter	Brisbane QLD, Australia	25 Aug 20		Brisbane QLD, Australia	25 Aug 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	24 Aug 20		Baralaba Substation	24 Aug 20	Baralaba Substation

Activity Type.

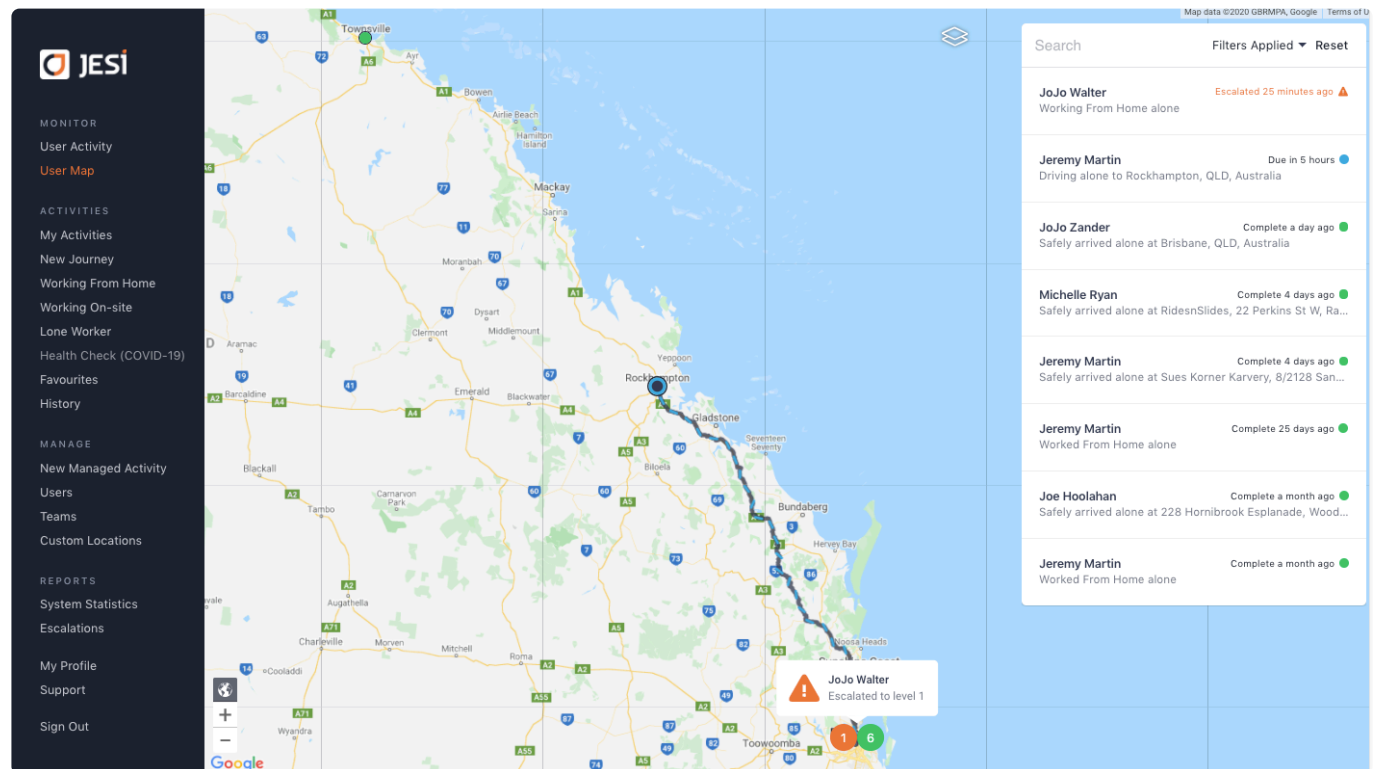
	Activity Type	My Default 
	Accommodation	
	Bus	
	Car Fleet	
	Car Hire	Default 
	Car Personal	
	Helicopter	
	Lone Worker	
	Motorbike	
	Other	
	Plane Commercial	
	Plane Private	
	Stationary	
	Taxi	
	Train	
	Truck Combination	
	Truck Heavy Rigid	
	Uber	
	Walking	
	Watercraft	
	Working From Home	
	Working On-site	

8.3. User Map

The Users assigned [permission level](#) dictates who has access to the 'User Map'. Click on the 'User Map' found in the left hand side menu.

****Best viewed on Desktop / Laptop through Google Chrome browser.**

The 'User Map' views the status of a Users' Activity and geographical location.



If there are multiple Activities in one location, they are clustered together and are identified by the number of Activities in that location.

The screenshot shows the JESI User Map interface. On the left is a sidebar with navigation options: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The main area displays a map of Brisbane with a blue route line. A pop-up card for 'JoJo Walter' shows 'Escalated to level 1'. On the right, a '7 journeys shown' list includes:

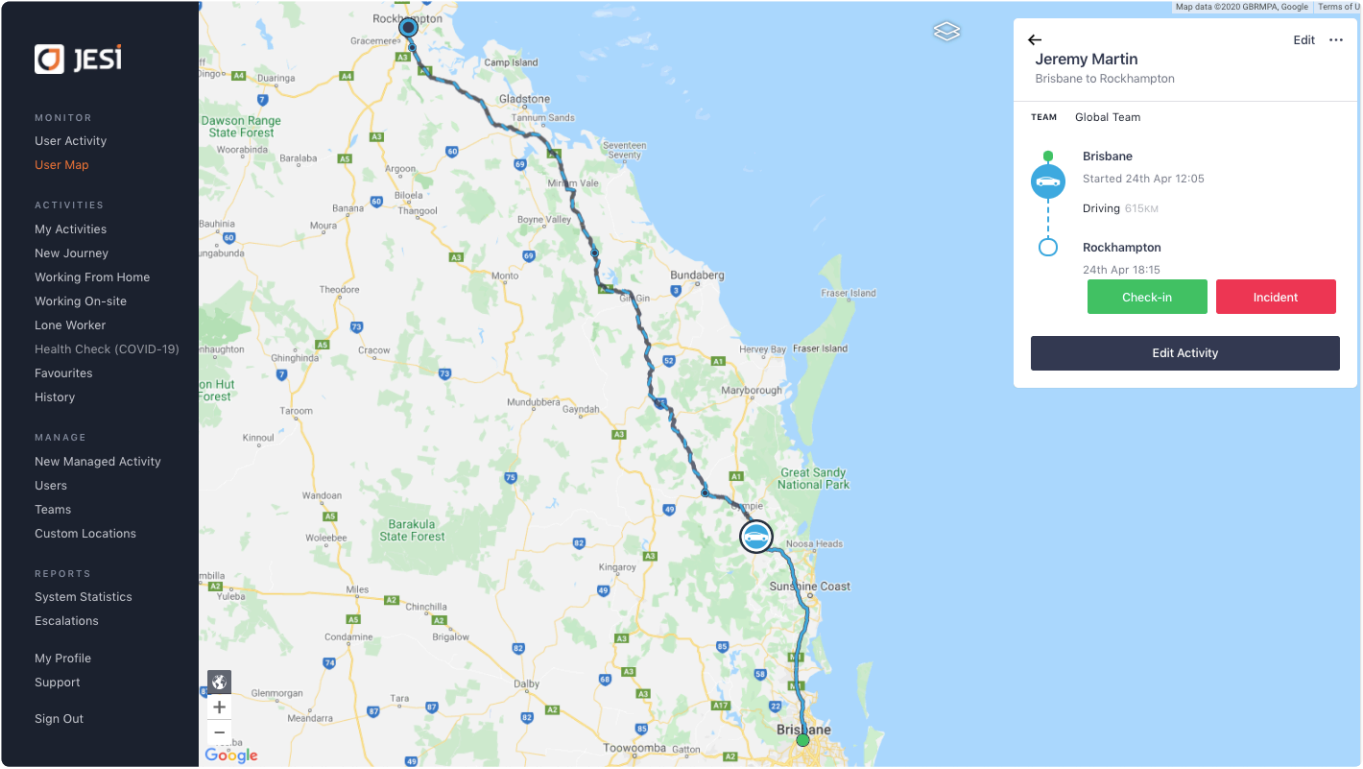
- JoJo Walter**: Working From Home alone, Escalated 26 minutes ago (red triangle icon).
- Jeremy Martin**: Driving alone to Rockhampton, QLD, Australia, Due in 5 hours (blue circle icon).
- JoJo Zander**: Safely arrived alone at Brisbane, QLD, Australia, Complete a day ago (green circle icon).
- Jeremy Martin**: Safely arrived alone at Sues Korner Karvery, 8/2128 San..., Complete 4 days ago (green circle icon).
- Jeremy Martin**: Worked From Home alone, Complete 25 days ago (green circle icon).
- Joe Hoolahan**: Safely arrived alone at 228 Hornbrook Esplanade, Wood..., Complete a month ago (green circle icon).
- Jeremy Martin**: Worked From Home alone, Complete a month ago (green circle icon).

To view the Activities either click on the number or hover-over. The Activities will be displayed in the right hand side Activity details card.

This screenshot provides a closer view of the map area. The 'JoJo Walter' pop-up card remains visible. The journey list on the right is updated to show 4 journeys:

- JoJo Walter**: Working From Home alone, Escalated 28 minutes ago (red triangle icon).
- Jeremy Martin**: Driving alone to Rockhampton, QLD, Australia, Due in 5 hours (blue circle icon).
- JoJo Zander**: Safely arrived alone at Brisbane, QLD, Australia, Complete a day ago (green circle icon).
- Kathy Wilson**: Safely arrived alone at Brisbane, QLD, Australia, Complete 2 months ago (green circle icon).

To view the Activity details click on the Activity from the Activity card, this will open the Activity. To navigate back to the Activity card click on the back arrow above the Activity.



8.4. User Map View Filters

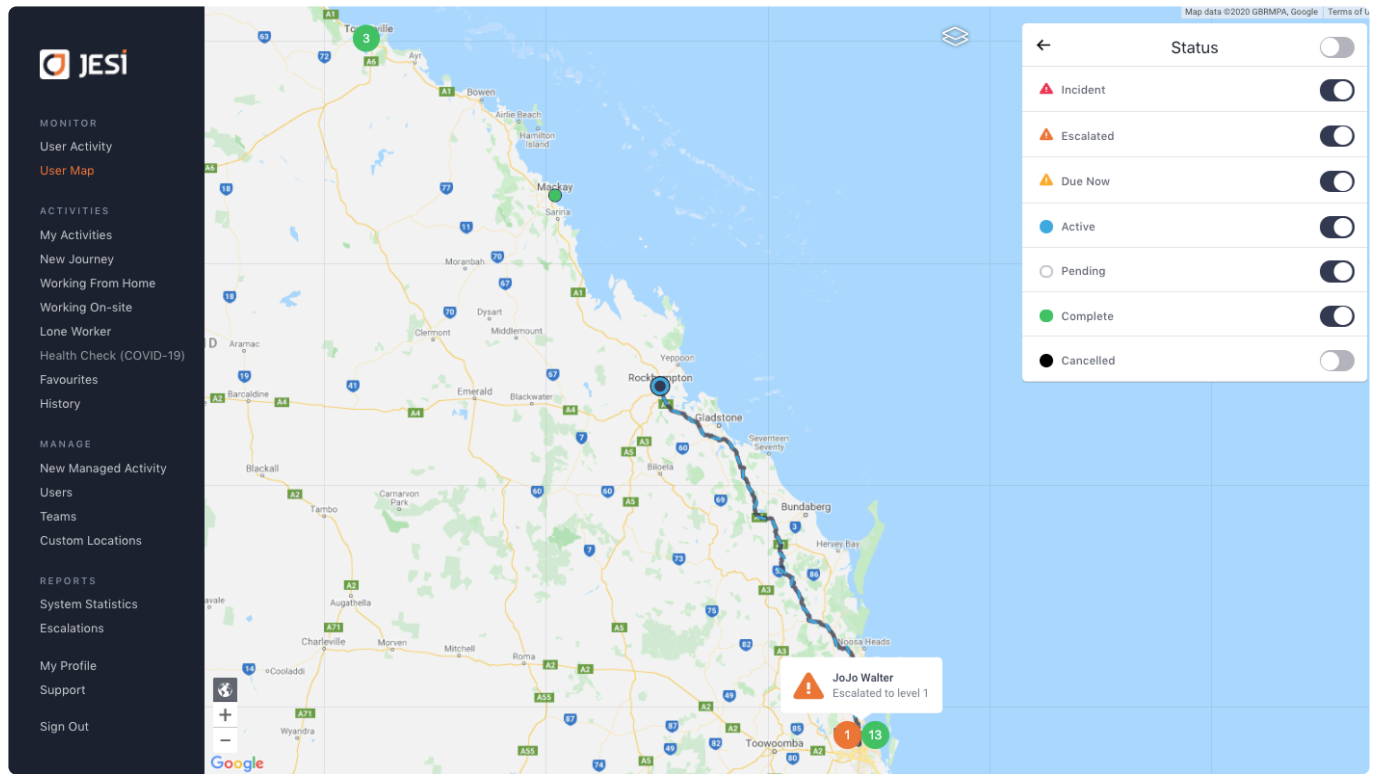
Filters can be applied to the 'User Map' to show different map styles, themes (dark or light view) and past and future routes (It is recommended when viewing historical data of more than 30 days to turn Routes OFF for speed to load).

To modify the map theme, click on the area next to the Activity card.

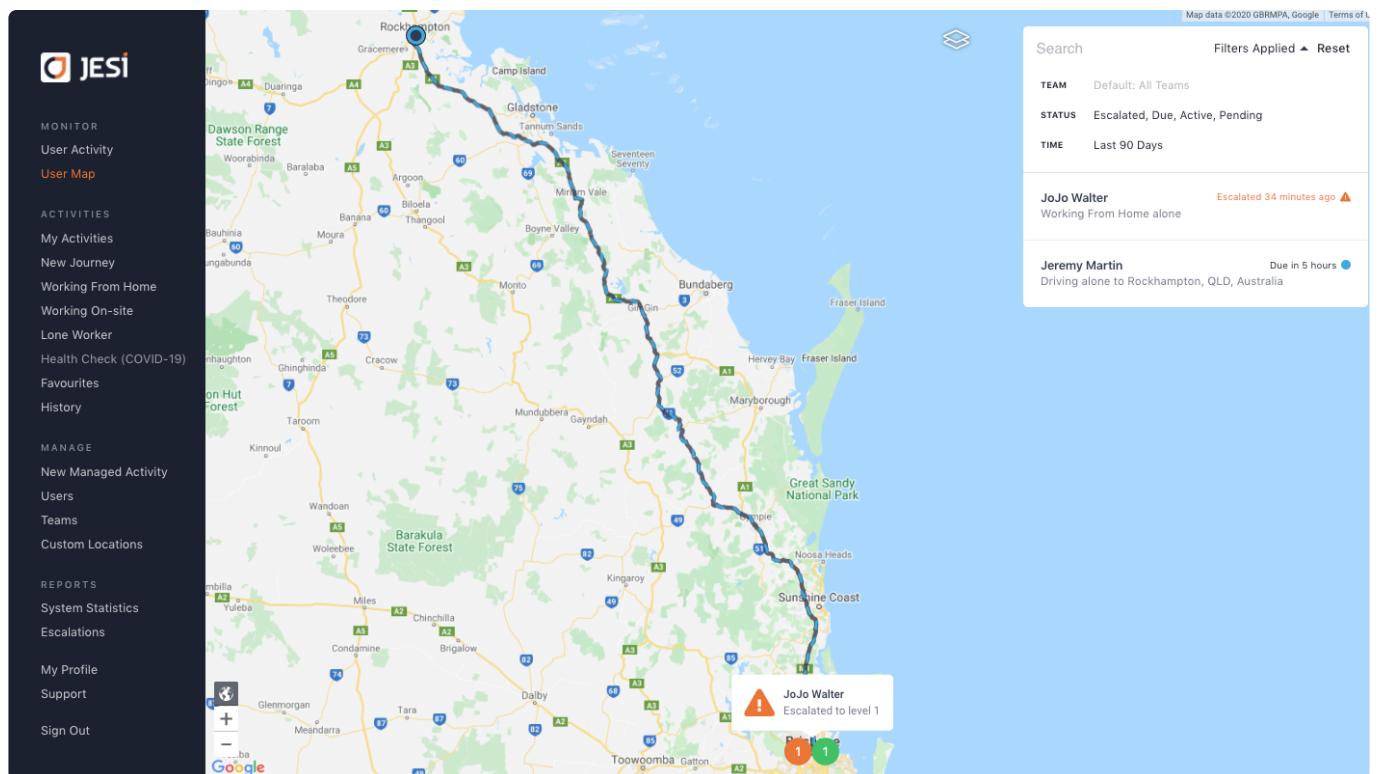
The screenshot displays the JESI User Map View interface. On the left is a dark sidebar with the JESI logo and navigation links under three categories: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), and MANAGE (New Managed Activity, Users, Teams, Custom Locations). Below these are REPORTS (System Statistics, Escalations), My Profile, Support, and Sign Out.

The main area features a map of Queensland, Australia, with a blue route highlighted. A pop-up menu for the map shows options for MAP TYPE (Default), TIMELINES (Present), DARK THEME (toggle), and ROUTES (toggle). A search bar at the top right is labeled 'Search' and 'Filters Applied Reset'. Below the search bar is a list of activity cards for various users, including JoJo Walter, Jeremy Martin, JoJo Zander, Michelle Ryan, and Joe Hoolahan. Each card shows the user's name, activity type, and status (e.g., 'Escalated 32 minutes ago', 'Due in 5 hours', 'Complete a day ago').

Filters can be applied to view Activity statuses and timeframes. To apply the filters simply click the 'back' arrow.



The Activity will be displayed on the Activity card.



The status of a User is indicated in colour within the 'User Activity Map'. This gives a quick snapshot of the organisations workforce.

- Grey or 'PENDING' – Activity is about to commence.
- Blue or 'ACTIVE' – Activity has commenced.
- Green or 'COMPLETED' – Activity has been completed and the User has safely Checked-In.
- Yellow or 'CHECK-IN DUE' – the User is due to Check-In, however has not reached the

designated time for Escalation.

- Orange or 'ESCALATED' – a User has not Checked-In and an Escalation Alert has been sent.
- Red or 'INCIDENT OCCURRED' – a User has been involved in an Incident whilst on an Activity.

8.5. How to view Team Escalations

Click on 'Users' found in the left hand side menu and search User.

On the right hand side a green tick identifies the User as an Escalation Contact. Click on the green tick and this will list the Teams where the User is an Escalation Contact. Click on the dropdown list and the Team is hyperlinked.

The screenshot shows the JESI Users management interface. On the left is a dark sidebar with navigation options: MONITOR, ACTIVITIES, MANAGE, and REPORTS. The main area has a search bar with 'kat' entered, and filters for '2 User Statuses Selected' and '115 Teams Selected'. Below the filters are buttons for 'ACTIVATE/SEND SMS', 'DEACTIVATE', 'DOWNLOAD AS CSV', and 'NEW USER'. A table lists users, with 'Kathy Smith' highlighted. A green tick in the 'ESCALATION CONTACT' column is clicked, opening a dropdown menu with the text 'Advanced TRA Testing - October' and a 'REPLACE' button.

NAME	PASSWORD	PHONE NUMBER	USER ROLE	ESCALATION CONTACT	ACTIVITY IN PROGRESS
Kathy Smith	Set	+6100000012	Administrator	✓	

Alternatively Team Escalation Contacts can be viewed from the Teams page.

Select the Team from the Teams page, click on the Team, this will dropdown the Team details.

The screenshot shows the JESI Teams management interface. The left sidebar is the same as the previous screenshot. The main area has a search bar, a 'Choose a User' dropdown, and a 'Statuses' dropdown. A table lists teams with columns for 'TEAM', 'TRA', '5 MINUTES', '10 MINUTES', '15 MINUTES', '20 MINUTES', and '30 MINUTES'. The 'Default Advanced TRA' team is selected, opening a dropdown menu showing 'RISK ASSESSMENT Default Advanced TRA' and an 'EDIT TEAM' button. Below this, a table shows the team's members and their escalation status for different time intervals.

TEAM	TRA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES
AA Environmental Consultants		●	●	●		
Alexander	✓					
Ballarat North Drilling and Excavation				●	●	
Default Advanced TRA	✓	●	●		●	

MEMBERS		5 MINUTES	10 MINUTES	20 MINUTES
Jeremy Martin	Kathy Wilson	Joe Hoolahan	Joe Hoolahan	Alex Scott
				Joe Hoolahan

8.6. User Activity Search Options

Select 'User Activity' found in the left hand side menu.

At the top of the page in the Search area, a User can be searched for by first/last name or location. You can also apply filters to the search criteria if you are looking for a specific date range or Team.

- MONITOR
 - User Activity
 - User Map
- ACTIVITIES
- MANAGE
- REPORTS
- My Profile
- Training Centre
- What's New
- Sign Out
- Jeremy Martin
- JESI

Actions

6 Statuses Selected

Last 30 Days

Add Team Filter

ADVANCED DATES

DOWNLOAD AS CSV

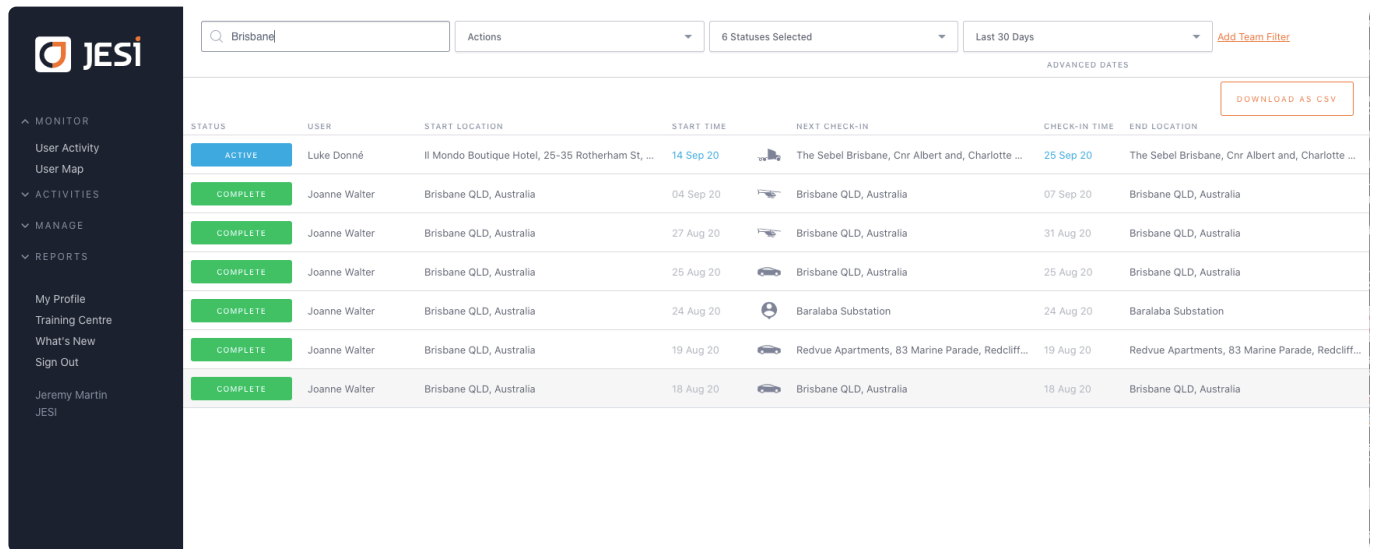
STATUS	USER	START LOCATION	START TIME	NEXT CHECK-IN	CHECK-IN TIME	END LOCATION
ACTIVE	Luke Donné	Il Mondo Boutique Hotel, 25-35 Rotherham St, ...	14 Sep 20	The Sebel Brisbane, Cnr Albert and, Charlotte ...	25 Sep 20	The Sebel Brisbane, Cnr Albert and, Charlotte ...
COMPLETE	Joanne Walter	Brisbane QLD, Australia	04 Sep 20	Brisbane QLD, Australia	07 Sep 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	27 Aug 20	Brisbane QLD, Australia	31 Aug 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	25 Aug 20	Brisbane QLD, Australia	25 Aug 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	24 Aug 20	Baralaba Substation	24 Aug 20	Baralaba Substation
COMPLETE	Joanne Walter	Brisbane QLD, Australia	19 Aug 20	Redvue Apartments, 83 Marine Parade, Redcliff...	19 Aug 20	Redvue Apartments, 83 Marine Parade, Redcliff...
COMPLETE	Joanne Walter	Brisbane QLD, Australia	18 Aug 20	Brisbane QLD, Australia	18 Aug 20	Brisbane QLD, Australia

8.7. Viewing Activity Details

Select 'User Activity' found in the left hand side menu.

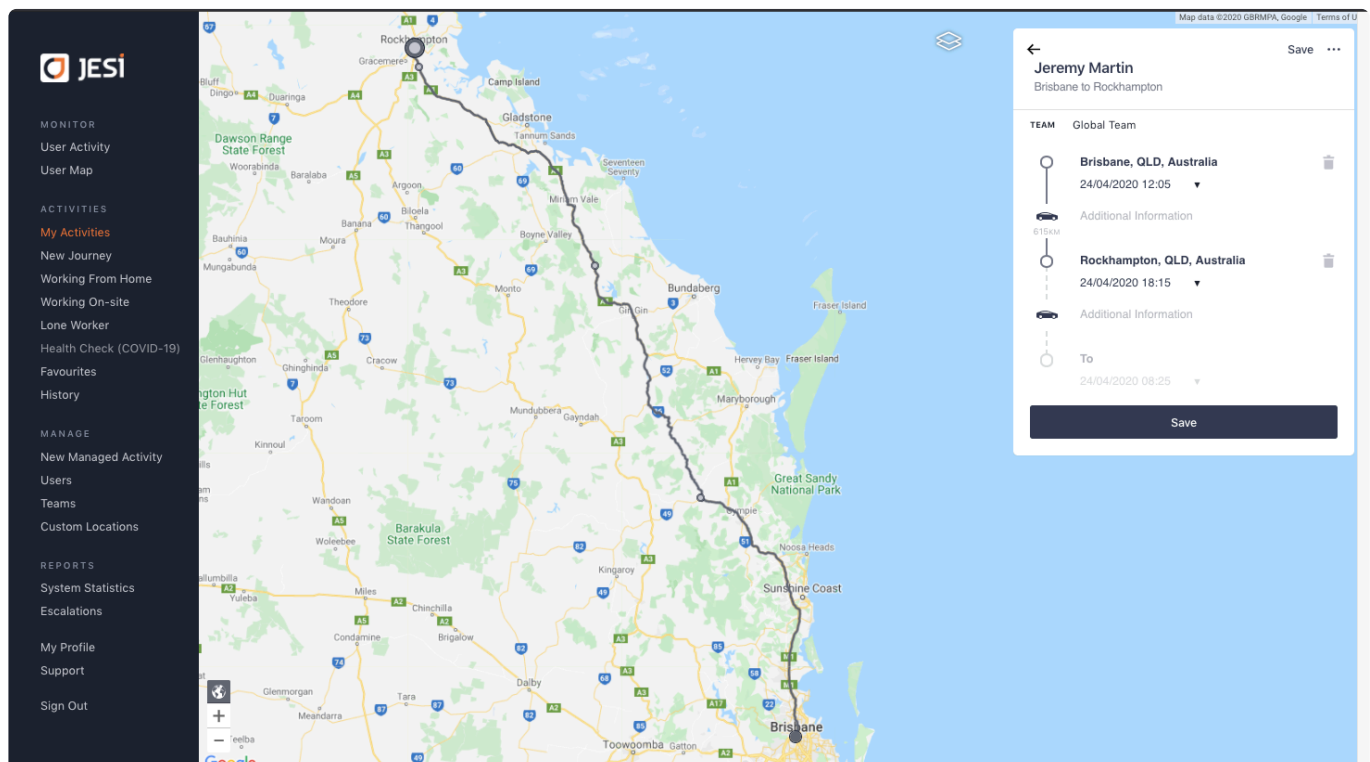
Find the User you are looking for.

Click on the Users' Activity and you can see their Activity details.



The screenshot shows the JESI User Activity page. On the left is a dark sidebar with the JESI logo and a menu with sections: MONITOR (User Activity, User Map), ACTIVITIES (My Activities), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The main content area has a search bar with 'Brisbane', filters for 'Actions', '6 Statuses Selected', and 'Last 30 Days', and a 'Download AS CSV' button. Below is a table of activity details.

STATUS	USER	START LOCATION	START TIME	NEXT CHECK-IN	CHECK-IN TIME	END LOCATION
ACTIVE	Luke Donné	Il Mondo Boutique Hotel, 25-35 Rotherham St, ...	14 Sep 20	The Sebel Brisbane, Cnr Albert and, Charlotte ...	25 Sep 20	The Sebel Brisbane, Cnr Albert and, Charlotte ...
COMPLETE	Joanne Walter	Brisbane QLD, Australia	04 Sep 20	Brisbane QLD, Australia	07 Sep 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	27 Aug 20	Brisbane QLD, Australia	31 Aug 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	25 Aug 20	Brisbane QLD, Australia	25 Aug 20	Brisbane QLD, Australia
COMPLETE	Joanne Walter	Brisbane QLD, Australia	24 Aug 20	Baralaba Substation	24 Aug 20	Baralaba Substation
COMPLETE	Joanne Walter	Brisbane QLD, Australia	19 Aug 20	Redvue Apartments, 83 Marine Parade, Redcliff...	19 Aug 20	Redvue Apartments, 83 Marine Parade, Redcliff...
COMPLETE	Joanne Walter	Brisbane QLD, Australia	18 Aug 20	Brisbane QLD, Australia	18 Aug 20	Brisbane QLD, Australia



The screenshot shows the JESI map view. On the left is the same sidebar as the previous screenshot. The main content area displays a map of Queensland, Australia, with a route highlighted from Brisbane to Rockhampton. On the right, a detailed activity log for 'Jeremy Martin' is shown, including the team 'Global Team', the route 'Brisbane, QLD, Australia' to 'Rockhampton, QLD, Australia', and the time '24/04/2020 12:05'. The log also includes a 'To' field with the time '24/04/2020 08:25' and a 'Save' button.

To view the communication that has occurred between JESI and the User, click on the relevant Check-In. This will show the Activity audit log. The audit logs show the time and dates and to whom communication has been sent for this Activity.

The screenshot displays the JESI Management Solutions interface. On the left is a dark sidebar menu with the following sections:

- MONITOR**
 - User Activity
 - User Map
- ACTIVITIES**
 - My Activities
 - New Journey
 - Working From Home
 - Working On-site
 - Lone Worker
 - Health Check (COVID-19)
 - Favourites
 - History
- MANAGE**
 - New Managed Activity
 - Users
 - Teams
 - Custom Locations
- REPORTS**
 - System Statistics
 - Escalations
- My Profile**
 - Support
 - Sign Out

The main area shows a Google Map of Brisbane, Australia, with a blue line indicating a journey path. A green dot marks the starting point. An overlay window on the right contains the following information:

Brisbane
QLD, Australia
Started 2 hours ago 24th Apr 12:05
Add a Note
Submit

AUDIT LOG

24th Apr 11:54	Pre-journey 15 Minute Reminder SMS sent to Jeremy Martin on +61437044334
24th Apr 11:54	Pre-journey 15 Minute Reminder email sent to Jeremy Martin on jeremy@jesims.com.au
24th Apr 11:54	Journey Created by Jeremy Martin

9. Accessing Reports

All the data collected is collated and accessed to provide a high level overview of the Activity undertaken over a period of time. The data can be used to monitor the Company performance and can drive measurable outcomes.

9.1. System Statistics Search Options

The 'System Statistics Report' provides a snapshot of the total Activities, Check-Ins, Escalations and types of Activity for an individual User or Team.



Search for User or Team data and click through on the Activities and Escalation areas to view this data. At the top of the page select which filtered data is to be displayed on the graph. Hover over graph lines to view overview of daily Activity. View Activities, Check-Ins, Escalations or Incidents.

[Click here to watch System Statistics and Escalations.](#)


9.2. Accessing Escalation Data

Click on 'Escalations' found in the left hand side menu.

On this page you can search by User, Teams and Date range.

This shows you who has Escalated and at what point in their Activity this occurred.

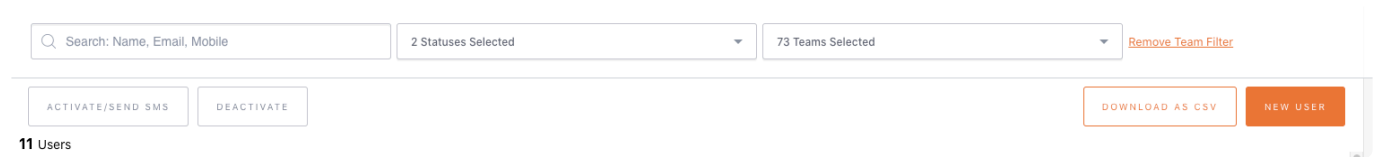
Click on a User and this will take you through to their Activity.

<div>  <div> <input type="text" value="Choose a User"/> <div>Teams ▾</div> <div>Levels ▾</div> <div>Date ▾</div> </div> </div> <div>ADVANCED DATES</div>						
LEV...	USER	START LOCATION	ESCALATED CHECK-IN	DATE OF ESC...	END LOCATION	
1	JoJo Walter	Brisbane	Brisbane	24 Apr 20	Brisbane	
1	JoJo Walter	Brisbane	The Belvedere Hotel	23 Apr 20	The Belvedere Hotel	
1	JoJo Walter	West India	Westfield Shopping Centre	22 Apr 20	Westfield Shopping Centre	
2	JoJo Zander	Brisbane	Brisbane	20 Apr 20	Brisbane	
1	Michelle Ryan	South Townsville Take Away & Snack Bar	RidesnSlides	20 Apr 20	RidesnSlides	

9.3. Exporting User Data

Simply click on 'Users' found in the left hand side menu, and you will find the 'Download As CSV' button in the top right hand corner.

You can filter this information by using the dropdown menus at the top of the page.



The screenshot shows the top section of the JESI User Management interface. It includes a search bar with the placeholder text 'Search: Name, Email, Mobile'. To the right of the search bar are two dropdown menus: '2 Statuses Selected' and '73 Teams Selected'. A link labeled 'Remove Team Filter' is positioned to the right of the second dropdown. Below these elements are three buttons: 'ACTIVATE/SEND SMS', 'DEACTIVATE', and 'DOWNLOAD AS CSV'. To the right of the 'DOWNLOAD AS CSV' button is an orange button labeled 'NEW USER'. At the bottom left of the interface, it says '11 Users'.

This action will export the User data located within the User Tab.

10. Managing User Profiles

Each User in JESI is required to have a unique mobile and email address.

There are 4 permission levels within JESI depending on access required by the User ([see Permission Levels section](#)).

The permission restrictions are in place to ensure data integrity is kept to the highest standards.

10.1. Permission Levels

There are 4 Key Roles that have slightly different access permissions.

1. **User:** All JESI Users can create, edit, delete or cancel their Activity details. Users can also Check-In themselves.
2. **Monitor:** The main function of being a 'Monitor' is the ability to create an Activity for other Users, monitor their Activity status and respond to Escalations. Monitors do not have permission to perform functions for Teams that they are not attached to.
3. **Manager:** A Manager has the ability to add and manage Users that are associated with their Team/s. Managers have permission to create Users, add Users to their Team/s, create and manage Activities and view User Activity and System Statistic Reports, for the Teams that they are attached to. If Managers are not attached to a Team they will not be able to view or perform functions for these Teams.
4. **Administrator:** Administrators control the integrity of the JESI software and meet organisational policies. Administrators have access to all the same permission levels as a User, Monitor and Manager, however they have added authority to Manage Teams and also Customise Locations.

JESI Permissions Access Level Control



TEAMS	Team Member	Monitor	Manager	Admin	Company Admin
Create Teams	✗	✗	✗	✓	✓
Add/Edit Escalation Contacts	✗	✗	✓	✓	✓
Add/Edit Escalation Levels and Times	✗	✗	✓	✓	✓
Edit all	✗	✗	✗	✓	✓
Deactivate Team	✗	✗	✗	✓	✓
View Teams they are in	✓	✓	✓	✓	✓
View all Company Teams	✗	✗	✗	✓	✓

USERS	Team Member	Monitor	Manager	Admin	Company Admin
Create Users	✗	✗	✓	✓	✓
Edit Users	✗	✗	✓	✓	✓
Deactivate Users	✗	✗	✓	✓	✓
Determine Role Permission	✗	✗	✓	✓	✓
View Users in their Teams	✗	✓	✓	✓	✓
View all Company Users	✗	✗	✓	✓	✓
Send Activation SMS	✗	✗	✓	✓	✓

LOCATIONS	Team Member	Monitor	Manager	Admin	Company Admin
Create Custom Locations	✗	✗	✗	✓	✓
Edit Custom Locations	✗	✗	✗	✓	✓
Delete Custom Locations	✗	✗	✗	✓	✓
View all Custom Locations	✓	✓	✓	✓	✓

REPORTS	Team Member	Monitor	Manager	Admin	Company Admin
Team Member Activity	✗	✓	✓	✓	✓
System Stats	✗	✓	✓	✓	✓
Export CSV	✗	✓	✓	✓	✓

Last updated: October 2020

JESI Permissions Access Level Control



RISK ASSESSMENTS	Team Member	Monitor	Manager	Admin	Company Admin
Add a Risk Assessment to a Team	✗	✗	✓	✓	✓
Complete a Risk Assessment	✓	✓	✓	✓	✓
Complete a Risk Assessment on Anyone's Behalf	✗	✗	✗	✓	✓
Complete a Team Members Risk Assessment	✗	✓	✓	✓	✓
Review a Team Members Risk Assessment	✗	✓	✓	✓	✓
Review any Users Risk Assessment	✗	✗	✗	✓	✓

ACTIVITIES	Team Member	Monitor	Manager	Admin	Company Admin
Create Activity	✓	✓	✓	✓	✓
Create, Edit, Cancel, Check-in and Add Notes for Anyone in the Organisation	✗	✗	✗	✓	✓
Create, Edit, Cancel, Check-in and Add Notes for Anyone in the Teams they are in	✗	✓	✓	✓	✓
Edit Activities	✓	✓	✓	✓	✓
Cancel Activities	✓	✓	✓	✓	✓
Add Notes	✓	✓	✓	✓	✓
Create Favourites	✓	✓	✓	✓	✓
Tag Passengers	✓	✓	✓	✓	✓
View Activities of Users in their Teams	✗	✓	✓	✓	✓
View all Company Activities	✗	✗	✗	✓	✓
Be Escalation Contact for Teams they are in	✗	✓	✓	✓	✓
Be Escalation Contact for any Team	✗	✗	✗	✓	✓

Last updated: October 2020

10.2. Creating a New User

Create a New User Account

Click on 'User' found in the left hand side menu, then click on 'New User' in the top right hand corner.

The screenshot shows the top of the JESI user management interface. It includes a search bar with the text 'Search: Name, Email, Mobile', two dropdown menus showing '2 Statuses Selected' and '73 Teams Selected', and a 'Remove Team Filter' link. Below these are buttons for 'ACTIVATE/SEND SMS', 'DEACTIVATE', 'DOWNLOAD AS CSV', and 'NEW USER'. At the bottom left, it says '11 Users'.

Enter employee details, please ensure that you have set the User a Default Team when assigning the User a Team/s.

The screenshot shows the 'New User' form. On the left is a dark sidebar with the JESI logo and a menu with categories: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The main form area has a 'SAVE' button in the top right. It contains sections for: PROFILE PHOTO (with an 'UPLOAD PHOTO' button), NAME (with 'First Name' and 'Last Name' fields), POSITION (with a 'Position' field), CONTACT DETAILS (with 'Email Address' and 'Add Mobile Number' fields, and a note 'Use international mobile number format (+614...)'), TEAMS (with an 'Add Team' field), ROLE (with a dropdown menu showing 'Traveller'), and ACTIVATION (with a checkbox for 'Send activation SMS now').

Select the User Role that is relevant to the Users access permission level.

Roles:

- 'Administrator' – Has all access privileges to JESI.
- 'Manager' – Is a Manager within your organisation who has all privileges except creating Teams.
- 'Monitor' – Is a trusted staff member who is not a Manager, yet has permission to create an Activity on someone else's behalf
- 'Team Member' – An employee who uses JESI to log an Activity (restricted access)

An example of roles is shown below

ROLE

Select a Role ▼

- ✓ Select a Role
- Administrator
- Manager
- Monitor
- Traveller

From this page you can send the activation SMS if you would like to have the User activate their profile.

Press SAVE.

[Click here to watch video](#)

10.3. User Profile Status

The profile icon of the User will identify, by colour code, whether the User profile is Active, Registered, Deactivated or Pre-Registered.

Green status indicates profile is ACTIVE. To have a profile in an Active state requires the SMS to be sent and the User reply with their surname.



Orange status indicates profile is REGISTERED. To have a profile in a Registered state requires the SMS to be sent to the User however they are yet to reply with their surname.



Jeremy Martin

Grey status indicates profile is DEACTIVATED. To have a profile in a Deactivated state requires the profile to have once been in a Registered or Activate status. A JESI User with the correct permission level has manually deactivated the User. The User no longer has access to JESI.



Jeremy Martin

Black status indicates profile is PRE-REGISTERED. To have a profile in a Pre-Registered state requires the profile to have been added to JESI however no activation SMS nor email has been sent.

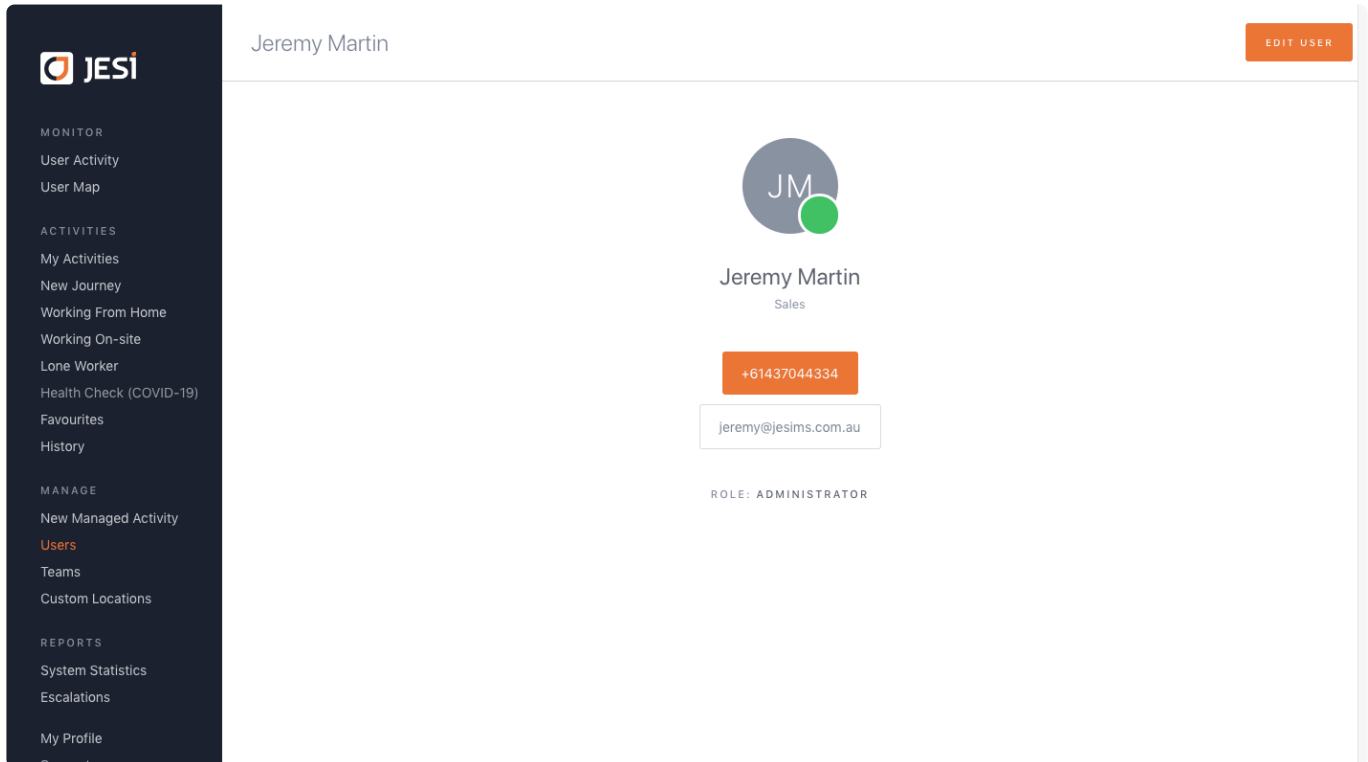


Jeremy Martin

Sales

10.4. Amending a User Profile

Click on 'Users', found in the left hand side menu and search for the User you would like to Edit.



The screenshot shows the JESI user interface. On the left is a dark sidebar menu with the JESI logo at the top. The menu is organized into sections: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), REPORTS (System Statistics, Escalations), and My Profile (Support). The 'Users' option is highlighted in orange. The main content area displays the profile for 'Jeremy Martin'. At the top of this area, the name 'Jeremy Martin' is shown on the left and an 'EDIT USER' button is on the right. The profile itself features a circular avatar with the initials 'JM' and a green accent. Below the avatar, the name 'Jeremy Martin' and the role 'Sales' are listed. Further down, there is an orange button with the phone number '+61437044334' and a white button with the email address 'jeremy@jesims.com.au'. At the bottom of the profile section, it states 'ROLE: ADMINISTRATOR'.

Click on EDIT USER, found in the top right hand corner.

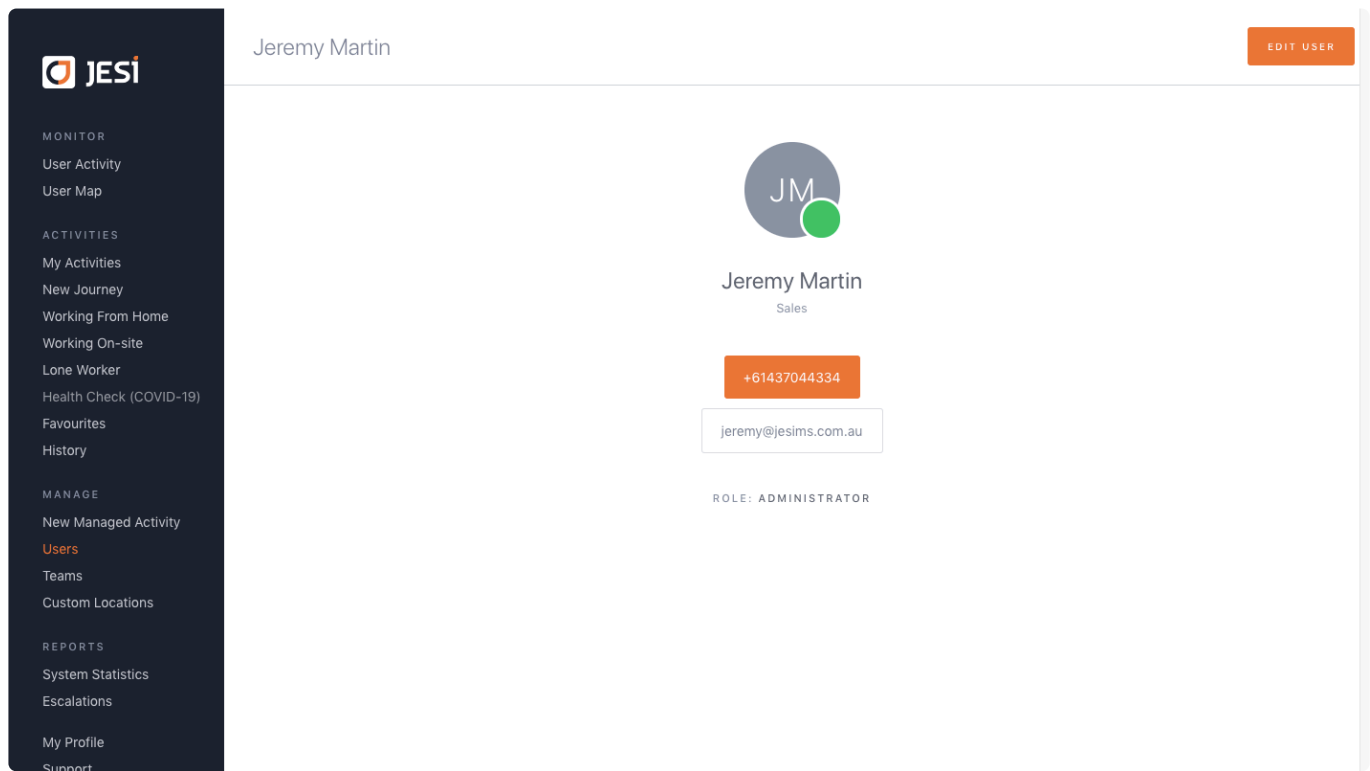
When in the User Profile you can edit contact details, add to an existing Team, reset password and change permission levels.

When you are happy with your changes simply press SAVE in the top right hand corner.

[Click here to watch video](#)

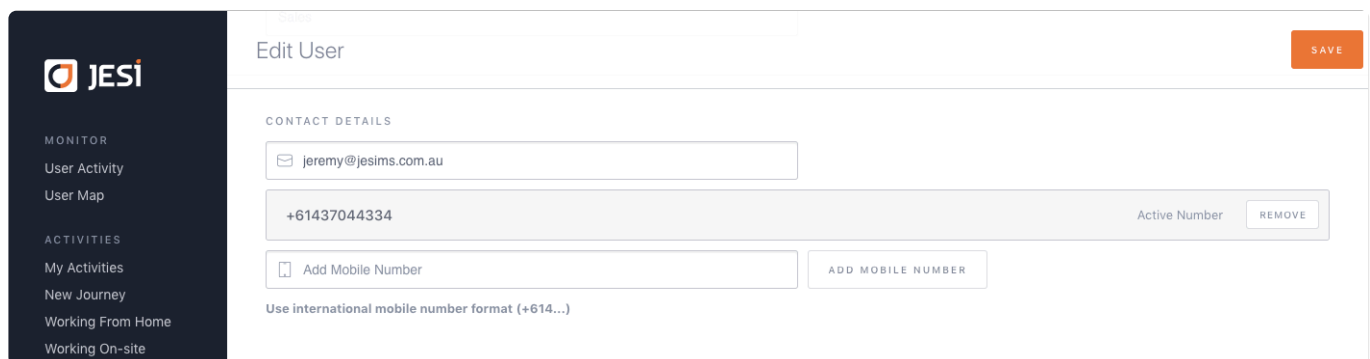
10.5. Adding Additional Mobile Numbers

Click on 'Users', found in the left hand side menu and search for the User for whom you would like to add an additional phone number – click on EDIT USER, found in the top right hand corner.



The screenshot shows the JESI user profile page for Jeremy Martin. On the left is a dark sidebar menu with the JESI logo at the top. The menu is divided into sections: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations). At the bottom of the sidebar are links for My Profile and Support. The main content area has a header with the user's name 'Jeremy Martin' and an 'EDIT USER' button. Below this is a profile card showing a circular avatar with 'JM', the name 'Jeremy Martin', the role 'Sales', a mobile number '+61437044334', and an email address 'jeremy@jesims.com.au'. At the bottom of the card, it says 'ROLE: ADMINISTRATOR'.

Scroll down to CONTACT DETAILS and add the additional mobile number in the left hand field.



The screenshot shows the 'Edit User' page in JESI. The sidebar menu is the same as in the previous screenshot, but the 'Users' option is highlighted. The main content area has a header with 'Edit User' and a 'SAVE' button. Below this is a section titled 'CONTACT DETAILS'. It contains an email field with 'jeremy@jesims.com.au'. Below the email field is a mobile number field with '+61437044334'. To the right of the mobile number field are the labels 'Active Number' and a 'REMOVE' button. Below the mobile number field is a text input field with a plus icon and the text 'Add Mobile Number'. To the right of this field is a button labeled 'ADD MOBILE NUMBER'. At the bottom of the section, there is a note: 'Use international mobile number format (+614...)'. The 'SAVE' button is in the top right corner.

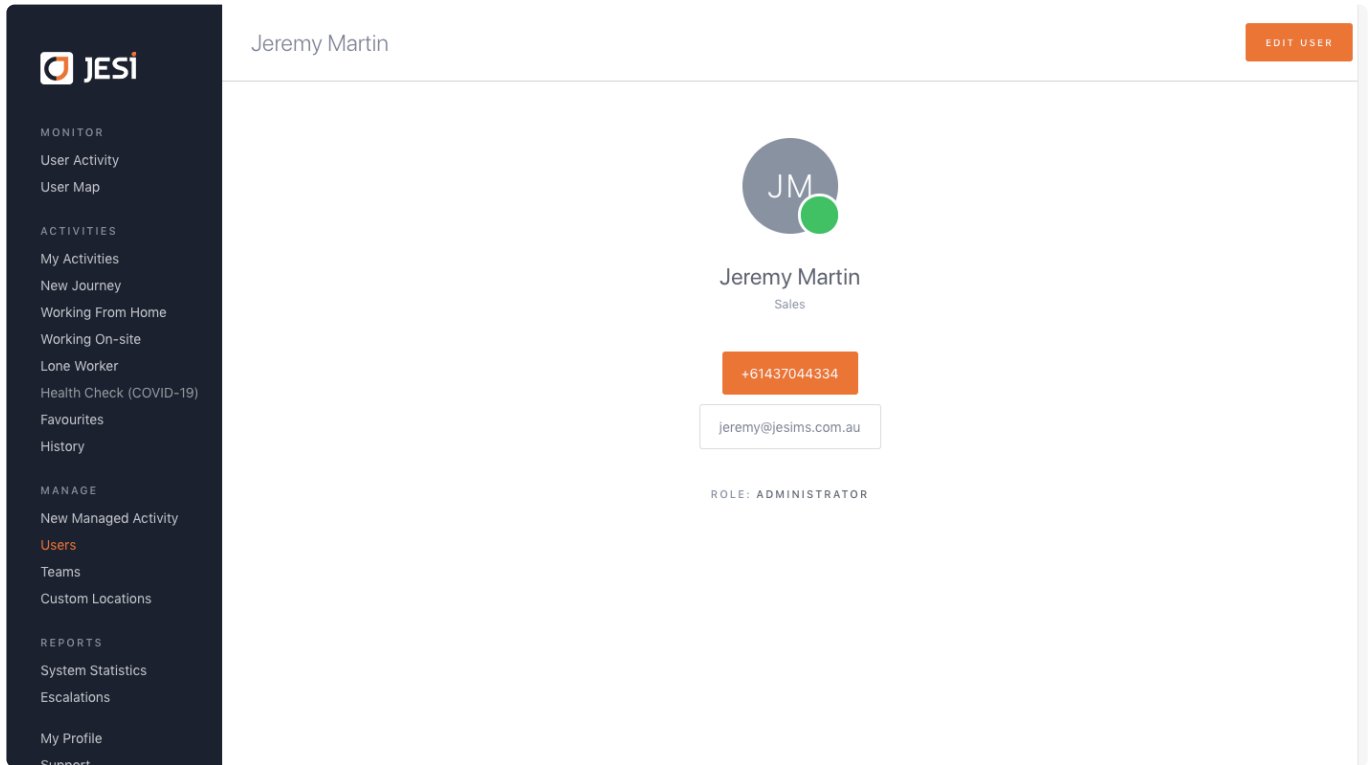
Save it by clicking ADD MOBILE NUMBER.

The User can then go to their profile and select the mobile phone number they would like JESI to send the SMS reminders to, for Check-In.

10.6. Adding a User to a Team

Click 'Users', found in the left hand side menu and search for the User who needs to be added to a Team.

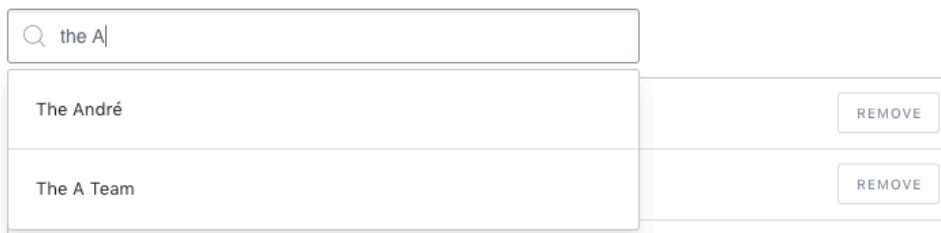
Click EDIT USER, found in the top right hand corner.



The screenshot shows the JESI user profile page for Jeremy Martin. On the left is a dark sidebar menu with categories: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), REPORTS (System Statistics, Escalations), My Profile, and Support. The 'Users' option is highlighted. The main content area shows the user's name 'Jeremy Martin' at the top right with an 'EDIT USER' button. Below is a profile card with a circular avatar containing 'JM', the name 'Jeremy Martin', the role 'Sales', a phone number '+61437044334', and an email 'jeremy@jesims.com.au'. At the bottom of the card, it says 'ROLE: ADMINISTRATOR'.

Scroll down to the TEAMS section. Start typing the Team name and if the Team is active, it will appear.

TEAMS



The screenshot shows a search interface for teams. At the top is a search bar with a magnifying glass icon and the text 'the A'. Below the search bar is a list of search results. The first result is 'The André' and the second is 'The A Team'. To the right of each result is a 'REMOVE' button.

The User will be added to the Team selected. If this is the User's Default Team select SET AS DEFAULT.

Alternatively a User can be added from a Team page. Select Teams, from the left hand side menu and from the search field at the top, type the Team required.

Search Team Search Member or Escalation Contact 2 Statuses Selected

NEW TEAM

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES
Alexander Drilling	✓	✓	●	●			
Default Advanced TRA (V2)	✓	●	●				

RISK ASSESSMENTS

Default Advanced TRA (V2)

MEMBERS

Jeremy Martin JoJo Walter Phil Martin Jeremy Martin

Joe Hoolahan Joe Hoolahan -... Kathy Wilson Luke Donné Michelle Ryan

EDIT TEAM

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES
Default Basic TRA	✓	●	●	●			
Default Intermediate TRA	✓	●	●	●			
Devs - ATSys Intermediate TRA	✓						
Devs - Advanced TRA	✓	●	●	●			
Devs - Conditional WFH	✓	●					
Devs - EW Surat Basin TRA	✓	●					
Devs - Intermediate TRA	✓	●					

Click on EDIT TEAM.

Scroll down to TEAM MEMBERS and commence typing in the User that needs to be added to the Team. Select the User from the dropdown and press SAVE.

Edit Team

15 minutes after Check-In

DELETE LEVEL

Add an Escalation Contact

Jeremy Martin REMOVE

ADD ESCALATION LEVEL

TEAM MEMBERS

JoJo

JoJo Walter

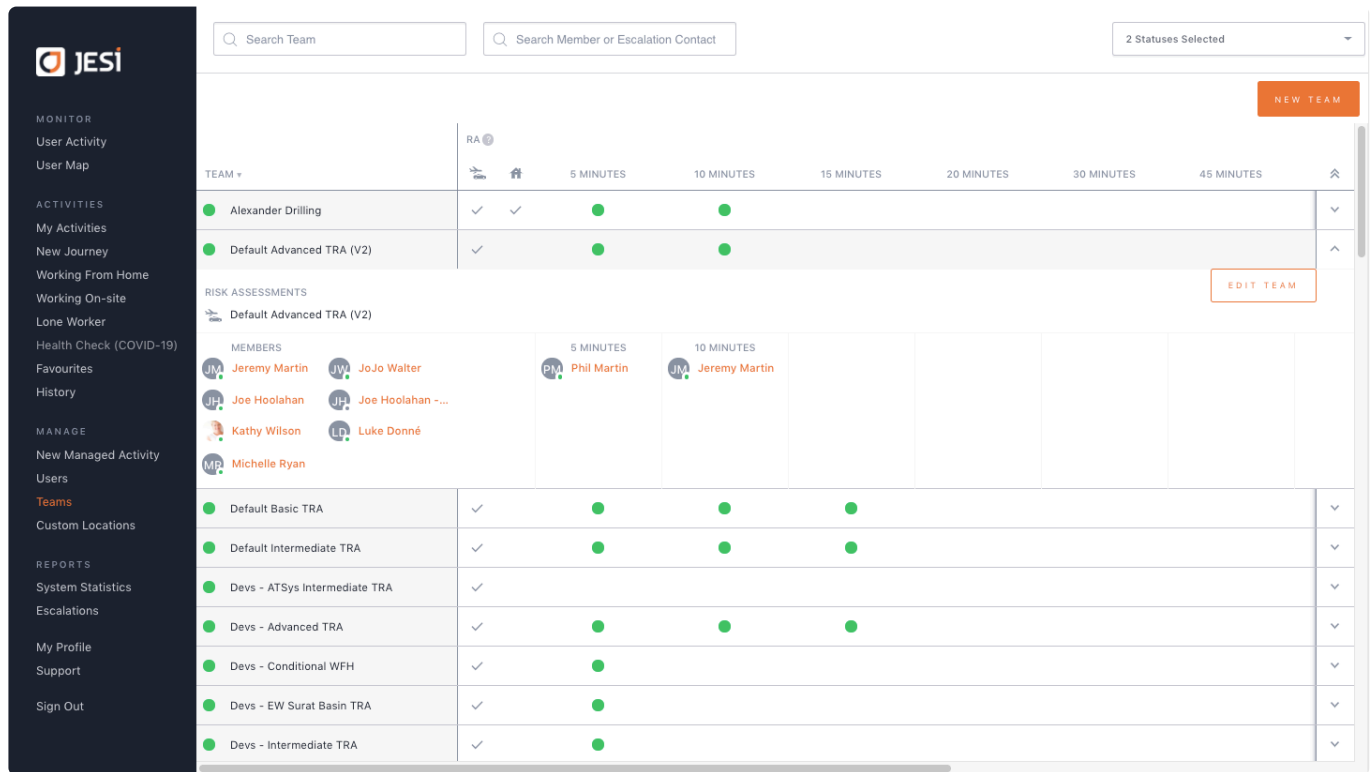
JoJo Zander

Kathy Wilson REMOVE

Phil Martin REMOVE

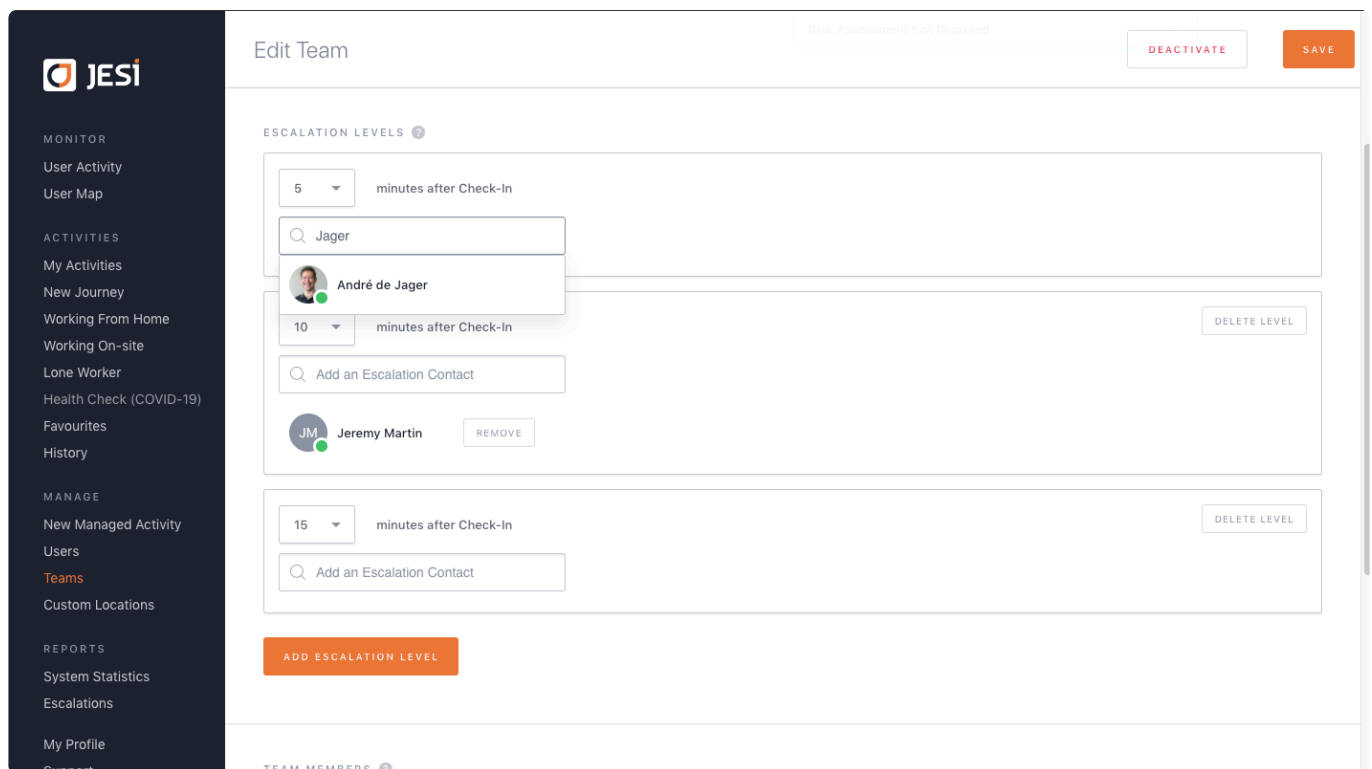
10.7. Adding a User as an Escalation Contact

Click on 'Teams', found in the left hand side menu and search for the required Team. Click EDIT TEAM.



The screenshot shows the JESI Teams page. On the left is a dark sidebar with the JESI logo and a menu with sections: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), and REPORTS (System Statistics, Escalations, My Profile, Support, Sign Out). The 'Teams' option is highlighted. The main area has a search bar for 'Search Team' and 'Search Member or Escalation Contact', and a dropdown for '2 Statuses Selected'. Below this is a table of teams with columns for team name, RA, and time intervals (5, 10, 15, 20, 30, 45 minutes). The table lists teams like 'Alexander Drilling', 'Default Advanced TRA (V2)', 'Default Basic TRA', 'Default Intermediate TRA', 'Devs - ATSys Intermediate TRA', 'Devs - Advanced TRA', 'Devs - Conditional WFH', 'Devs - EW Surat Basin TRA', and 'Devs - Intermediate TRA'. An 'EDIT TEAM' button is visible next to the 'Default Advanced TRA (V2)' team. Below the table, there is a section for 'RISK ASSESSMENTS' and 'MEMBERS' for the selected team, showing a list of team members with their names and profile pictures.

Scroll down the page to ESCALATION LEVELS. Here, you can edit, delete or add Escalation Contacts and Levels as required.



The screenshot shows the 'Edit Team' page in JESI. The sidebar is the same as in the previous screenshot. The main area is titled 'Edit Team' and has a 'Risk Assessment Not Required' message. There are 'DEACTIVATE' and 'SAVE' buttons. Below this is the 'ESCALATION LEVELS' section, which contains three rows of escalation levels. Each row has a dropdown for minutes (5, 10, 15) and a text input for 'minutes after Check-In'. The first row shows '5 minutes after Check-In' with a search bar containing 'Jager' and a dropdown showing 'André de Jager'. The second row shows '10 minutes after Check-In' with a search bar containing 'Add an Escalation Contact' and a dropdown showing 'Jeremy Martin'. The third row shows '15 minutes after Check-In' with a search bar containing 'Add an Escalation Contact'. There are 'DELETE LEVEL' buttons for each row. At the bottom of the section is an 'ADD ESCALATION LEVEL' button. Below this is the 'TEAM MEMBERS' section, which is partially visible.

****An Escalation Contact must be a member of the Team and also have the correct permission level to be an Escalation Contact. A Team Member cannot be an Escalation Contact.**

To check an Escalation Contacts' permission level, click Users, in the left hand side menu, find the User and confirm their permission level. If a Users' permission level requires amendment, go to ['How to Amend a Users' Details'](#)

****Also ensure the Escalation Contact has an Active profile before assigning them to an Escalation Level. If an Escalation Contact does not have an active profile this may impact the [profile status of the Team](#). If the Team is not Active a User will not be able to create an Activity.**

10.8. Bulk Removal and Replacement of an Escalation Contact from a Team

Click on 'Users', found in the left hand side menu and search for the relevant Escalation Contact. Click on the green tick indicating they are an Escalation Contact. This will list all of the Teams that the Escalation Contact is a member of. Below the Team names there is a REPLACE button, if there are many teams, you may need to scroll.

The screenshot shows the JESI Management Solutions interface. On the left is a dark sidebar with a menu including 'MONITOR', 'ACTIVITIES', 'MANAGE', and 'REPORTS'. The main area has a search bar with 'kat' and filters for '2 User Statuses Selected' and '115 Teams Selected'. Below these are buttons for 'ACTIVATE/SEND SMS' and 'DEACTIVATE'. A table lists users, with 'Kathy Smith' selected. A modal window is open over 'Kathy Smith', showing a 'REPLACE' button. The modal also displays 'Advanced TRA Testing - October'.

Click on the REPLACE button to open the next screen. All of the Teams that the User is an Escalation Contact for, will be listed, with the Users' name pre-populated against each Team. Next to the Users' name there is a REMOVE button.

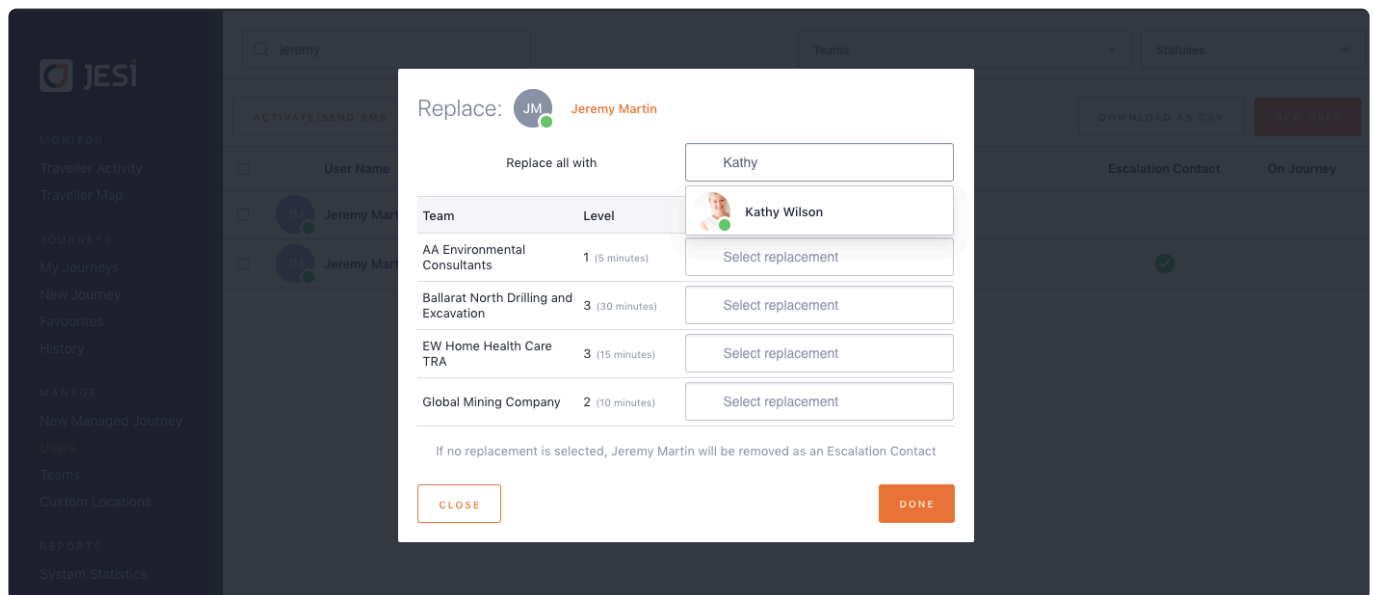
The screenshot shows the 'Replace' modal in the JESI Management Solutions interface. The modal lists teams and their replacement users. The teams are: AA Environmental Consultants, Ballarat North Drilling and Excavation, EW Home Health Care TRA, and Global Mining Company. The replacement user for all teams is 'Jeremy Martin'. A 'REPLACE' button is visible at the bottom of the modal.

Team	Level	Replacement User
AA Environmental Consultants	1 (5 minutes)	Jeremy Martin
Ballarat North Drilling and Excavation	3 (30 minutes)	Jeremy Martin
EW Home Health Care TRA	3 (15 minutes)	Jeremy Martin
Global Mining Company	2 (10 minutes)	Jeremy Martin

At the top of the page there is also a REMOVE button. To replace the Escalation Contact from ALL Teams click REMOVE at the top of the page. To replace the Escalation Contact from select Teams

simply click REMOVE next to the relevant Team in the list below.

Ensure when replacing the Escalation Contact with a new person that the person has the correct permission level within JESI to be an Escalation Contact – a Team Member permission level cannot be an Escalation Contact.



- Note: Administrators have the permission to remove/replace Escalation Contacts with any of the Company JESI Account Teams, however a Manager can only remove/replace Escalation Contacts for the team/s that they are members of.

11. Manage Teams

Each User in the JESI Company Account is required to be a member of at least one Team. The Teams consist of Users and Escalation Contacts. The Escalation Contacts that have been identified for each Team receive Escalation Notifications if a User fails to Check-In.

Within 'Teams', found in the left hand side menu, you can add / remove Users, add / remove Escalation Contacts, assign / remove Risk Assessments, modify time frames for Escalation Notifications.

11.1. Creating a New Team

If a new Team is required, click on 'Teams' found in the left hand side menu.

Click on 'NEW TEAM'

The screenshot shows the JESI interface with a sidebar menu on the left. The main content area displays a table of teams. At the top right, there is a 'NEW TEAM' button. The table has columns for 'TEAM', 'RA', and time intervals: '5 MINUTES', '10 MINUTES', '15 MINUTES', '20 MINUTES', and '30 MINUTES'. Each team row shows a green dot indicating status and a dropdown arrow on the right.

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES
Alexander Drilling	✓	●	●			
Default Advanced TRA (V2)	✓	●	●			
Default Basic TRA	✓	●	●	●		
Default Intermediate TRA	✓	●	●	●		
Devs - ATSys Intermediate TRA	✓					

Note:

- When setting up a new Team you will need to assign members to the Team.
- You will also need to set up Escalation Contacts for the Team.
- An Escalation Contact must be added as a member of the Team before they are assigned as an Escalation Contact.
- When assigning Escalation Contacts to the Team the Escalation Contact must have a Monitor, Manager or Administrator permission level in JESI and they MUST have an active profile.
- Once the new Team has been created, it will appear within the TEAM list.

The screenshot shows the 'New Team' form. It includes fields for 'TEAM NAME' and 'TRAVEL RISK ASSESSMENT' (set to 'Risk Assessment Not Required'). There is also a 'WORKING FROM HOME RISK ASSESSMENT' field (also set to 'Risk Assessment Not Required'). Below these is the 'ESCALATION LEVELS' section, which shows a dropdown set to '5 minutes after Check-In' and a search bar to 'Add an Escalation Contact'. An 'ADD ESCALATION LEVEL' button is present. At the bottom, the 'TEAM MEMBERS' section has a search bar to 'Add a Team Member'. A 'SAVE' button is located at the top right of the form.

You can add up to a maximum of 11 Escalation Contact Levels or a maximum of 180 minutes. You can add as many Escalation Contacts as you like to each level.

'Escalation Contact' is a team contact who will receive and action Escalation Notifications.

Click 'Save'.

Note:

- If an Escalation Contact is not listed within the dropdown options, they may not have the correct permission level within JESI, – refer to the 'Manage Users' section of this manual.

[Click here to watch video](#)

11.2. Deactivating a Team

Click on 'Teams' found in the left hand side menu and select the Team that requires Deactivating.

The screenshot shows the JESI Teams management interface. The left sidebar contains the following menu items: MONITOR (User Activity, User Map), ACTIVITIES (My Activities, New Journey, Working From Home, Working On-site, Lone Worker, Health Check (COVID-19), Favourites, History), MANAGE (New Managed Activity, Users, Teams, Custom Locations), REPORTS (System Statistics, Escalations), My Profile, Support, and Sign Out. The main area has a search bar for teams and members, a dropdown for 2 statuses selected, and a 'NEW TEAM' button. The table lists teams with columns for status and time intervals (5, 10, 15, 20, 30, 45 minutes). The 'Default Advanced TRA (V2)' team is selected, and the 'EDIT TEAM' button is visible.

TEAM	RA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES	45 MINUTES
Alexander Drilling	✓	✓	●	●			
Default Advanced TRA (V2)	✓	●	●				

RISK ASSESSMENTS

Default Advanced TRA (V2)

MEMBERS

MEMBERS	5 MINUTES	10 MINUTES
Jeremy Martin	●	●
JoJo Walter		
Phil Martin		
Joe Hoolahan		
Joe Hoolahan - ...		
Kathy Wilson		
Luke Donné		
Michelle Ryan		

Default Basic TRA

Default Intermediate TRA

Devs - ATSys Intermediate TRA

Devs - Advanced TRA

Devs - Conditional WFH

Devs - EW Surat Basin TRA

Devs - Intermediate TRA

Once you have clicked on the Team that requires Deactivating and select EDIT TEAM.

The screenshot shows the JESI Teams management interface. The left sidebar contains the following menu items: MONITOR (Traveller Activity, Traveller Map), JOURNEYS (My Journeys, New Journey, Favourites, History), MANAGE (New Managed Journey, Users, Teams, Custom Locations). The main area has a search bar, a 'Choose a User' dropdown, and a 'Statuses' dropdown. The table lists teams with columns for status and time intervals (5, 10, 15, 20, 30 minutes). The 'Default Advanced TRA' team is selected, and the 'EDIT TEAM' button is visible.


TEAM	TRA	5 MINUTES	10 MINUTES	15 MINUTES	20 MINUTES	30 MINUTES
AA Environmental Consultants		●	●	●		
Alexander	✓					
Ballarat North Drilling and Excavation				●	●	
Default Advanced TRA	✓	●	●		●	

RISK ASSESSMENT Default Advanced TRA

MEMBERS

MEMBERS	5 MINUTES	10 MINUTES	20 MINUTES
Jeremy Martin	●	●	
Kathy Wilson			
Joe Hoolahan	●	●	
Joe Hoolahan			
Alex Scott			●
Joe Hoolahan			●

Click on the DEACTIVATE button and then press SAVE.



MONITOR

User Activity

User Map

ACTIVITIES

My Activities

New Journey

Working From Home

Working On-site

Lone Worker

Favourites

History

MANAGE

New Managed Activity

Users

Teams

Custom Locations

Edit Team

DEACTIVATE

SAVE

TEAM NAME

Devs - Advanced TRA

TRAVEL RISK ASSESSMENT ⓘ

Default Advanced TRA

WORKING FROM HOME RISK ASSESSMENT ⓘ


Risk Assessment Not Required

ESCALATION LEVELS ⓘ


5

minutes after Check-In

Add an Escalation Contact

 André de Jager

REMOVE

 JoJo Zander

REMOVE

Please note that you will not be able to Deactivate a Team if any of the members of the Team are currently on an Active Activity nor will you be able to delete the Team out of JESI permanently. You can Deactivate but not Delete.

11.3. Amending a Team

Once a Team is created, only an Administrator or a Manager can amend the following actions:

1. Add or remove members of the team
2. Add or remove Escalation Contacts
3. Modify Escalation times
4. Add or delete Escalation Levels
5. Activate or Deactivate your Company Risk Assessments (If a Risk Assessment is not enabled please contact a [JESI Customer Solutions Representative](#))

Click on 'Teams' found in the left hand side menu and select the Team that requires editing by clicking on the drop down arrows from the right hand side, or click on the Team name.

The screenshot shows the JESI Teams management interface. The left sidebar contains the following menu items: MONITOR (Traveller Activity, Traveller Map), JOURNEYS (My Journeys, New Journey, Favourites, History), and MANAGE (New Managed Journey, Users, Teams, Custom Locations). The main area displays a table of teams with columns for TEAM, TRA, and various escalation times (5, 10, 15, 20, 30 MINUTES). The 'Default Advanced TRA' team is selected. Below the table, the 'MEMBERS' section shows a list of team members with their names and profile pictures. An 'EDIT TEAM' button is visible in the top right corner of the team details section.

Click EDIT TEAM.

The screenshot shows the 'Edit Team' interface. The top section shows the 'TEAM NAME' and 'RISK ASSESSMENT' dropdowns. The 'TEAM MEMBERS' section displays a list of team members with their names and profile pictures. Callouts provide instructions: 'Start typing users name to add new team member.' points to the 'Add a Team Member' search bar; 'Click on REMOVE to remove a team member.' points to the 'REMOVE' button next to a team member; and 'Click on dropdown to activate / de-activate Trip Risk Assessment.' points to the 'RISK ASSESSMENT' dropdown.

Traveller Map

JOURNEYS

- My Journeys
- New Journey
- Favourites
- History

MANAGE

- New Managed Journey
- Users
- Teams**
- Custom Locations

REPORTS

- System Statistics
- Escalations

My Profile

- Support
- Sign Out

Escalations

10 minutes after check in **Amend escalation time frames.** DELETE LEVEL

Add an Escalation Contact

Kathy Wilson REMOVE

15 minutes after check in **To add another escalation contact start typing the contacts name here, and select from drop down.** DELETE LEVEL

Add an Escalation Contact

JH Joe Hoolahan REMOVE

ADD ESCALATION LEVEL **To add another escalation level click here.**

[Click here to watch video](#)

11.4. Team Profile Status

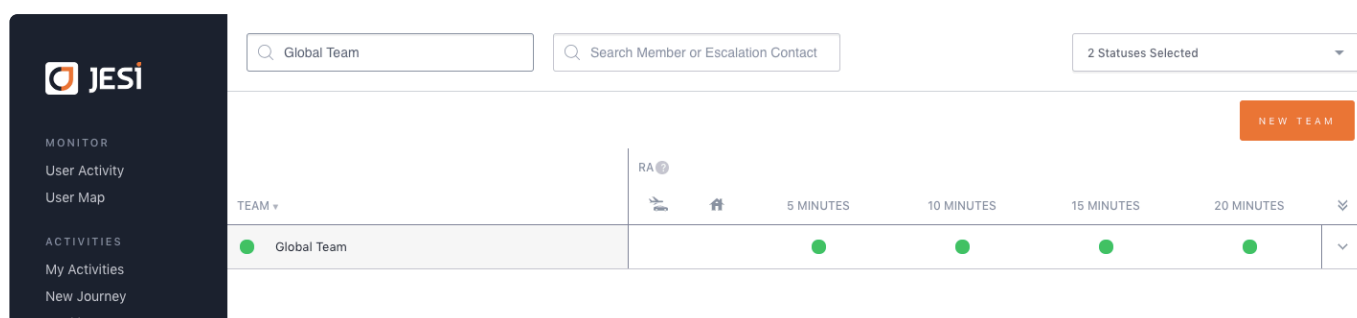
The profile icon of the Team identifies, by colour code, whether the Team profile is Active, Registered or Deactivated.

A Team status can be either Grey, Orange or Green.

TEAM

	AAA Aballarat South Drilling
	AA TESTING TEAM TAB
	Alexander

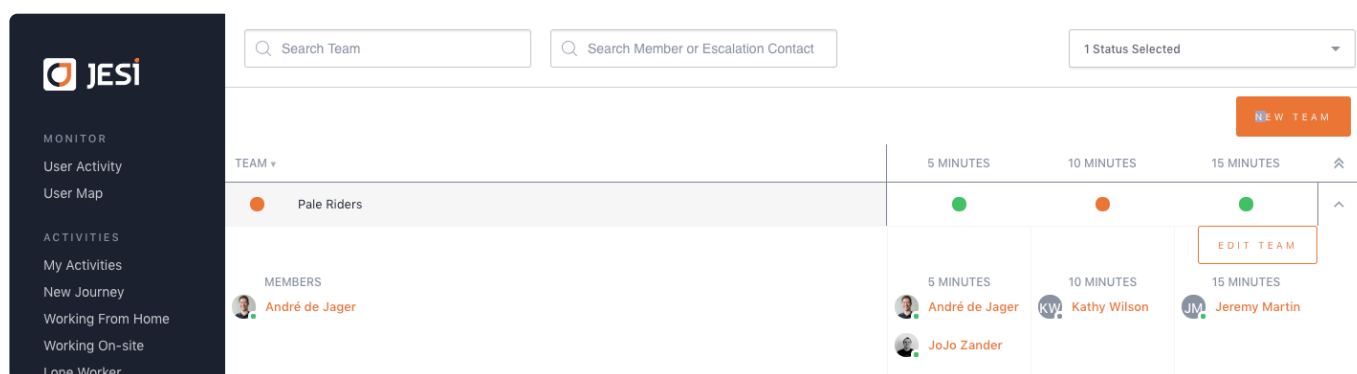
Green status indicates Team profile is ACTIVE. To have a Team profile in an Active state requires at least one Escalation Contact on each level to have [activated their User profiles](#).*



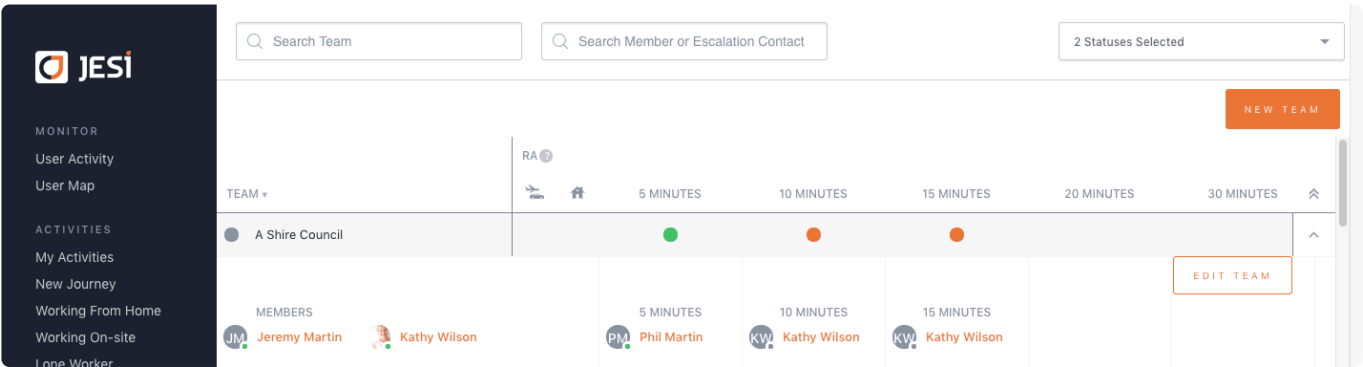
The above image identifies that at least one Escalation Contact on each level has an activated JESI profile. This is shown by green circles under the Escalation Level time frames. There may be a Deactivated or Registered Escalation Contact assigned to an Escalation Level, however there must be at least one Active Escalation Contact on that same level for that Escalation Level to be Activated.

Orange status indicates Team profile is REGISTERED. When a Team profile has a REGISTERED status this indicates that not all Escalation Contacts assigned to the Team have an [activated JESI User profile](#)..

*When a Team is in a REGISTERED state no Team members will be able to create an Activity.



The above image identifies Escalation Contact, Kathy Wilson, on Escalation Level 2 (10mins) does not have an Activated JESI profile. Kathy will need to Activate her JESI profile, doing so will change the status of the team to Active.



Grey status indicates Team profile has been DEACTIVATED. To have a profile in a Deactivated state requires a JESI User with the correct permission level to [Deactivate the Team](#). When a Team is in a Deactivated state, no Team members can create an Activity.

12. Managing Custom Locations

The location database in JESI is attached to Google Maps and incorporates an extensive global library of locations. However most Companies have their own locations that are unique to their business requirements. Individual locations can be created if the User has Administration access. However if a bulk upload of locations is required, the JESI Customer Solutions Team can administer.

A Company unique Custom Location remains secure to the Company JESI Account and is only available for those Users to access.

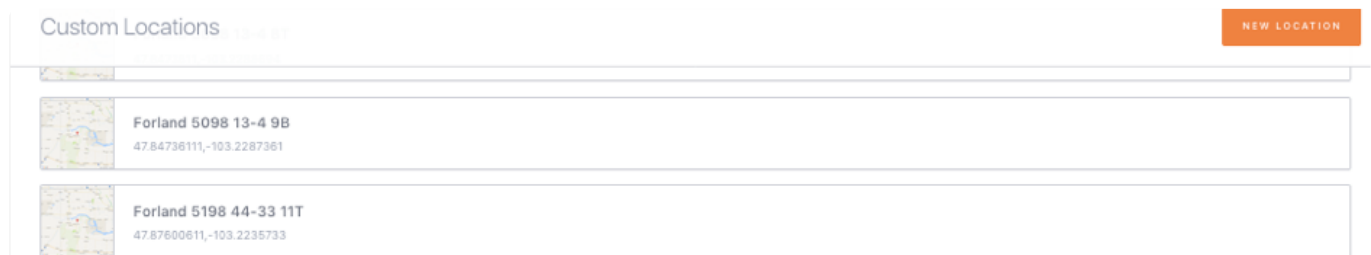
12.1. Creating a Custom Location

Custom Locations are helpful if you would like to create your own personal locations or where an Activity location has no street address or location data.

To create a Custom Location,

- Select 'Custom Locations' from the left hand side menu
- Select 'New Location' in the top right
- On the map displayed you can zoom in and navigate to the location you wish to create / Alternatively if the Longitude & Latitude details are known they can be entered into the boxes below and the location will be displayed on the map – please ensure the latitude and longitude are entered in decimal degrees.
- Click onto the map to drop a pin and mark your location. If you don't click on the exact location you desire, you can just click again on the map to move the pin.
- Once the desired location is selected, you must then name the location in the box below the map, then click SAVE.
- Your new Custom Location will now be displayed in the Custom Location list.

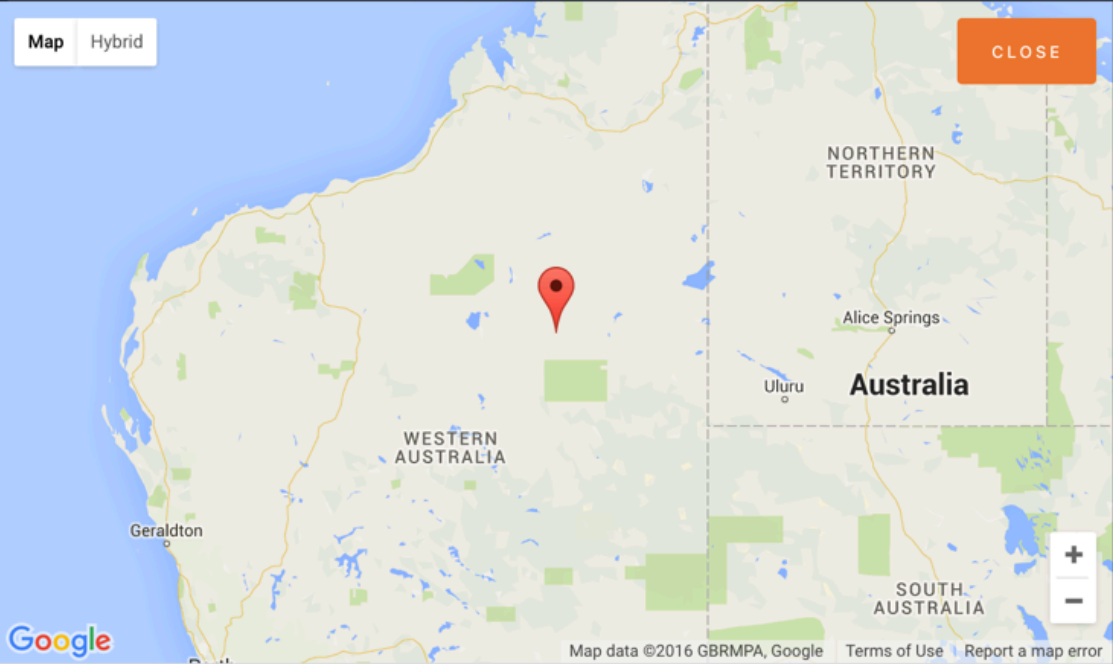
Note, when trying to create an Activity using a Custom Location, you can just type the name of the Custom Location into the address search box and the location will be displayed at the top of the list



Custom Locations

Map Hybrid

CLOSE



Google

Map data ©2016 GBRMPA, Google Terms of Use Report a map error

Custom Location Name

Remote Area 1

Latitude

-23.76523688975866

Longitude

124.97154235839844

SAVE

[Click here to watch video.](#)

Custom Locations

Custom Locations are helpful if you would like to create your own personal locations or where a location you may be travelling to has no street address or location data.

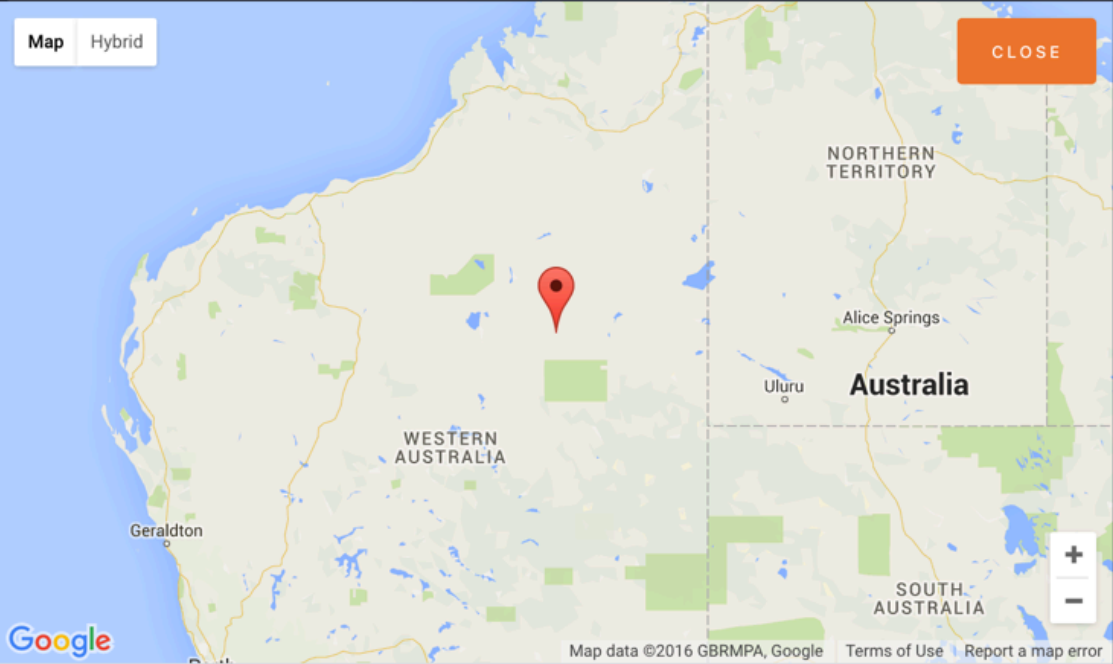
To create a custom location,

- Select Custom Locations from the left menu
- Select “New Location” in the top right
- On the map displayed you can zoom in and navigate to the location you wish to create / Alternatively if the Longitude & Latitude details are known they can be entered into the boxes below and the location will be displayed on the map – please ensure the latitude and longitude are entered in decimal degrees.
- Click onto the map to drop a pin and mark your location. If you don’t click on the exact location you desire, you can just click again on the map to move the pin.
- Once the desired location is selected, you must then name the location in the box below the map, then click save.
- Your new custom location will now be displayed in the custom location list.
- Please note when trying to create a journey using a custom location, you can just type the name of the custom location into the address search box and the location will be displayed at the top of the list

Custom Locations

Map Hybrid

CLOSE



Google

Map data ©2016 GBRMPA, Google Terms of Use Report a map error

Custom Location Name

Remote Area 1

Latitude

-23.76523688975866

Longitude

124.97154235839844

SAVE

13. Integrations

JESI currently supports the ability to create API Tokens to allow you to connect to third-party applications and services to interact with the JESI API to extract data and perform authorized actions. API tokens can be used as an alternative to the login credential exchange process and authorize on behalf of a Company (instead of a user)

It is recommended that each third-party application has its own API Token with only the necessary permissions to perform its operations

13.1. How to Generate an API Key

How to Generate an API Key

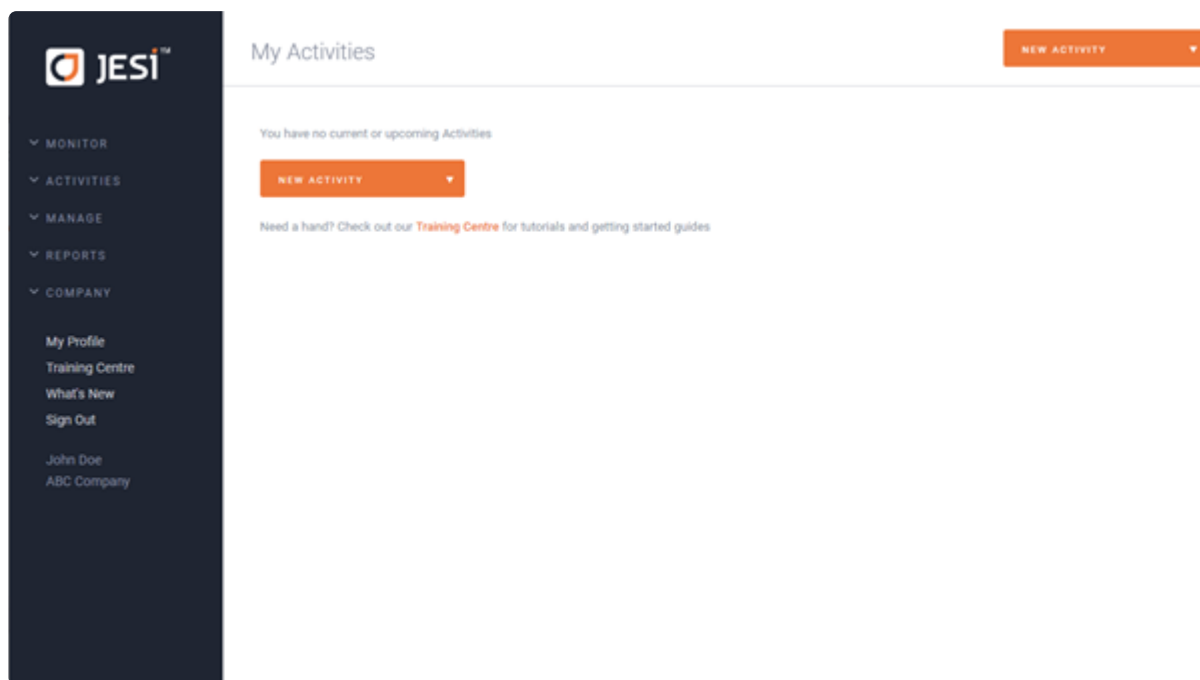
API Tokens function like ordinary authentication tokens. They can be used by third-party applications and services to interact with the JESI API to extract data and perform authorised actions

API tokens can be used as an alternative to the login credential exchange process and authorise on behalf of a Company (instead of a user)

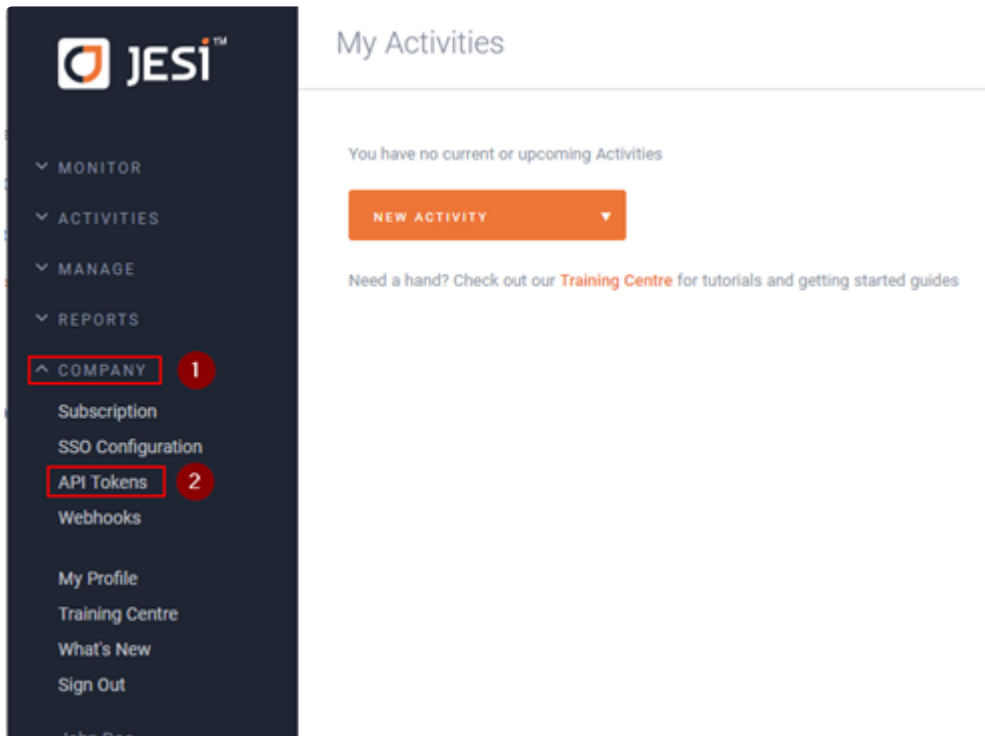
It is recommended that each third-party application has its own API Token with only the necessary permissions to perform its operations

Note: This process can only be accessed by a User with JESI Company Administrator permission level. Alternatively, please contact JESI Customer Success at customersuccess@jesims.com.au

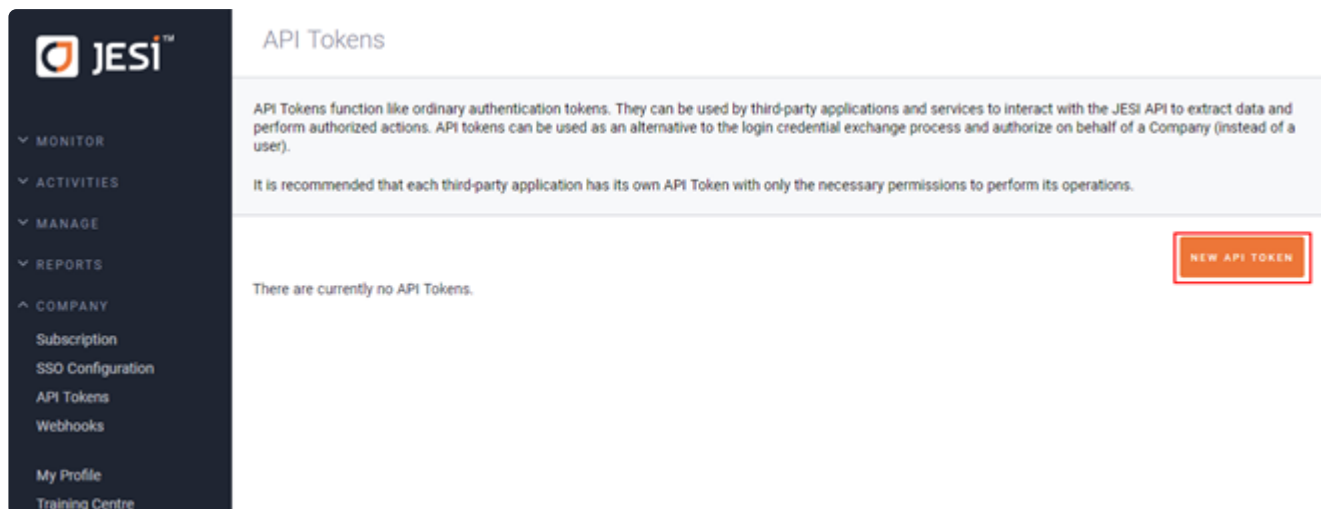
1. Log into JESI using a Company Administrator User Profile



2. On the left side menu, expand **Company (1)** and select **API Tokens (2)**



3. You will be greeted with the API Tokens page. To start creating a new API token. Click the orange 'NEW API TOKEN' button on the right side of the page



4. Select the permissions that your new API key will have. If you are going to use this key purely for reporting, you will need the permissions boxed in red as shown in the image below (1)
Provide a comment description in the 'Comment' field (2) and click 'NEW API TOKEN' (3) to finally generate your API Key

JESI

MONITOR

ACTIVITIES

MANAGE

REPORTS

COMPANY

Subscription

SSO Configuration

API Tokens

Webhooks

My Profile

Training Centre

What's New

Sign Out

John Doe

ABC Company

API Tokens

API Tokens function like ordinary authentication tokens. They can be used by third-party applications and services to interact with the JESI API to extract data and perform authorized actions. API tokens can be used as an alternative to the login credential exchange process and authorize on behalf of a Company (instead of a user).

It is recommended that each third-party application has its own API Token with only the necessary permissions to perform its operations.

New API Token

Select Permissions

Permissions define the extent of access for the API Token

- ☐ Create Webhooks
- ☐ Delete Webhooks
- ☒ View All Journeys
- ☒ View All Teams
- ☒ View All Users
- ☐ View All Webhooks

Comment

What's this API Token used for?

NEW API TOKEN Cancel

- Once finished, an API Token Created screen will appear where it provides summary information about the new token, as well as your token string
Make sure you copy the API Key and paste / store it in a safe location. Once you press the orange **'CLOSE'** button, you will not be able to see the token again

API Token Created

Make sure to copy the new API Token now. You won't be able to see it in full again!

Token:

[illegible]

Permissions:

[View All Journeys](#)[View All Users](#)[View All Teams](#)

Comment:

Reporting

CLOSE

13.2. How to Install the Power BI Application Template

Power BI Application Template

Overview

This document provides step-by-step instructions to set up the JESI Power BI Application (App) Template as a Power BI Administrator. Once set up correctly, the Power BI App can be shared with other users internally assuming the users have been provided with the necessary access (Power BI licence, permissions, etc.).

Requirements

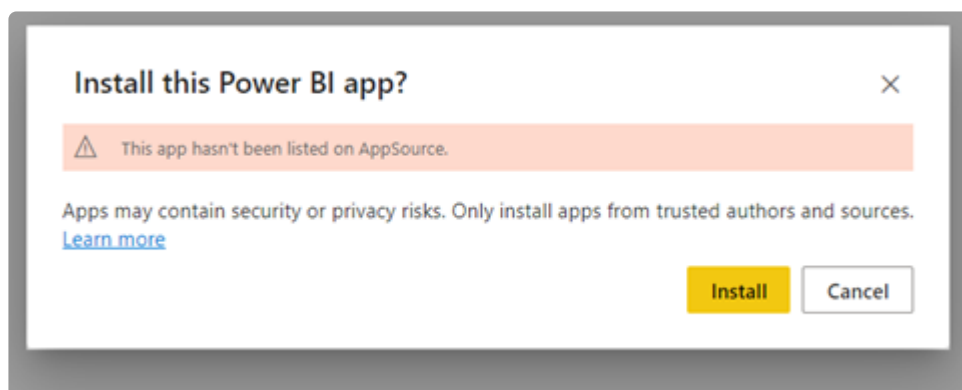
- Power BI Administrator account
- JESI API Key – refer to How to generate API Key document

Requirements

To allow you to connect your data to Power BI, you require an API Key, to learn more about generating an API Key from JESI: [Click here](#)

Installing the JESI Reporting App Template

1. Copy the app link provided by JESI and paste it into your browser address bar. This will lead you to a Power BI page
 - Please reach out to support@jesims.com.au to discuss how this template link can be attained.
2. You will see a prompt to notify you that the app you are trying to access is not available on AppSource. Ignore this and simply click install to start the app installation



Note: Installing this app will install the application as a front end, along with an app workspace as its back end

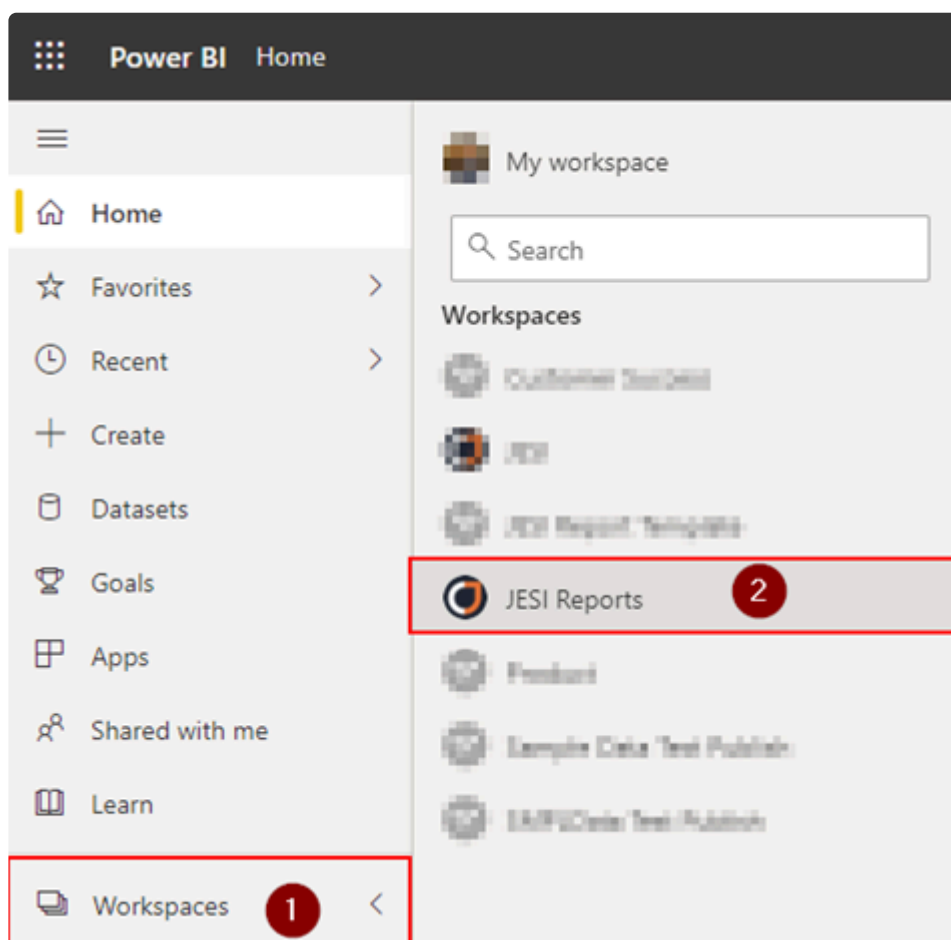
App – Application front end which has the report(s) and data visualisations

App Workspace – The backend for the application which contains the report and the dataset. Only a Power BI Administrator should have access to this workspace as this is where configurations can be modified, such as the data refresh schedule, app name, access, etc

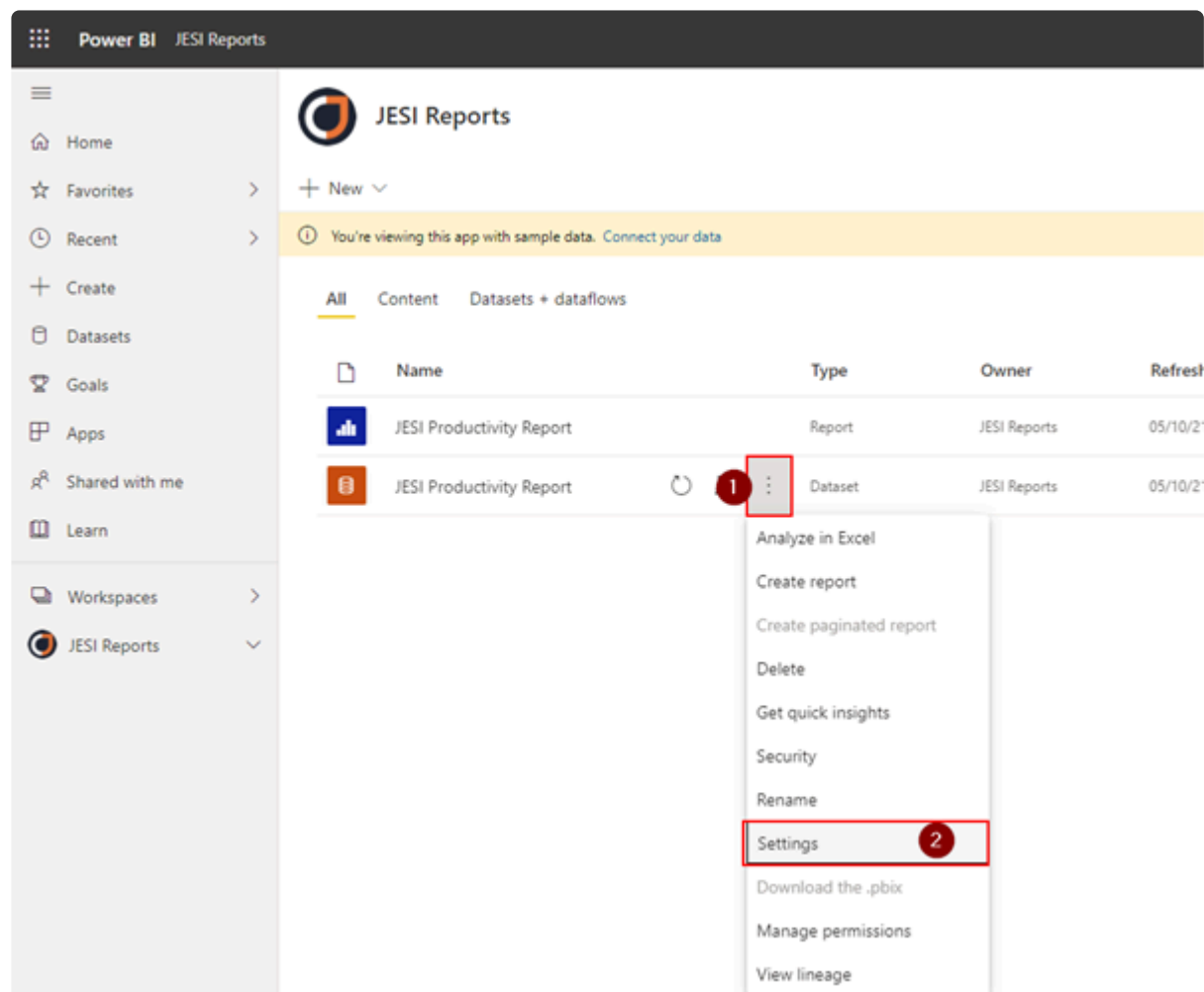
3. Once the application has finished installing, you will be able to see the new application listed in the Apps page. You will also see the new App Workspace in the list of Workspaces. The next step from here is to connect your data

Connect your data and set up Scheduled Refresh

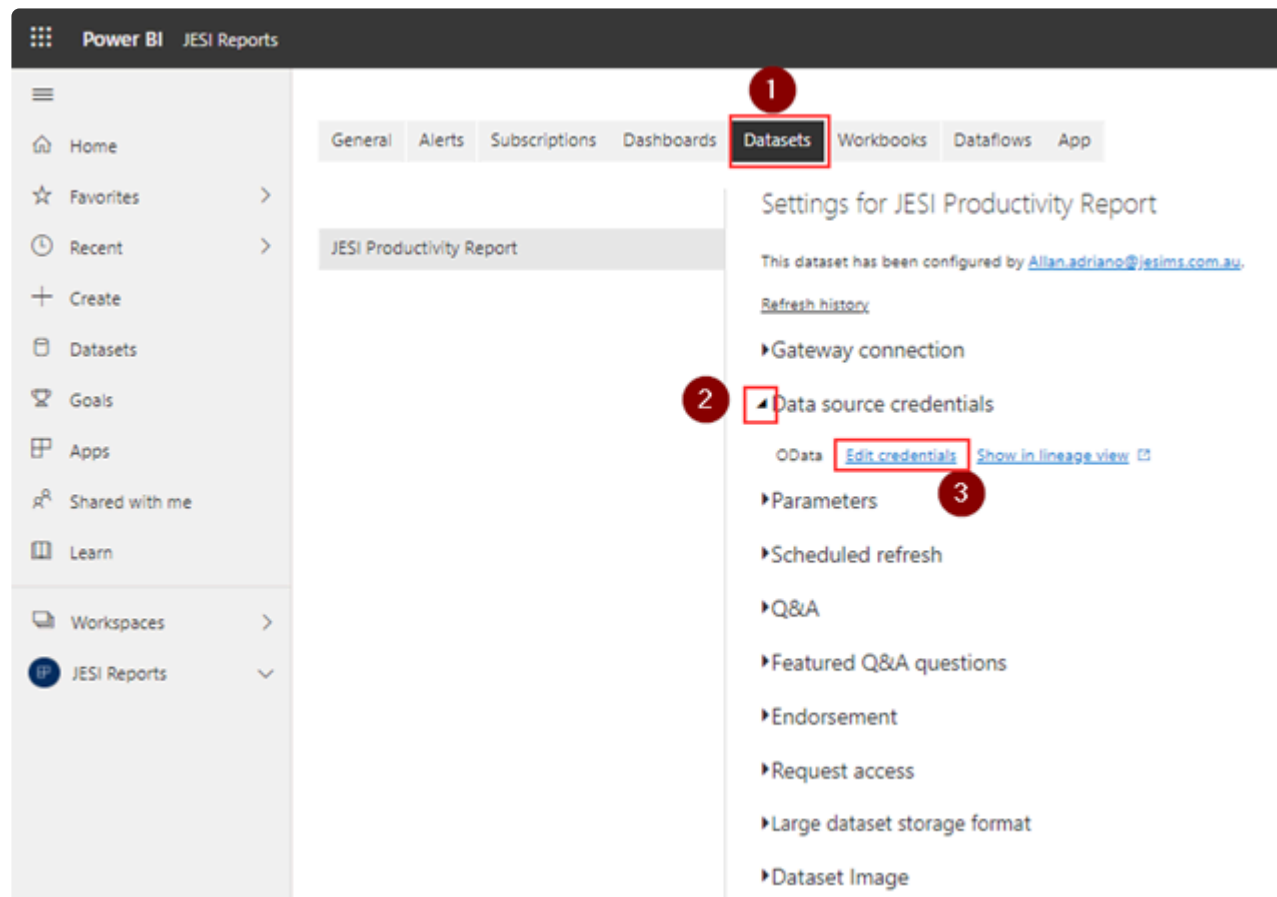
1. On your Power BI Home Page, navigate to your newly installed App's Workspace by clicking '**Workspaces**' (1) then selecting '**JESI Reports**'. This will lead you to the app contents which includes the report and dataset



2. Hover over the dataset component to show an ellipsis. Click the **ellipsis (1)** and select **Settings (2)**



3. You should now be on the dataset configurations page. Click the '**Datasets**' (1) tab on the top of the page. Expand '**Data source credentials**' (2) and click the [Edit credentials](#) (3) link this will take you to the Authentication screen



4. Under the Authentication method field, select '**Basic**' (1). Under the User name field enter the value "**api-key**" (2). Under Password field add your '**JESI API Key that has been generated from within JESI**' (2). Select your preferred Privacy level setting (3) now click '**Sign in**' (4)

Note: We do not recommend enabling 'Skip test connection' – leave this unchecked

Configure JESI Productivity R...

url
https://api.jesi.io/odata/v1

Authentication method
Basic 1

User name
api-key 2

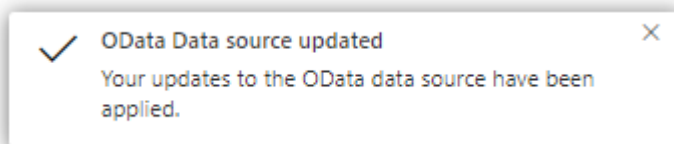
Password
.....

Privacy level setting for this data source
Organizational 3

☐ Skip test connection

4 Sign in Cancel

A pop-up message will appear on the top right side of the page to indicate that the sign in was successful



5. To set the scheduled refresh, expand '**Scheduled refresh**' (1), toggle on '**Keep your data up to date**' (2), and configure the '**Refresh frequency**' (3) to your preference. Once finished, click '**Apply**' (4)

Note: If you want to set up multiple refreshes per day, you can do so by clicking the [Add another time](#) link

Settings for JESI Productivity Report

This dataset has been configured by [\[User Name\]](#)

[Refresh history](#)

► Gateway connection

▲ Data source credentials

OData [Edit credentials](#) [Show in lineage view](#)

► Parameters

1. Scheduled refresh

Keep your data up to date

2. ☒ On

3. Refresh frequency

Daily

Time zone

(UTC+10:00) Brisbane

Time

8 00 AM X

[Add another time](#)

Send refresh failure notifications to

☒ Dataset owner

☐ These contacts:

Enter email addresses

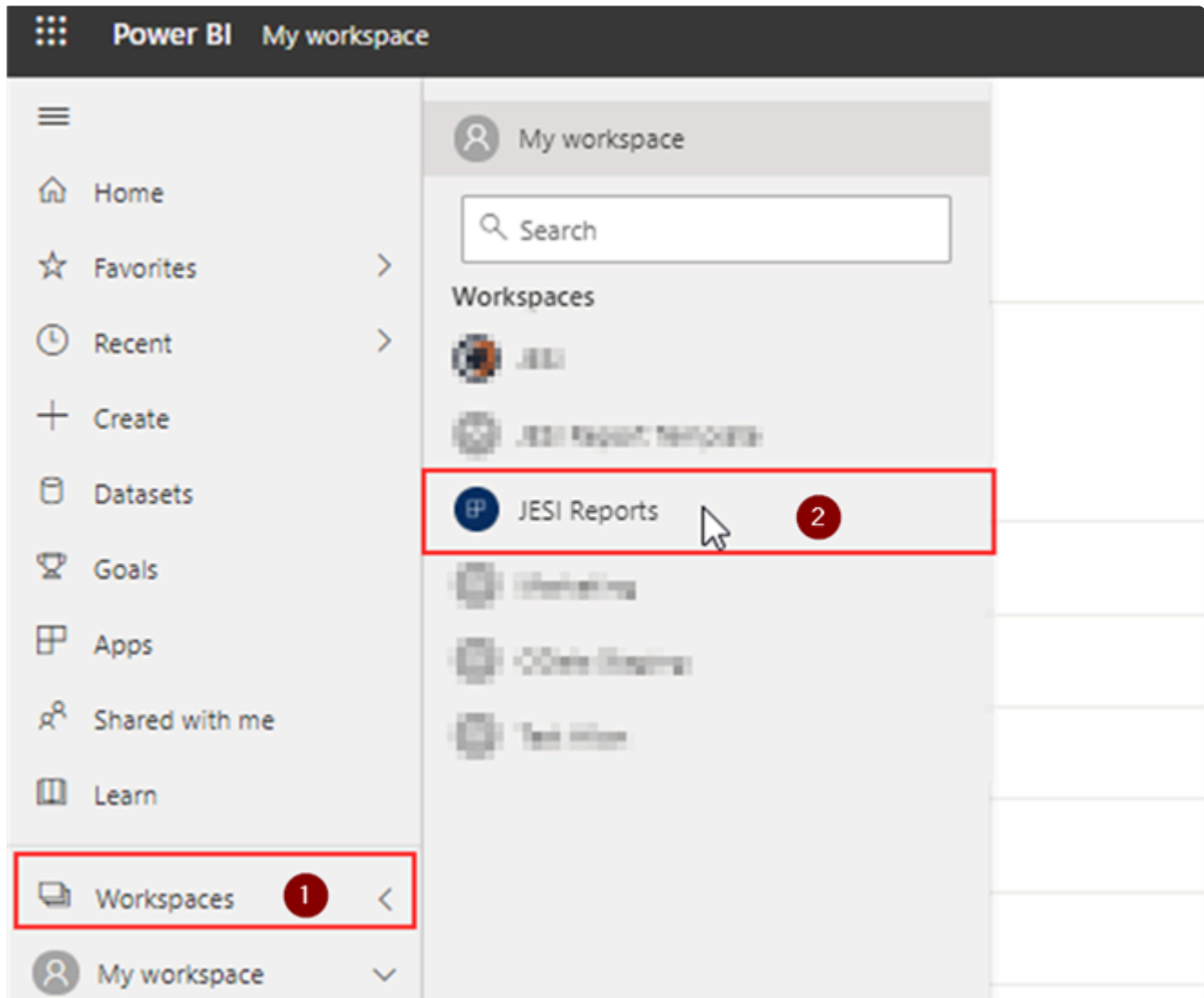
4.

Note: Your dataset refresh limit will depend on the level of your Organisation's Power BI capacity

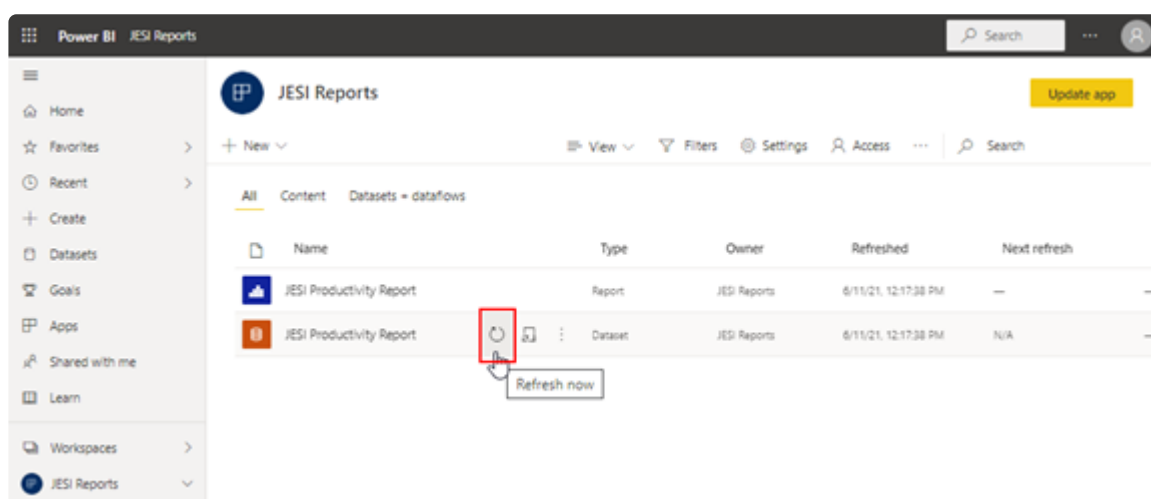
Update and Share the App

The final step is to update the installed App and share it within your Organisation

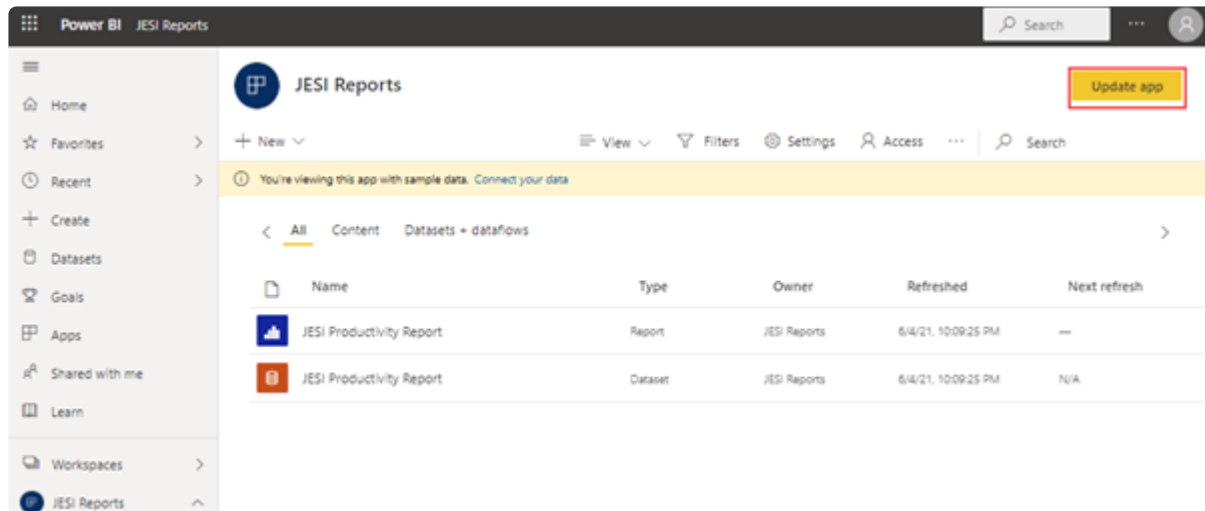
1. To apply all the changes that have been made to the application, head back to the app workspace by clicking '**Workspaces**' (1) then select '**JESI Reports**' (2). This will lead you to the app contents which includes the report and dataset



2. In the App Workspace, hover over the dataset component and click '**Refresh now**' as shown in the image below



3. To rollout the changes to the users who you have shared the report to, click '**Update App**' on the top right of the page



4. You will be greeted with a configuration screen where it will ask you to provide a name for the app that will be distributed to in the '**App name**' (1) field. In this case, our App name is defaulted to "JESI Reports". Since you have entered your Organisation's API Key in the settings, feel free to name it to your liking e.g. XYZ Company JESI Activities. After filling in a suitable app name, provide a description in the '**Description**' (2) field and upload an App logo (if needed) by clicking '**Upload**' (3)

JESI Reports

Setup Navigation Permissions

Build your app

App name * 1

JESI Reports

Description * 2

Gain an understanding of Team and User JESI utilisation. The Productivity Report includes Activity totals, Activities per Team and individual User Activities.

42 characters left

Support site

https://jesi.io/contact/

App logo

Upload 3

Delete

App theme color

Blue

Contact Information

Show app publisher

Show item contents from the publisher

Update app Cancel

5. Navigate to the Permissions tab, here you can specify who has access and what level of access. Specify the individuals or groups that you would like to share the App in **Specific individuals or group (1)** field

Note: Recommended permissions may vary per organisation. Refer to your internal policies in regard to sharing Power BI Apps and Reports.

Once, finished click the yellow **'Update'** button at the bottom right (2)

JESI Reports

Setup Navigation **Permissions**

Access

☐ Entire organization

☒ Specific individuals or group

Enter email address

Users and groups with access to this workspace can access this app.

Allow everyone who has app access to

☐ Allow all users to connect to the app's underlying datasets using the Build permission.

☐ Allow users to make a copy of the reports in this app.

☒ Allow users to share the app and the app's underlying datasets using the share permission.

[Learn more about how to publish and update Power BI apps](#)

Installation

☐ Install this app automatically.

> Links

Update app Cancel

6. You will then be prompted that the update time directly correlates to the size of its distribution. The more users the application has been shared with, the longer it will take to update. To start the update process will click **'Update'**

JESI Reports

When you update an app that has large distribution, it might take a little while to process. Typically, the latest content will be available within 5-10 minutes, but it can take up to one day.

Update Cancel

Once the app is successfully updated, the below screen will show. Copy the link by clicking the yellow

‘Copy’ button and share it with the relevant users within the organisation

✔ **Successfully published**



JESI Reports

Give people the link below, or direct them to Apps > Get apps in the Power BI service.

<https://app.powerbi.com/Redirect?action=OpenApp&appId=7eb8d8!>

Copy

Go to app

Close

13.3. IVMS Integration

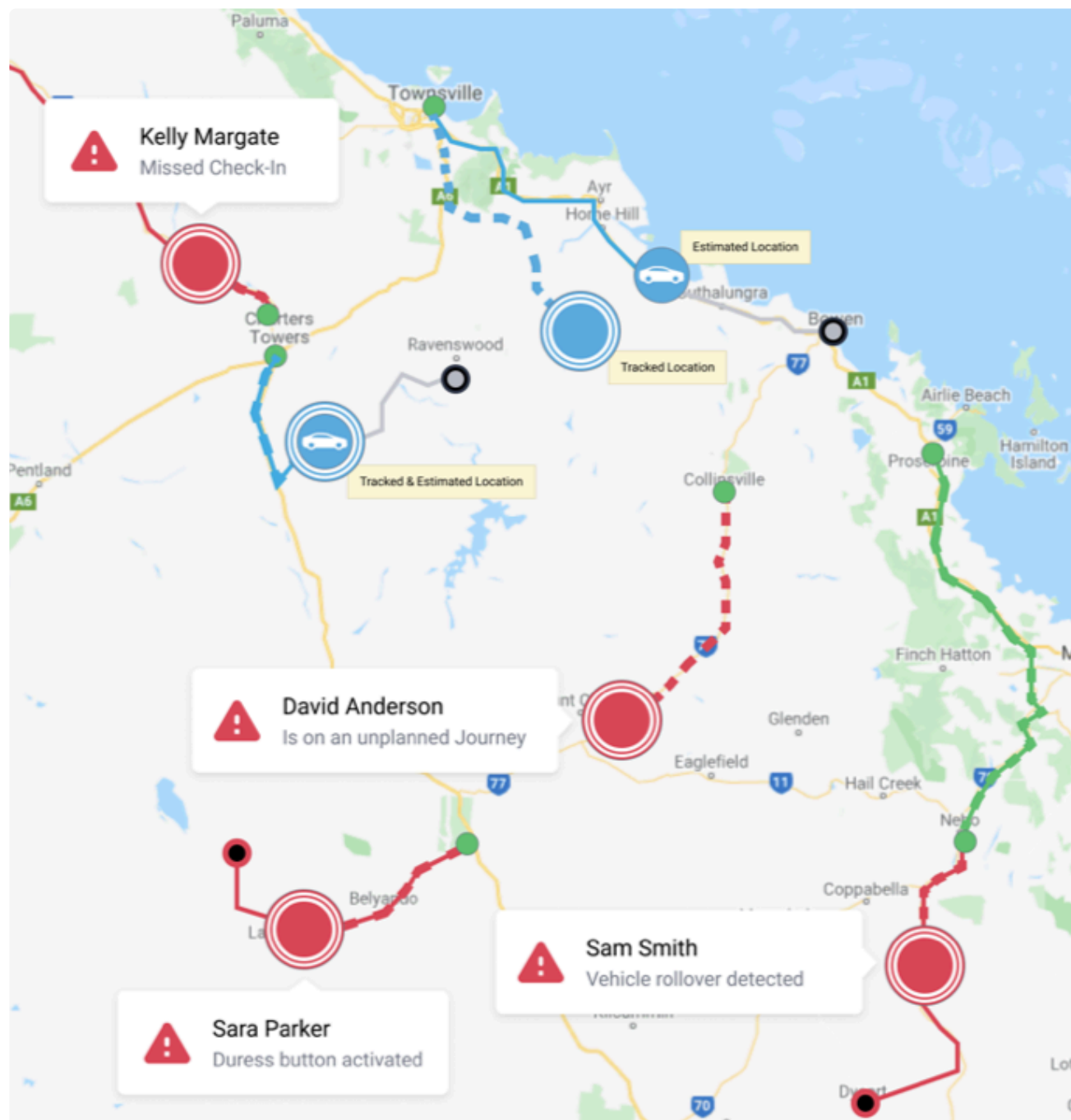
The JESI and IVMS integration brings Journey Management, Vehicle Tracking and all Remote Workers together in a centralised dashboard, enabling complete visibility over an entire workforce

Using real-time alerts and rapid communication for critical events impacting remote worker safety

Easily identify vehicle real-time and last known location, registration number, actual distance travelled and quick access link in the IVMS administration portal

How the JESI and IVMS integration works

1. Enter Journey in JESI and complete risk assessment
2. When FOB is activated the vehicle will automatically register with JESI
3. Vehicle arrives at the checkpoint, the vehicle stops and the Journey is automatically checked-in using the coordinates from the IVMS
4. Once you arrive at your checkpoint, check-in



To find out more, contact support@jesi.io

Integration partners:

GEOTAB
management by measurement

 **FleetComplete®**

mX
TELEMATICS

13.3.1. GEOTAB

13.4. Single Sign-On

Single Sign-On

Single sign-on (SSO) in enterprise refers to the ability for employees to log in just one time with one set of credentials to get access to all corporate applications, websites, and data for which they have permission. SSO solves key problems for the business by providing: Greater security and compliance

SAML 2.0 Compliant Identity Provider Configuration

Security Assertion Markup Language (SAML) is an open standard to securely exchange authentication and authorization data between an enterprise Identity Provider and JESI (the Service Provider)

SAML 2.0 Sign-On Experience

JESI currently supports the Identity Provider Login experience

Identity Provider Initiated Login Experience

With the Identity Provider initiated login experience, users directly access the enterprise's login manager and sign in to confirm their identity. The enterprise's Identity Provider sends the SAML2 response directly to the JESI platform. The user is logged in and redirected to the JESI application where they can access resources without requiring further authentication

SAML responses will be matched to pre-configured JESI accounts by an email address attribute assertion. JESI accounts will only be matched if they reside within the context of the configured Identity Provider

Service Provider Initiated Login Experience

Note: Service Provider (SP) initiated enterprise logins are expected to be supported in the future. The experience will differ from Identity Provider Initiated

Single Logout (SLO) Experience

JESI supports the SAML2 Identity Provider initiated Single Logout flow to terminate active user session(s)

Note: Logging out of JESI will terminate the user's current session and will require re-authentication for access. JESI does NOT support Service Provider initiated SLO

Joining the Organisation Automatically

JESI currently requires user accounts to be created and activated within the JESI platform prior to access being granted via an enterprise Identity Provider

Note: Just in Time (automatic) provisioning of JESI accounts will be supported in the future. Currently, users must have an account set up prior to using SSO (at this stage, the simplest way to do this is to import users)

Configure your JESI access with a SAML Identity Provider

JESI Service Provider Configuration

For configuration within an identity provider, the following settings should be used

Setting	Description	Value
Entity ID	JESI Service Provider Entity ID	https://api.jesi.io/
Metadata URL	XML document containing information necessary for interaction with SAML-enabled identity providers. The document contains e.g. URLs of endpoints, information about supported bindings, identifiers and public keys.	https://apiv2.jesi.io/sso/saml2/metadata
Reply/ACS URL	The reply URL will be the destination in the SAML response for IDP-initiated SSO.	https://apiv2.jesi.io/sso/saml2/acs HTTP-POST
Logout URL	URL to send the SAML Logout response back to the application.	https://apiv2.jesi.io/sso/saml2/logout HTTP-POST
Login URL	URL contains the sign-in page for this application that will perform the service provider-initiated single sign-on.	Not currently available
Authn Requests Signed	Service Provider requests will be signed	true
Want Assertions Signed	Identity Provider Assertion responses will be signed	true
Encrypted Assertions	JESI supports encrypted SAML2 assertion responses. The Identity Provider can optionally encrypt the assertion portion of the SAML2 responses. All SAML2 traffic to and from the JESI platform is already encrypted using HTTPS, but this adds another layer of security.	optional

Identity Provider Configuration Required by JESI

For configuration within JESI, the following settings need to be provided.

Setting	Description	Optionality
Entity ID	This will be the audience of the SAML response for IDP-initiated SSO.	Required
X509 Certificate	BCertificate, encoded in the BASE 64 format, for the enterprise Identity Provider. This is the certificate that allows JESI to verify the digital signature in the SAML responses sent to it from the enterprise Identity Provider.	Required
Login URL (Redirect)	Identity Provider's Login URL (that supports HTTP Redirect binding) that JESI should use to allow a member to sign in. Used in the future to enable Service	Optional

	Provider Initiated Login	
Login URL (HTTP-POST)	BIdentity Provider's Login URL (that supports HTTP POST binding) that JESI should use to allow a member to sign in. Used in the future to enable Service Provider Initiated Login	Optional

Contact the administrator of the Identity Provider if you need help determining which source of metadata information you need to provide.

User Attributes and Claims

JESI requires the following attribute information to be received from the Identity Provider when a user signs in.

Claim Name	Description	Optionality
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/nameidentifier	Unique User Identifier. Persisted to support Identity Provider logout requests.	Required
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress	User's Email address. Used to match to an enabled JESI account.	Required
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname	User's Given Name. Will be used in the future for Just in Time provisioning.	Required
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname	User's Surname. Will be used in the future for Just in Time provisioning.	Required
http://jesi.io/sso/saml/2021/01/identity/claims/title	User's Position Title. Will be used in the future for Just in Time provisioning. Missing values will be prompted for completion by the user prior to account provisioning.	Optional
http://jesi.io/sso/saml/2021/01/identity/claims/mobilenumber	User's Position Title. Will be used in the future for Just in Time provisioning. Missing values will be prompted for completion by the user prior to account provisioning.	Optional

Note: The **mobilenumber** claim will be used in the future to enhance the just-in-time account provisioning.

14. Troubleshooting

If you or someone you know is having issues with the JESI application, here are some troubleshooting guides.

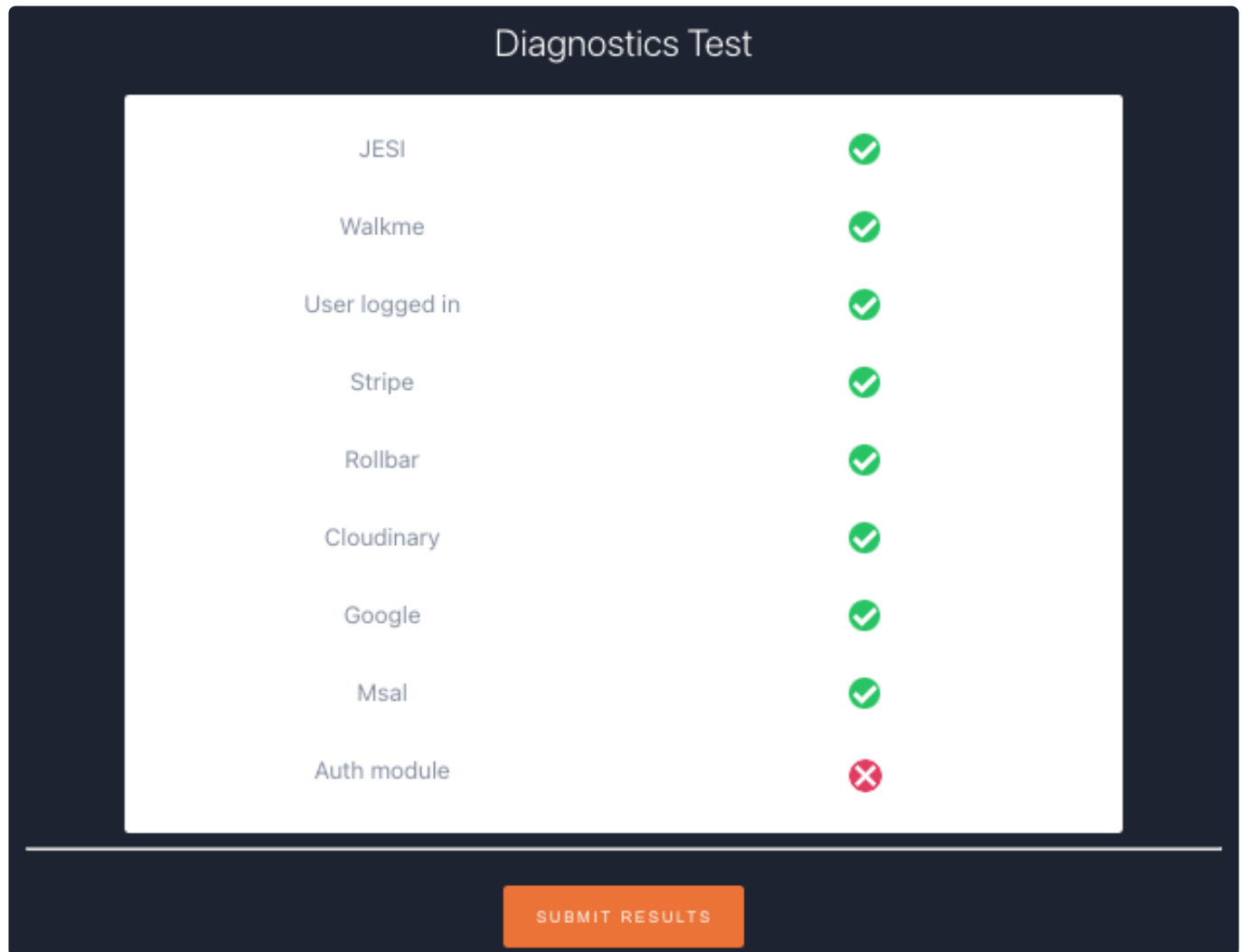
1. Troubleshooting Browser Connectivity
2. Clearing Google Chrome Cookies & Cache

14.1. Troubleshooting Browser Connectivity

If a User is experiencing connectivity issues and can not access JESI, or the browser is slow in loading the software, please follow the below steps to assist our technical support team diagnose the issue.

Open your browser and enter address <https://jesi.io/app/test.html>. Ensure you click SUBMIT.

[JESI Diagnostic Tool](#)



Diagnostics Test	
JESI	✓
Walkme	✓
User logged in	✓
Stripe	✓
Rollbar	✓
Cloudinary	✓
Google	✓
Msal	✓
Auth module	✗

SUBMIT RESULTS

Take a screen shot of the results and include them in the email to the JESI Customer Success support team customersuccess@jesims.com.au

14.2. Clearing Google Chrome Cookies and Cache

To clear Google Chrome's Cookies and Cache, please follow the guide below.

This guide is useful when you are getting errors with JESI, black screens when using JESI or JESI is not operating as expected.

GUIDE: [Clearing Google Chrome Cookies and Cache](#)

15. FAQ

Here are a few questions that we are often asked. [CLICK HERE](#)

15.1. One-Time Secret

Why do we use One-Time Secret?

We use One-time secret as a secure way to share passwords with you via email or chat. This allows us to send sensitive information in a safe way knowing it's seen by one person only.

Can I retrieve a secret that has already been shared?

Nope. We display it once and then delete it. After that, it's gone forever.

How long do we keep non-viewed secrets?

We keep secrets for up to 3 days. After that, they are deleted automatically and gone forever. (Note: by the time you read a secret, we display it once and then delete the one-time secret link.) If your secret has expired from the time we have sent you the email containing your secret link, please let us know at support@jesi.io and we will generate you a new one-time secret link.

16. JESI Training Centre



WELCOME TO THE JESI TRAINING CENTRE

From here you can access interactive guides, resources and videos that will help you get and up and running with JESI

Link: [JESI Training Guide](#)

The Training Centre consists of the following guides:

- Adding JESI to your Mobile Home Screen
- Creating a Journey
- Creating a Journey Using an Airline Travel Itinerary
- Creating a Working From Home Activity
- Creating a Working On-Site Activity
- Creating a Lone Worker Activity
- Checking-In with JESI
- Adding an Activity as a Favourite