



# What's New and What's Next for SiteDocs

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A NEMETSCHEK COMPANY



# Agenda

01. SiteDocs Overview
02. What's New for SiteDocs
03. What's Next for SiteDocs
04. What should we do next?
05. Additional Breakout Sessions



# Product Overview



# 100,000,000+ Signatures to Date

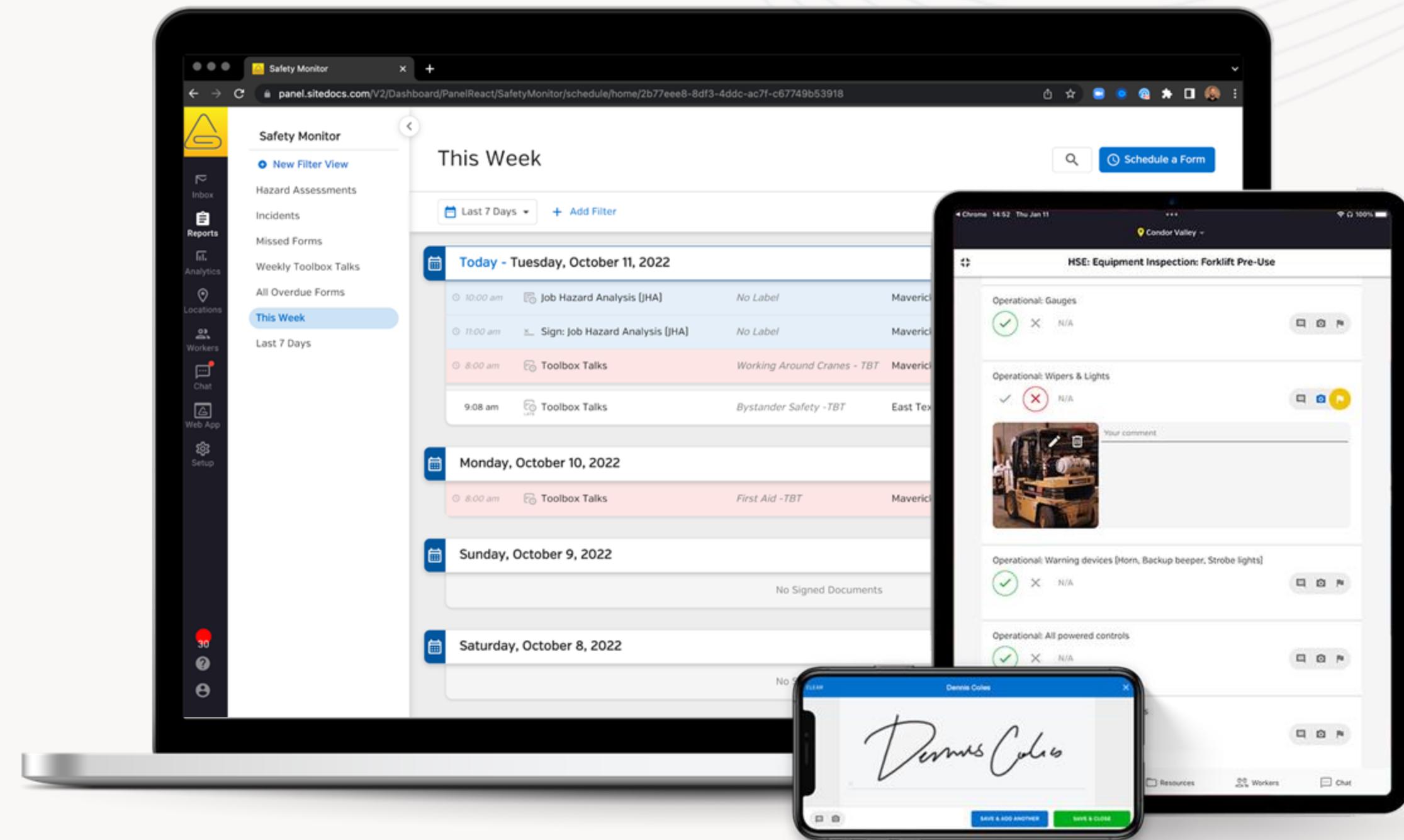
**6000+**  
Unique  
Companies

**1.3 Million +**  
Unique  
Workers

**58 Million +**  
Forms Signed  
& Saved

**3 Million +**  
Certifications  
Managed

# What does Safety Management look like for you today?



# Manage *On Site*, Monitor *In Office*

Go paperless, reduce your admin burden, and easily manage compliance across all your job sites. The ultimate in risk management sophistication, customization, automation, and integration.



Build &  
Customize



Digital  
Forms



Safety  
Resources



Scheduled Tasks



Real Time  
Monitoring



Hazard  
Management



Incident  
Management



Corrective  
Actions



Custom  
Analytics



Workflow  
Studio



Certification  
Management



Equipment  
Management



Contractor  
Management

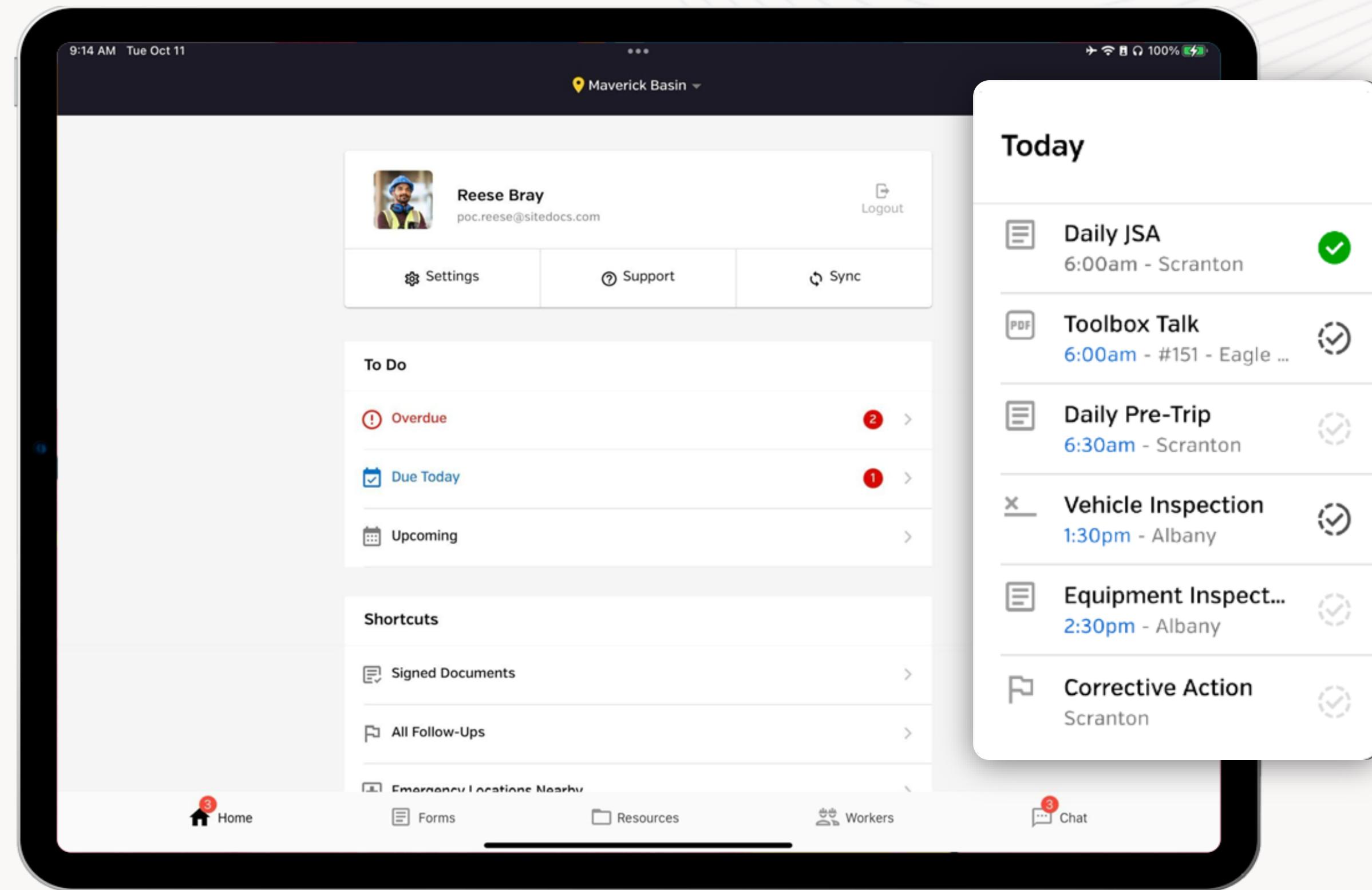


Access  
Control



Data Integrations  
SSO & Sharing

# Worker *Mobile App*



9:47 AM Tue Oct 11

📍 Maverick Basin

## Heavy Equipment Circle Check

### Operational Check

Backup Alarm, Camera and Mirrors

✓ ✗ N/A

Chassis

✓ ✗ N/A

 Stress Cracks noted on several welds. Right hand side.

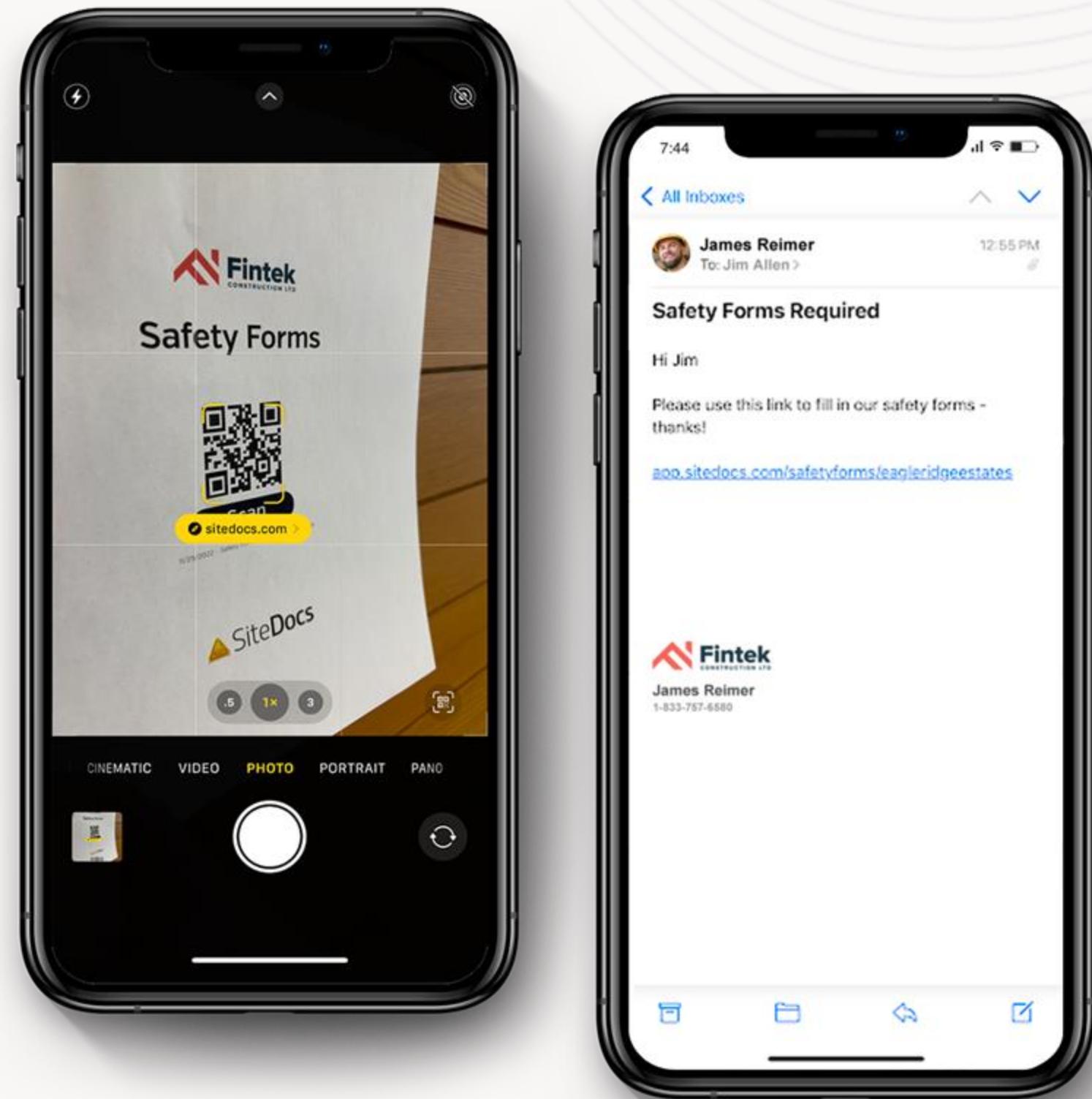
### Dump body, hinges and Gates

✓ ✗ N/A

Home 3 Forms Resources Workers Chat

This mobile application interface displays a heavy equipment inspection checklist. The main screen shows a navigation bar on the left with options like 'New', 'In Progress', 'Duplicate', 'Revision', and 'Previously Signed'. The main content area is titled 'Heavy Equipment Circle Check' and 'Operational Check', listing items such as 'Backup Alarm, Camera and Mirrors' with a status of '✓ ✗ N/A'. Below this is a section for 'Chassis' with a status of '✓ ✗ N/A'. A thumbnail image shows a worker inspecting the chassis, with a note indicating 'Stress Cracks noted on several welds. Right hand side.' The bottom navigation bar includes links for 'Home' (with a red notification badge showing '3'), 'Forms', 'Resources', 'Workers', and 'Chat'.

# Easy Path to *Compliance For Contractors*



Allow easy access to required Forms & Resources by a link or QR code.

The SiteDocs Lite App means no app download is needed.

**Site Specific Document Control**

Jul. 18 - 22 1 Location + Add Filter

Monday, July 22, 2024 1

Job Safety Analysis (JSA) Jul. 22  
No Label  
Barnett & Co - #1544 Scheduled

Today - Friday, July 19, 2024 3

Job Safety Analysis (JSA) 9:00 am  
No Label  
Barnett & Co - #1544 Overdue

Heavy Equipment Circle Check 9:55 am  
No Label  
Barnett & Co - #1544 1 Signature

Scaffold Inspection Checklist 9:02 am  
No Label  
Barnett & Co - #1544 1 Signature

Thursday, July 18, 2024 5

Field Audit Jul. 18  
Signature  
No Label  
Barnett & Co - #1544 Scheduled

Field Audit Jul. 18  
No Label  
Barnett & Co - #1544 Overdue

Site Inspection Jul. 18  
No Label  
Barnett & Co - #1544 1 Signature

Daily Briefings Jul. 18  
Circular Saw Do's & Don'ts - TBT  
Barnett & Co - #1544 2 Signatures

**SiteDocs**

**Fintek CONSTRUCTION LTD**

Fintek Co.  
123 Street Cr.,  
Eagle Estate, British Columbia  
123-456-7890

**Heavy Equipment Circle Check**

**Information**

[no label]

Barnett & Co - #1544

Friday, July 19th 2024, 8:55 AM (PDT -07:00)

**General Information**

Unit # CAT E-565

Engine Hours Meter Start: # 2644

**Fluid Management**

Check all fluids, contact your Supervisor immediately if any fuels other than engine oil or diesel are required.

Check Fuel Levels

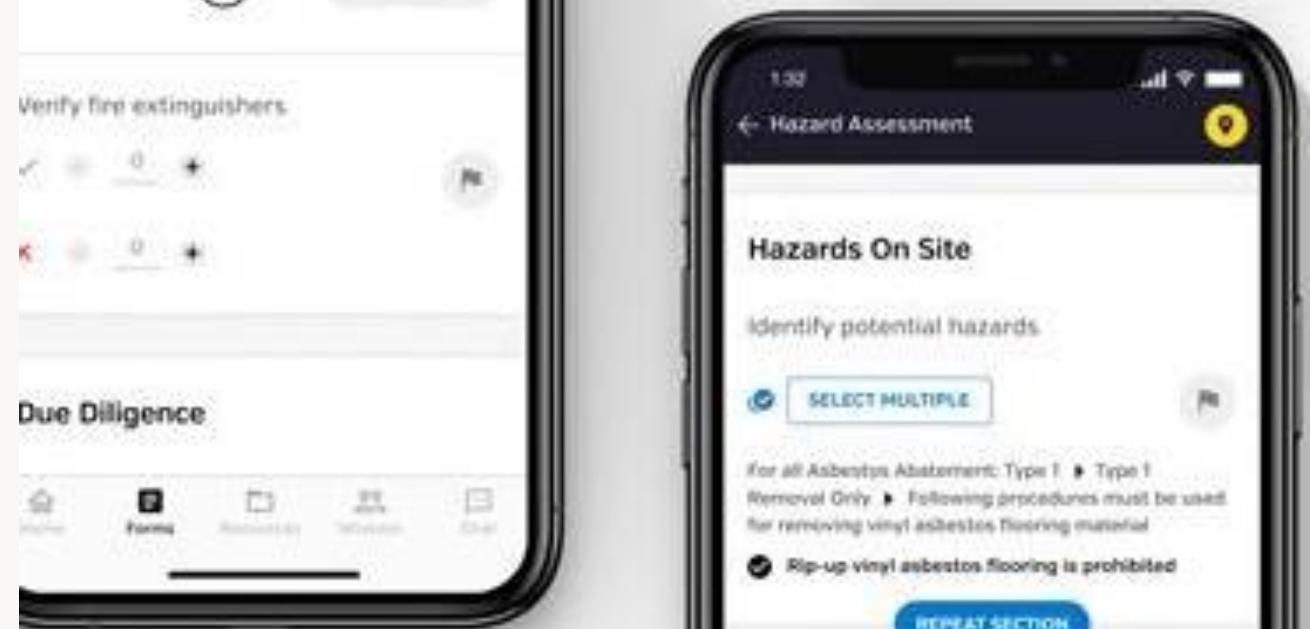
Check Engine Oil levels

Revise Add Signature



# What's New for SiteDocs

2025 Year to Date Releases



## What's New



# Incident Folders

- Case number, date, description
- Set status & view activity history
- Add additional files or upload a custom Incident summary
- Schedule forms and approval signatures against each Incident
- Organize Incidents by Type

Case Number	Locations	Usage Hours	Active
134-090008	11 locations	1,983 hours	Active
MGH-8625-PLI	7 locations	60 hours	Active
876-93473BT	2 locations	683 hours	Active
0090DB09UI	6 locations	267 hours	Active
76TPQW87NM22	0 locations	2,989 hours	Inactive
90LOUT22EN81	1 location	98 hours	Active
11BRTU00PB56	8 locations	4 hours	Active
00000783	246 locations	888 hours	Active
PB0090065	2 locations	56 hours	Active
QJKHJB89347BJLK	76 locations	904 hours	Active

## What's New



# Process Folders

Track multi-Form processes with custom statuses, attachments, and scheduled items, all organized in one place.

The screenshot shows the UNBOUND mobile application interface. On the left is a vertical navigation bar with icons for Monitor, Reports, Locations, Workers, Companies, Incidents, Processes (highlighted in yellow), Chat, and Setup. The main content area is titled '#11 - Permit to Work'. At the top right are buttons for '+ Attach PDF' and 'Schedule Form'. The process timeline shows the following events:

- June 2, 2024: Waiting for Final Approval (9:30 am) - Needs review and signature from Michael
- Signature added (8:13 am) - Darryl signed checklist
- Signature added (6:54 am) - Jim signed form
- June 1, 2024: Checklist Done (9:30 am) - Form checklist done
- May 31, 2024: Form Completed (8:11 am) - Pre-Trip done
- Started (8:10 am) - Dwight started filling out form

Below the timeline are three sections: 'Process Summary PDF' (Jun. 2, 2024 at 9:30 am, #11 - Permit to Work - [Summary #6]), 'Additional PDF Files' (Jun. 1, 2024 at 5:55 am, Work Order - Fintek; May 31, 2024 at 3:21 pm, Work Order - Smithson Roofing), and 'Process Forms' (Jun. 3, 2024 by 7:00 am, Hazard Assessment; Jun. 2, 2024 by 12:30 pm, Sign: Pre-Trip; Jun 2, 2024 at 8:13 am, Pre-Trip Checklist; May 31, 2024 at 8:13 am, Pre-Trip).

## What's New



# Approval Signatures

Request approval of your Forms and get notified if it's been approved or rejected.

The screenshot shows the UNBOUND mobile application interface. On the left, a sidebar menu includes 'Monitor' (selected), 'Analytics', 'Locations', 'Workers', 'Companies', 'Chat', 'Web App', and 'Setup'. The main content area is titled 'Pre-Shift Hazards' and shows a list of tasks for 'Today - Monday, November 4, 2024'. The tasks include:

- 10:30 am: Sign: Hazard Assessment (Pending Approval)
- 9:00 am: Toolbox Talk
- 9:36 am: Hazard Assessment (Approved)
- 9:12 am: Vehicle Inspection (Approved)
- 8:08 am: Hazard Assessment (Rejected)
- 7:54 am: SRC DVIR - Driver Vehicle In...
- 7:23 am: Toolbox Talk (Fall Protection)
- 6:11 am: Baler Inspection (New Baler)
- 6:01 am: SWMS (New Protocols)

Below this, sections for 'Sunday, November 3, 2024' and 'Saturday, November 2, 2024' are shown, both with 'No Signatures'.

On the right, a large smartphone screen displays the 'Permit to Work' section. It shows 'Additional Photos' and a large handwritten signature. Below the signature, the name 'James Reimer' and title 'Framer' are displayed. A timestamp 'Oct. 17, 2024 at 12:32 pm' and coordinates '52.048580, -128.371018' with a 'View Map' link are shown. At the bottom of the phone screen are 'Reject' and 'Approve' buttons, with 'Approve' being green and 'Reject' being red.

## What's New



# Receive PDF Forms by Email

Easily receive PDFs and have them automatically imported into your account under a Location and specific Form Template type for easy organizing.

Locations

#121 - Eagle Ridge Estates

Monitor

Locations

Details

Workers Assigned

Certifications on Site

Sending

Name

Add Auto-Share Rule

Add Receiving Email

Receive PDF by Email

Create a unique email address for this Location to share with external parties or other SiteDocs users.

Email Address

Associated Form Template

hazard15215214214BFewg@sitedocs.com

Copy Email

Hazards & Controls

workeror1t-151534214BFewg@sitedocs.com

Copy Email

Worker Orientation

hazard15215214214BFewg@sitedocs.com

Copy Email

Hazards & Controls

workeror1t-151534214BFewg@sitedocs.com

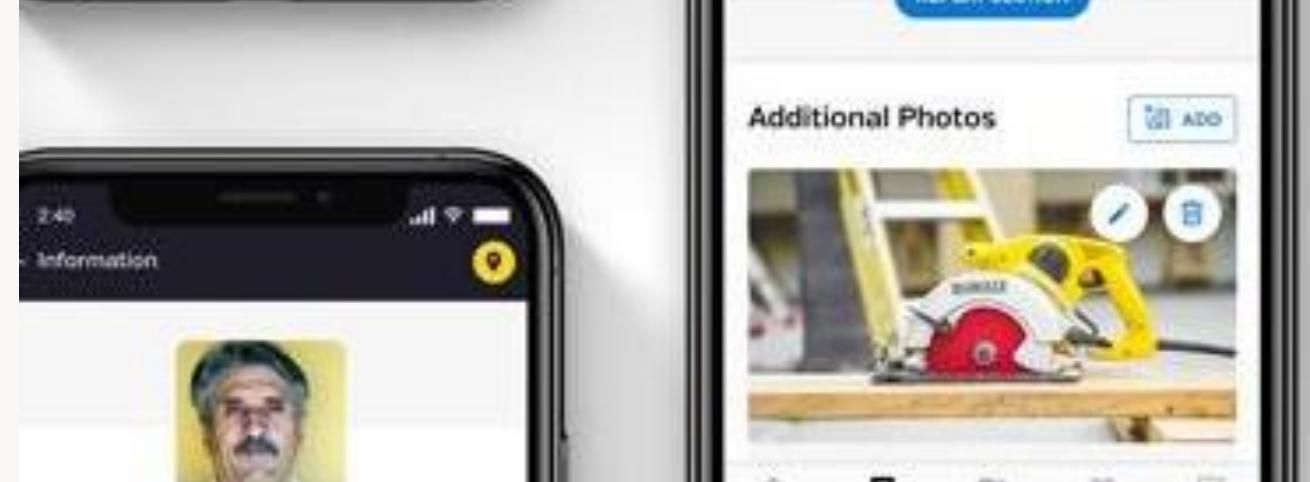
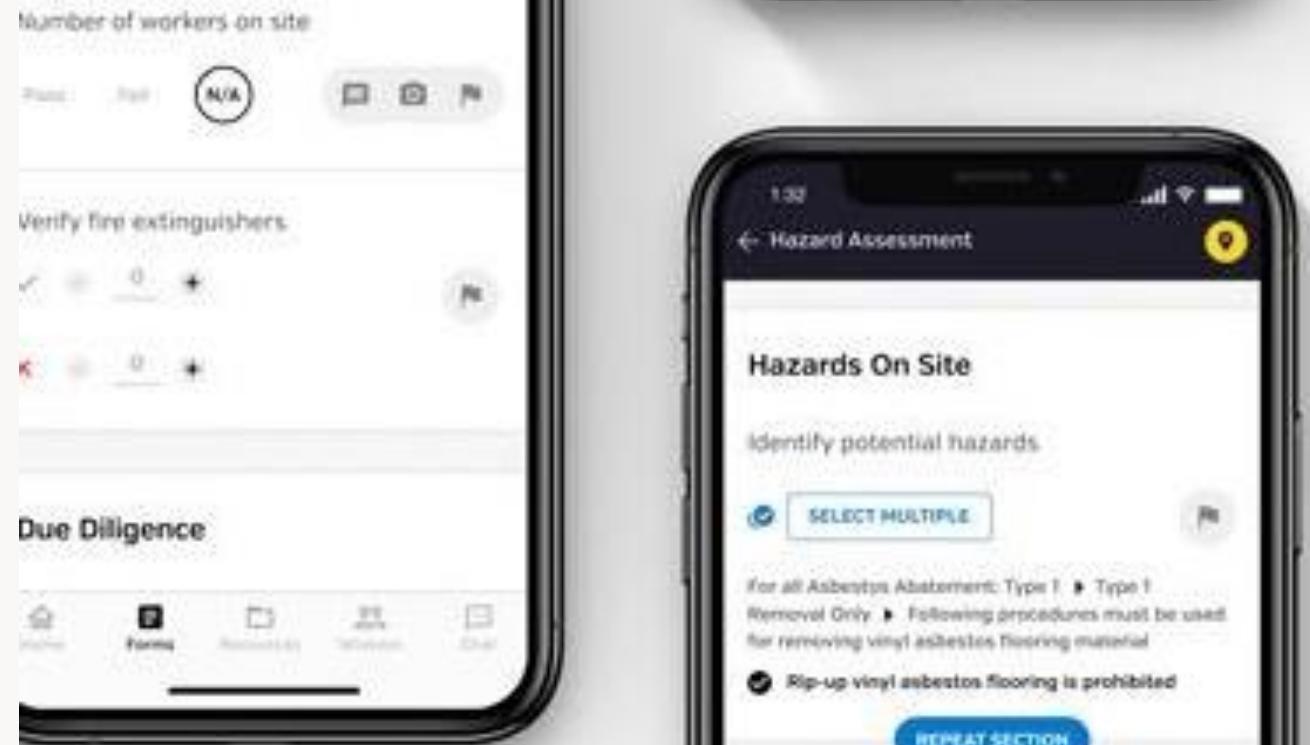
Copy Email

Worker Orientation



# What's Next for SiteDocs

*Priorities and designs are  
subject to change*



## What's New



# Print Layout Settings

- Select the Layout Orientation for your form's report; Portrait or Landscape.
- Show Repeated Sections as Table

Print Layout Settings

Layout Orientation

Portrait       Landscape

Show Repeated Sections as Table:

Details     

General Hazards     

Work Details     

Status     

Jun. 4, 2025 at 12:16 PM

SiteDocs

Hazards & Controls

Worker	Vehicle have enough coolant?	Windshield wiper fluid?	Explain the precautions you took.	Identify hazards
Pam Beesly	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/>	= Checked surroundings and cleared debris <a href="#">View Photo 1</a> <a href="#">View Photo 2</a>	<input checked="" type="checkbox"/> For all Asbestos Abatement + Type 1 Removal
	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/>	= Cleared debris <a href="#">View Photo 3</a>	<input checked="" type="checkbox"/> For all Asbestos Abatement + Type 2 Removal
	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/>	= No Response	<input checked="" type="checkbox"/> No Response

Controls Appendix

Photo 1

Photo 2

Revise   Add signature

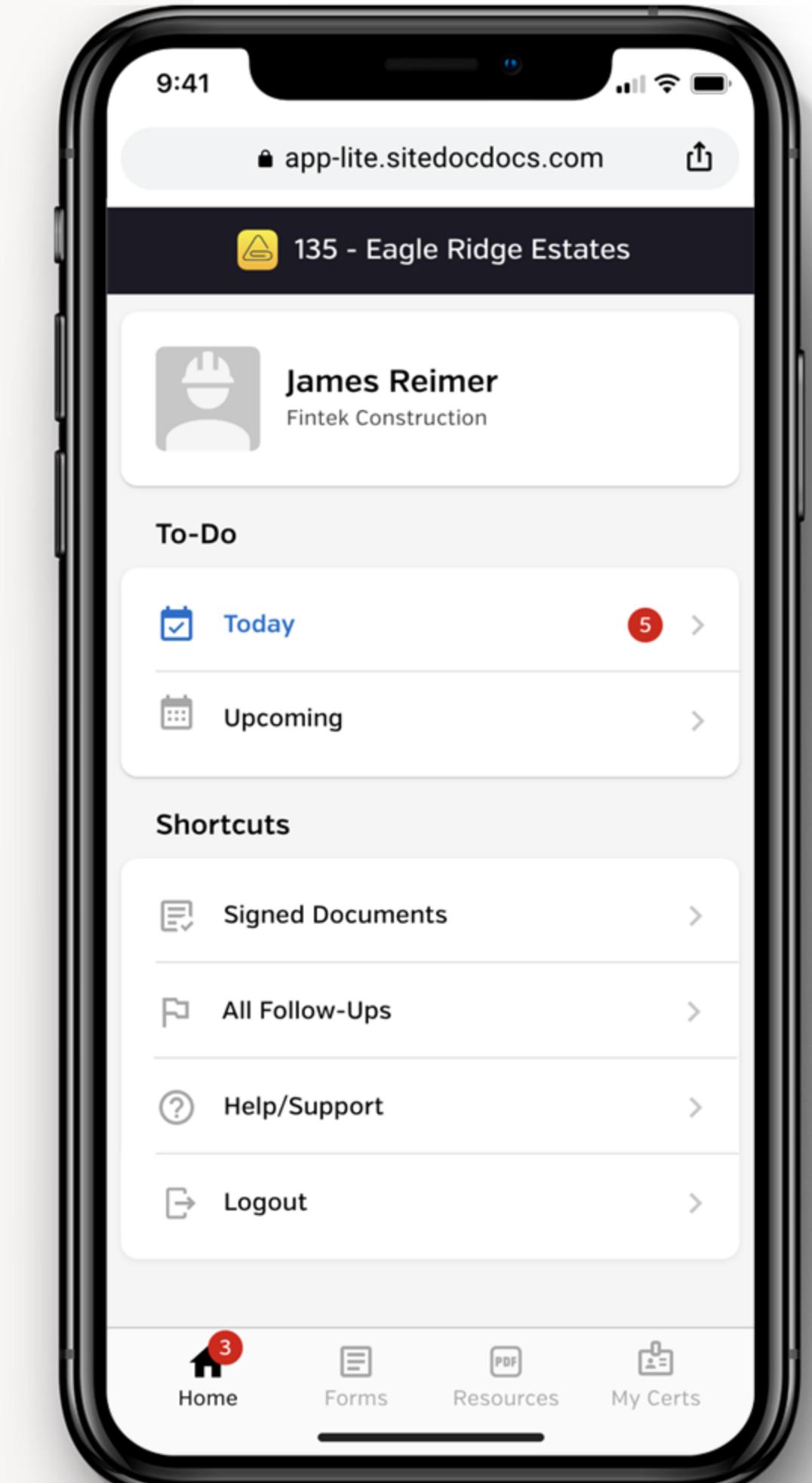
## What's Next



# Web App Lite Improvements

Bring existing Web App features to the Web App Lite for Contractor Workers:

- \*launched\* View, Revise, & Duplicate Completed Forms
- Schedule forms to Contractors
- To-Do Lists
- And more!



## What's Next



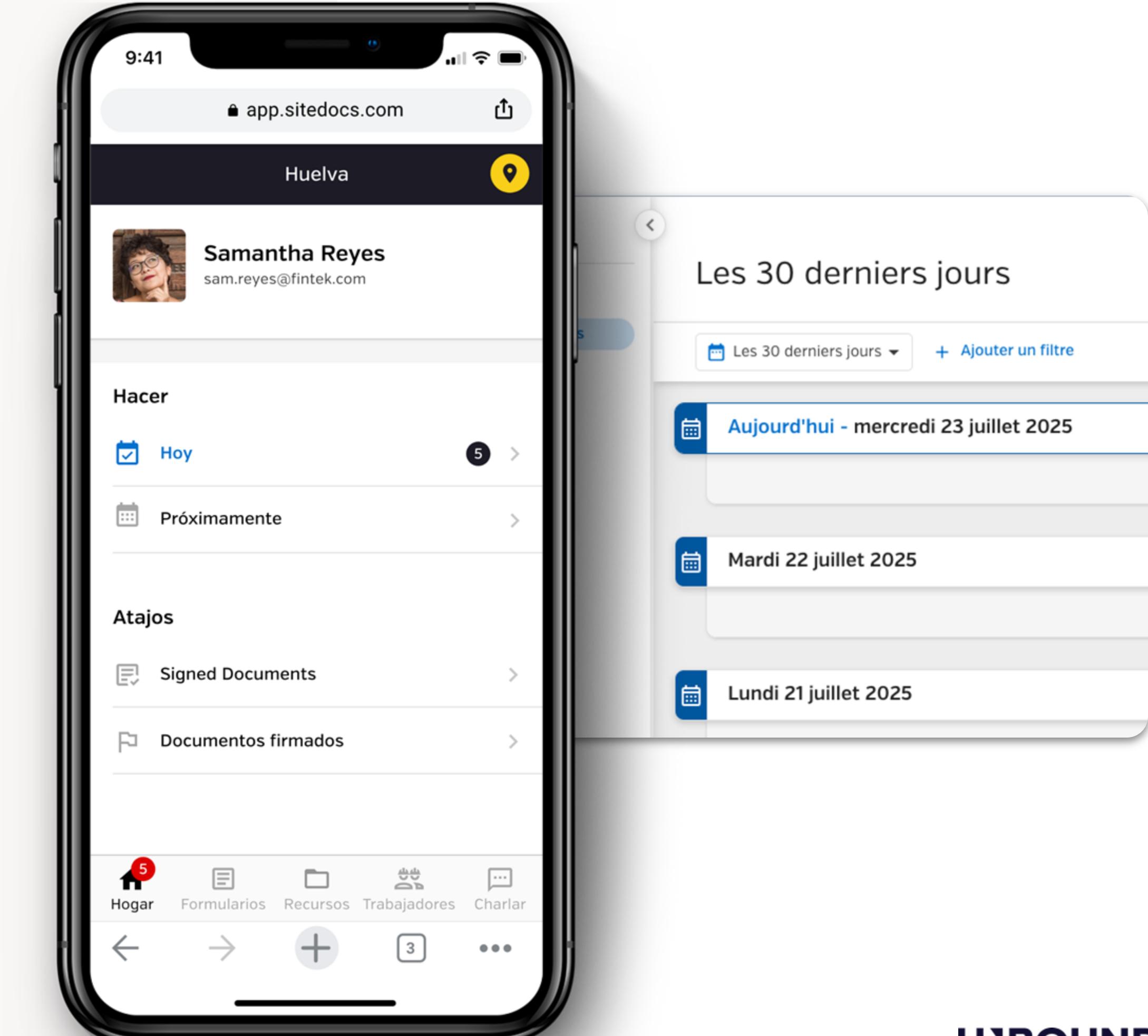
# Enhanced Regional Support

## Additional Language Support

We will be adding native support for French and Spanish in both the Web App and Admin panel.

## Regional Data Centers

We will be deploying a second SiteDocs data center so that customers can select whether they want to have their account setup in the US or in Canada.



## What's Next



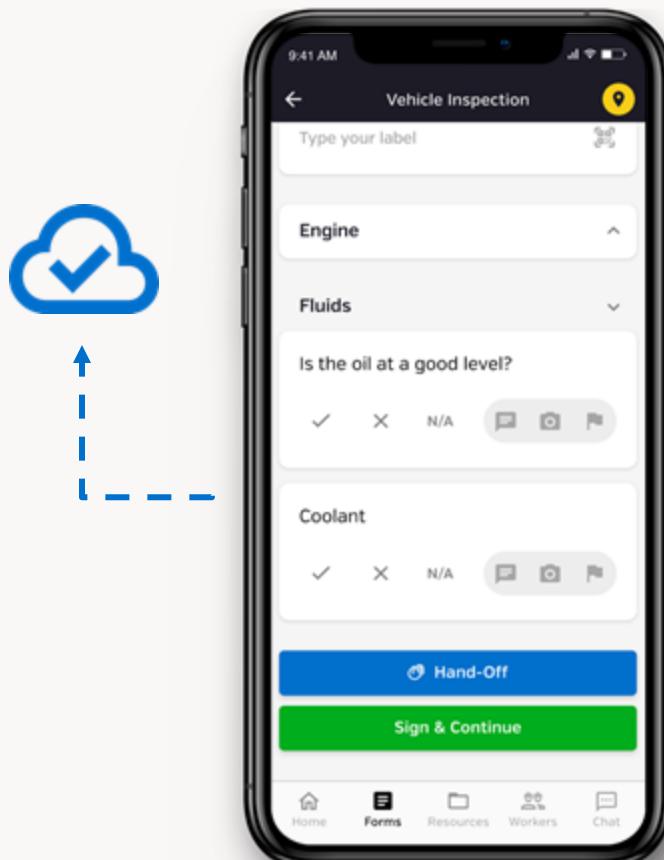
# Next-Gen Forms

- Drag & Drop Form Builder
- Conditional Logic
- Signatures Form Item
- Table Form Item
- Duplicate Form Template, Items, and Sections
- Drafts & Publish Button
- Form Template Versions
- and more

The screenshot displays the Next-Gen Forms builder interface. On the left, a sidebar lists various form item types: Sections, Item Modifications (with an 'Add Conditional Logic' button), Pass / Fail Checks (checkbox, Pass / Fail / NA, Yes / No / NA, Pass/Fail Count), Selections & Data Types (Select Workers, Select Equipment, Select From Custom List), Tables, Text & Numbers (Short Answer, Long Answer, Text Block, Number), and Files (Insert PDF, Add Photo, View PDF, View Images). The main area shows a form template titled 'Site Safety Review' with a 'PUBLISH' button. The form contains a 'Label' item and a 'General Info' section. The 'General Info' section contains a complex conditional logic structure. It starts with a condition 'If ANSWER is PASS then DON'T REQUIRE ACTION and show:'. This leads to a series of nested conditions: 'Y/N Steel on steel contact', 'Y/N Can soft steel hammer be used?', 'Y/N Can rubber mallet be used?', and 'Y/N Is this the only tool available?'. Each of these nested conditions has its own 'Add Condition' button. Below this, there is another condition 'Identify potential hazards' with a 'NO' branch that requires a comment and selects a witness. The interface uses a light blue and white color scheme with a dark sidebar.

# Also In Development:

## Form Handoffs



## Dedicated Hazard & Control Module

Built with SWMS & RAMS in mind

The screenshot shows a software interface for 'Hazards &amp; Controls'. On the left is a sidebar with icons for Index, Reports, Analytics, Locations, Workers, Shift, and Web App. The main area has a title 'Hazards &amp; Controls' and a table with columns: 'Y/N Activity', 'Y/N Activity Description', 'Y/N Hazard', 'Y/N Potential of Hazard', 'Y/N Potential Risk', and 'Probability'. The 'Activity' column lists 'Work at height' and 'Mechanical'. The 'Hazard' column lists 'Gravity' and 'Falling object'. The 'Potential of Hazard' column lists 'Fall from height' and 'Falling object'. The 'Potential Risk' column lists 'Major injury or fatality' and 'Minor/major injury'. The 'Probability' column lists '3' and '3'. A modal window titled 'Activity' is open, showing 'Input Type' as 'Y/N Yes / No' and 'Make Sub-Column' as 'A response to this item is required in order to complete the Form.' Below the table is a 'Risk Assessment Matrix' with 'Likelihood' on the y-axis (1 to 5) and 'Effect' on the x-axis (1 to 5). The matrix cells are color-coded: green for low risk, yellow for medium risk, and red for high risk.

## Custom PDF Layouts

A screenshot of a custom PDF layout for an insurance quote. The header reads 'JohnInsurance & Co' and 'Quote 2891'. The 'Insurance Home' section shows 'Insured' (Jean Michel, 23, Sycamore Street, New York, +33 2 38 99 18 23), 'Period: 2 years', and 'Start date: 07/28/2022'. The 'Personal Property' section lists items: Furniture (1200€), Appliances (400€), Clothing (300€), and Dishes (300€). The total is 2200€, with a 10% tax, resulting in a total of 2420€. A signature field is at the bottom with the text 'To accept this quotation, sign here: \_\_\_\_\_'.

# What do you want SiteDocs to do next?



## Product Improvements?

What additional polish/features will improve your SiteDocs experience?

## New Use Cases?

Where would you like to see SiteDocs invest to address additional problems for your business?

## Integrations?

How can we better play in your business's technology ecosystem?

# Recommended Breakout Sessions

## Hear from a Safety Expert

Thursday, October 2nd  
1:00pm to 2:00pm  
Terrace Level | Gunston East

**Hillary Rigg**  
Client Services Manager, Paragon Safety

## Master SiteDocs: Expert Tips and Tricks to Simplify Safety and Compliance

Thursday, October 2nd  
2:30pm to 3:30pm  
Terrace Level | Fairchild

**Braden Andres**  
Enterprise Sales Engineer, SiteDocs

# Thank You

Scan the QR Code to schedule a demo of SiteDocs

