

Here's How to Set Up *Roles* in Safety Meeting Pro

OVERVIEW:

Use *Roles* to assign similar permissions to groups of users in Safety Meeting Pro. Safety Meeting Pro is set up with default *Roles* that you can adjust. It's easy to create new *Roles*, too. Each *Role* should reflect the permissions of a group of workers in your company. Each *Employee* can only be assigned one *Role*. Set up *Roles* to only allow access to information needed for their job.

Quick Links:

- [How Do I Create, Edit, or Delete a Role?](#)
- [Granting Access to the Menus/Privileges](#)
- [Assigning Roles to a User](#)

IMPORTANT:

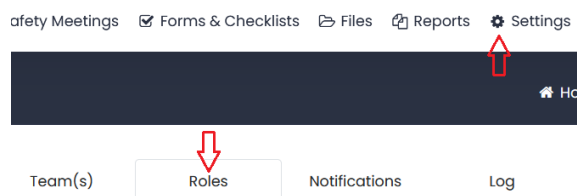
Roles can only be accessed via the website and are not available via the app.

IMPORTANT:

You must be logged in to the website as the account administrator to modify, delete, or add new *Roles*.

How Do I Create, Edit, or Delete a Role?

You must be logged in as the *account administrator*. Select the *Settings* menu item and then the *Roles* tab.



A list of default *Roles* that come with Safety Meeting Pro will be displayed.



My Details Company Settings Topics Additional Settings Team(s) **Roles** Notifications Log

[Add Role +](#)

Select Status Search:

#	Role Name	Role Note	Status	Added on	Action
1	Admin/Main	Access Everything!	Active	02/10/2022	
2	Admin		Active	02/10/2022	
3	Office Support		Active	02/10/2022	
4	Supervisor		Active	02/10/2022	
5	Field Tech		Active	02/10/2022	
6	Student	This role has only access to Safety Meetings which either be created by them or be of it.	Active	02/10/2022	

Showing 1 to 6 of 6 entries [Previous](#) [1](#) [Next](#)

- Select  to edit a *Role*.
- Select [Add Role +](#) button to create a new *Role*.
- Select  icon to delete a *Role*.

Granting Access to the Menus/Privileges

If a user was granted all privileges, they would see the following menus at the top of the Safety Meeting Pro app:

Dashboard Directory Incidents Employee Write Up's Safety Meetings Forms & Checklists Files Reports Settings

Each menu item (Dashboard, Directory, Incidents, Employee Write Ups, Safety Meetings, Forms & Checklists, Files, and Reports) corresponds to an entry found on the *Edit Roles* webpage starting with *Dashboard*. These entries are found without any leading dashes (--).

IMPORTANT:

"Full Access - Own Data" is not available for many menu items.

Incidents	<input type="radio"/> No Access	<input checked="" type="radio"/> Full Access - All Data	<input type="radio"/> Full Access - Own Data	<input type="radio"/> Read Only	
Employee Write Ups	<input type="radio"/> No Access	<input checked="" type="radio"/> Full Access - All Data	<input type="radio"/> Full Access - Own Data	<input type="radio"/> Read Only	
Safety Meetings	<input type="radio"/> No Access	<input checked="" type="radio"/> Full Access - All Data	<input type="radio"/> Full Access - Own Data	<input type="radio"/> Read Only	<input type="radio"/> Student

For example, to turn on the *Safety Meetings* menu item, it is important to grant *Full Access - All Data* under that setting. So below, *Incidents* and *Employee Write Ups* menus have been turned off while access to the *Safety Meetings* menu has been turned on.

Incidents	<input checked="" type="radio"/> No Access	<input type="radio"/> Full Access - All Data	<input type="radio"/> Full Access - Own Data	<input type="radio"/> Read Only	
Employee Write Ups	<input checked="" type="radio"/> No Access	<input type="radio"/> Full Access - All Data	<input type="radio"/> Full Access - Own Data	<input type="radio"/> Read Only	
Safety Meetings	<input type="radio"/> No Access	<input checked="" type="radio"/> Full Access - All Data	<input type="radio"/> Full Access - Own Data	<input type="radio"/> Read Only	<input type="radio"/> Student

This is what a user with that *Role* will see when they log in:

 [Dashboard](#)  [Safety Meetings](#)

Under the *Safety Meetings* menu, it is possible to control the level of access each *Role* will be granted for *Safety Meeting* features. There are several features associated with *Safety Meetings*, including creating individual meetings and creating group meetings. If your company has the *Advanced* or *Unlimited* plan, it is also possible to set permissions to allow users to schedule future meetings or create their own safety meetings. All of these lower level items begin with a --. Please select those privileges that you would like to grant to the role.

Safety Meetings

No Access Full Access - All Data Full Access - Own Data Read Only Student

--Safety Meetings (Can create individual Meetings)

No Access Full Access - All Data Full Access - Own Data Read Only

--Safety Meetings (Can create Group meetings)

No Yes Full Access - Own Data Read Only

--Scheduled Future Meeting

No Access Full Access - All Data Full Access - Own Data Read Only

--Safety Topics (Custom)

No Access Full Access - All Data Full Access - Own Data Read Only

At the top of the *Roles* webpage, you'll find the list of widgets that can appear on your dashboard. This is the home screen of the app. If your user needs "sign access" to the Safety Meetings, we recommend that you assign them a *Role* that has access to these two widgets. To grant this access select the following:

- *Widget: Safety Meetings* and click on *Full Access - All Data*
- *Widget: My Safety Meetings* and click on *Full Access - All Data*

Dashboard

-- Widget: Safety Meetings

No Access Full Access - All Data Full Access - Own Data Read Only

-- Widget: My Safety Meetings

No Access Full Access - All Data Full Access - Own Data Read Only

This action will turn on the widgets on the dashboard for all users assigned this role.

Dashboard Safety Meetings

Snow Day today! Drive carefully.

Next Scheduled Meeting: Not Scheduled
 Last Attended Safety Meeting: 12/29/2021

Daily Safety Tip: Report a hazardous condition immediately to your manager or supervisor.

Safety Meetings

Date	Topic	Leader	Type
02/04/2022	A new meeting	Suz Potter	Individual
02/03/2022	Accident Review: Electrocution On Pad-mounted Transformer	Tom Powers	Group
01/18/2022	Accidents Before And After	Tom Powers	Group

My Safety Meetings

Date	Topic	Leader	Type
12/29/2021	A Flood Of Danger	Suzanne Preuss	Group
12/29/2021	Ammonia Safety	Suzanne Preuss	Group
11/23/2021	Flying Objects	Tom Powers	Group


Click To Add/Remove Dashboard Widget

Assigning Roles to a User

1. Adding Employees via the website:

To get the most from your Safety Meeting Pro account, you need to add your workers as *Employees*. Using Safety Meeting Pro, select the *Directory* menu item and then select the *Employees* submenu.


Dashboard **Directory** Incidents Emplo

ers Constructio Employees 

Contractors

Next click on *Add Employee*.


Home > Employees



Add Employee

Now you can enter your employee's basic data.

← → ↻ 🏠 🔒 https://www.safetymeetingpro.net/employees.php

 Add Employee

First Name * Last Name *

Email Title

Phone Cell

Emergency Contact

Name	Phone	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>

To grant sign access—so a worker can sign from their own phone, tablet, or computer— click on '**All App & Panel Access**'. Then set their *Username* (often an email address) and *Password*. Finally, select the *Role* that is appropriate for the employee, perhaps *Supervisor* or *Laborer*.

Allow App & Panel Access?



Username * Password

Role