

How do I set up Safety Meeting Pro to hold a Safety Meeting?

Before you do anything else, decide how you want to hold Safety Meetings:

1. **Presenter Model:** A leader holds safety meetings in person with a crew and collects all signatures on one device.
2. **Crew Member Model:** Crew members hold—and sign—safety meetings on their own device.

IMPORTANT: The initial setup is best done via the website on a computer.

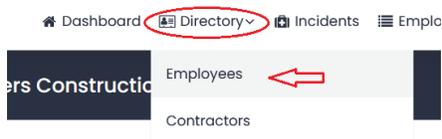
Presenter Model

Follow these directions to set up Safety Meeting Pro for a presenter who will hold safety meetings in person with a crew and collect signatures on one device:

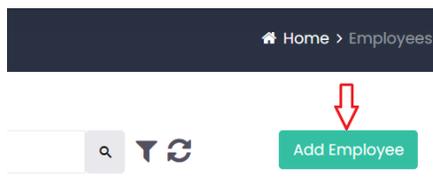
Adding Employees to the Safety Meeting Pro Directory

1. Adding Employees via the website (preferred):

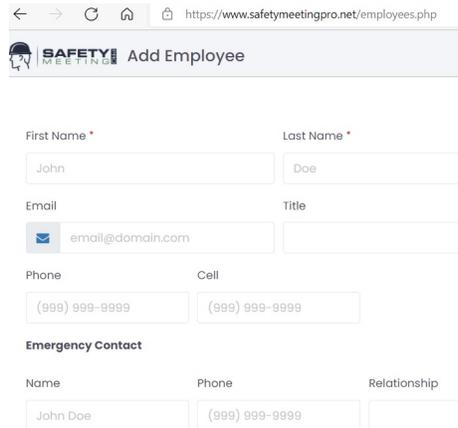
To get the most from your Safety Meeting Pro account, you need to add your workers as *Employees*. Using Safety Meeting Pro, select the *Directory* menu item followed by the *Employees* submenu.



Next select *Add Employee*.



Now you can enter your employee's basic data.



If this person is a **Crew Member** who will be trained by a Presenter and sign a Presenter's device, select the *Save & Close* in the bottom right hand corner. You're finished entering information for this employee, unless you want to make this employee a Presenter.

IMPORTANT: To make an employee a Presenter, log on to the website. This step cannot be done via the app.

If this person is a **Presenter** — and you want them to be able to have sign access from their 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*. Now select the *Save & Close* in the bottom right hand corner. You're finished entering information for this employee.

Allow App & Panel Access?



Username * Password

employee@domain.com ●●●●●●●●

Role

Laborer ▼ Dashboard (Full Access ▲

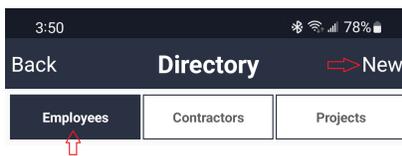
2. Adding Employees on a mobile device:

IMPORTANT: While you may enter and edit *Employees* on a mobile device, it is not possible to grant them access to sign Safety Meetings on their device. To grant this functionality, you must log on to the website.

To add your workers as *Employees*, using the Safety Meeting Pro app, select the *Directory* icon



Then select *Employees* near the top of the screen and finally *New*.



Now enter your employee's basic data.



IMPORTANT: To make an employee a Presenter — so they can have sign access from their phone, tablet, or computer— log on to the website via a computer. This step cannot be done via the app.

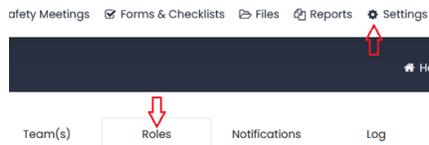
Defining Employee Roles in the Safety Meeting Pro Directory

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*.

Setting up Employee Roles via the website: (not available on app)

Safety Meeting Pro comes loaded with several preset *Roles*, which you can find by selecting the *Settings* menu item and then selecting the *Roles* tab.



You can adjust the privileges of each role to reflect different levels of workers in your company. Roles are assigned to a worker when you grant *All App & Panel Access* when entering an *Employee*. By default the *Supervisor* role has access to hold a meeting and to collect signatures. Please review all privileges assigned to the *Supervisor* role to make sure it is appropriate for the crew member assigned that role.

Creating a Safety Meeting for a Future Date

IMPORTANT: You'll need an *Advanced* or *Unlimited* plan, to schedule a Safety Meeting for a future date.

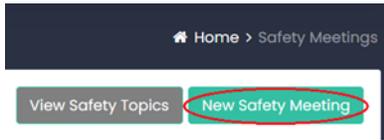
Once your Employee Directory has been created and you have assigned appropriate roles, you can schedule a Safety Meeting for your crew.

1. Creating a Safety Meeting via the website:

Select the *Safety Meetings* menu item.



Choose the *New Safety Meeting* button.



Select *Scheduled Future Meeting*.



Choose the *Group* option button.

Schedule Future Meeting

Group Individual

Leader(s) * ←

Topic *

Date *

When you select the *Leader* text box a new form appears:

Users My Team(s)

Search for Users

Press ENTER to Search for User

Chris B	
Christine, Senior Editor	
John Doe, Supervisor	✓
Larry, Safety Manager	✓

Save Cancel

Currently Selected

Please select contact from the left ...

<input checked="" type="checkbox"/>	John Doe, Su...	Employee
<input checked="" type="checkbox"/>	Larry Peck, Sa...	Employee

Select the Presenter who should hold the Safety Meeting and collect signatures on their device.

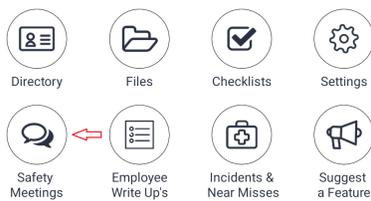
Select the *Save* button.

Finally, select the *Topic* and choose the *Date* and *Time*.

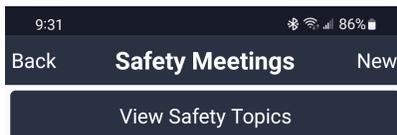
Select the *Save* button. The individuals that were selected under *Leader* will then be notified about the upcoming scheduled Safety Meeting.

2. Creating a Safety Meeting on a Mobile Device:

Select the *Safety Meetings* icon.



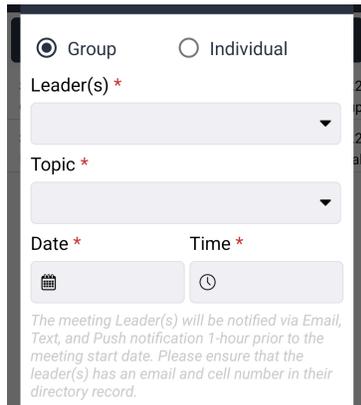
Choose the *New* button.



Select *Scheduled Future Meeting*.



Choose the *Group* option button.



Group Individual

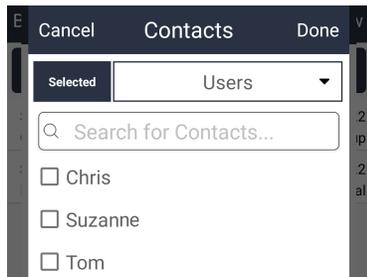
Leader(s) *

Topic *

Date * Time *

The meeting Leader(s) will be notified via Email, Text, and Push notification 1-hour prior to the meeting start date. Please ensure that the leader(s) has an email and cell number in their directory record.

When you select the *Leader* drop down box your list of *Employees* appear:



Cancel Contacts Done

Selected Users

Search for Contacts...

Chris

Suzanne

Tom

Select the Presenter who should hold the Safety Meeting and collect signatures on their device.

Select the *Done* button.

Finally, select the *Topic* and choose the *Date* and *Time*.

Select the *Save* button. The individuals that were selected under *Leader* drop down will then be notified about the scheduled Safety Meeting.

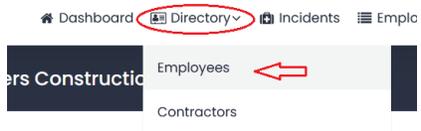
Crew Member Model

Here are the directions to set up Safety Meeting Pro so a member of a crew can hold and sign the Safety Meeting on their own device:

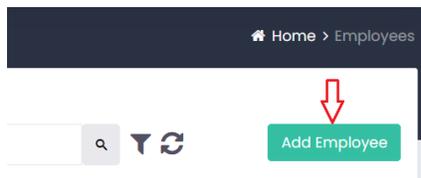
Adding Employees to the Safety Meeting Pro Directory

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 followed by the *Employees* submenu.



Next select *Add Employee*.



Now you can enter your employee's basic data.

Browser address bar: <https://www.safetymeetingpro.net/employees.php>

SAFETY MEETING PRO Add Employee

First Name * Last Name *

Email Title

Phone Cell

Emergency Contact

Name Phone Relationship

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*, *Laborer*, or create a new role called *Sign Access*. (Creating a new role requires an additional step, see instructions below.)

Allow App & Panel Access?



Username * Password

employee@domain.com ••••••••

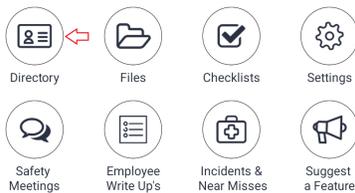
Role

Laborer Dashboard (Full Access ^

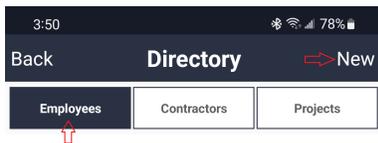
2. Adding employees on a Mobile Device:

IMPORTANT: It is possible to enter and edit *Employees* on a mobile device, but it is not possible to grant them access to sign Safety Meetings on their device. To grant this functionality, you must access your account via the website.

To add your workers as *Employees*, using the Safety Meeting Pro app, select the *Directory* icon.



Then select *Employees* near the top of the screen and finally *New*.



Now enter your employee's basic data.



IMPORTANT: To grant sign access—so a worker can sign from their phone, tablet, or computer—it will be necessary to set up their permissions via the website.

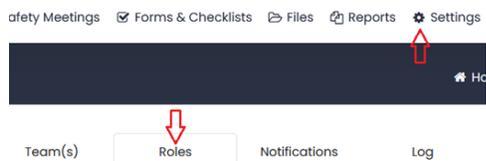
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1. Setting up Roles via the website: (not available on app)

Safety Meeting Pro comes loaded with several preset *Roles*, which you can find by selecting the *Settings* menu item and then selecting the *Roles* tab.



You can adjust the privileges of each role to reflect different levels of workers in your company. Roles are assigned when you grant *All App & Panel Access* to a worker. By default the *Supervisor* role has access to

hold a meeting and to collect signatures in addition to other privileges. Please review all privileges assigned to the *Supervisor* role to make sure it is appropriate for the workers assigned that role.

If you would like crew members who are not supervisors to be able to sign a meeting from their own phone, tablet, or computer, (vs signing their supervisor's phone) then simply adjust the settings for a *Laborer* role or you can create a new role called *Sign Access*.

To allow access to hold a meeting and collect signatures it is necessary to have the following privileges assigned to the role:

- *My Scheduled Meetings* and grant *Full Access – All Data*
- *Safety Meetings* and grant *Full Access - Own Data*

Creating a Safety Meeting for a Future Date

IMPORTANT: You'll need an *Advanced* or *Unlimited* plan, to schedule a Safety Meeting for a future date.

Once your Employee Directory has been created and you have assigned appropriate roles, you can schedule a Safety Meeting for your crew to sign on their own devices.

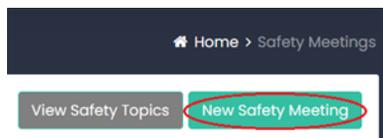
1. Creating a Safety Meeting via the website:

Select the *Safety Meetings* menu item.



Dashboard Directory Incidents Employee Write Ups **Safety Meetings** Forms & Checklists Files Reports Settings

Choose the *New Safety Meeting* button



Select *Scheduled Future Meeting*.



Choose the *Group* option button.

Schedule Future Meeting

Group Individual

Leader(s) * ←

Topic *

Date *

When you select the *Leader* text box a new form appears:

Users | My Team(s)

Search for Users

Press ENTER to Search for User

Chris B	
Christine, Senior Editor	
John Doe, Supervisor	✓
Larry, Safety Manager	✓

Save Cancel

Currently Selected

Please select contact from the left ...

<input checked="" type="checkbox"/>	John Doe, Su...	Employee
<input checked="" type="checkbox"/>	Larry Peck, Sa...	Employee

Select ALL the workers who should be trained on the safety talk. They will have access to the safety content and will be able to sign on their own device.

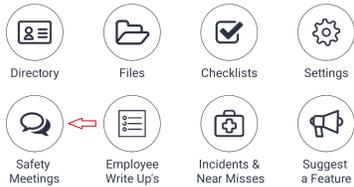
Select the *Save* button.

Finally, select the *Topic* and choose the *Date* and *Time*.

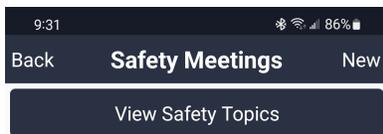
Select the *Save* button. The workers that were selected under *Leader* will then be notified about the scheduled Safety Meeting.

2. Creating a Safety Meeting on a Mobile Device:

Select the *Safety Meetings* icon.



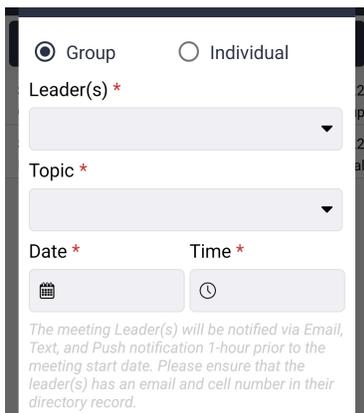
Choose the *New* button.



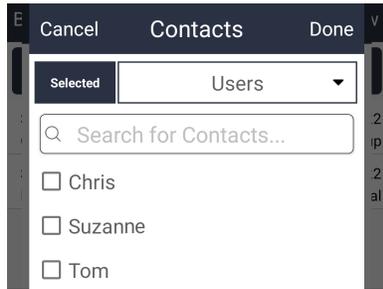
Select *Scheduled Future Meeting*.



Choose the *Group* option button.



When you select the *Leader* drop down box a list of workers appear:



Select ALL the workers who should be trained on the safety topic and collect their signatures on their own devices.

Select the *Done* button.

Finally, select the *Topic* and choose the *Date* and *Time*.

Select the *Save* button. The individuals that were selected under *Leader* drop down will then be notified about the scheduled Safety Meeting.