UNBOUND

What's New and What's Next for SiteDocs

Corbett Kaniff
Sr. Product Manager

SiteDocs
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

SiteDocs

Product Overview

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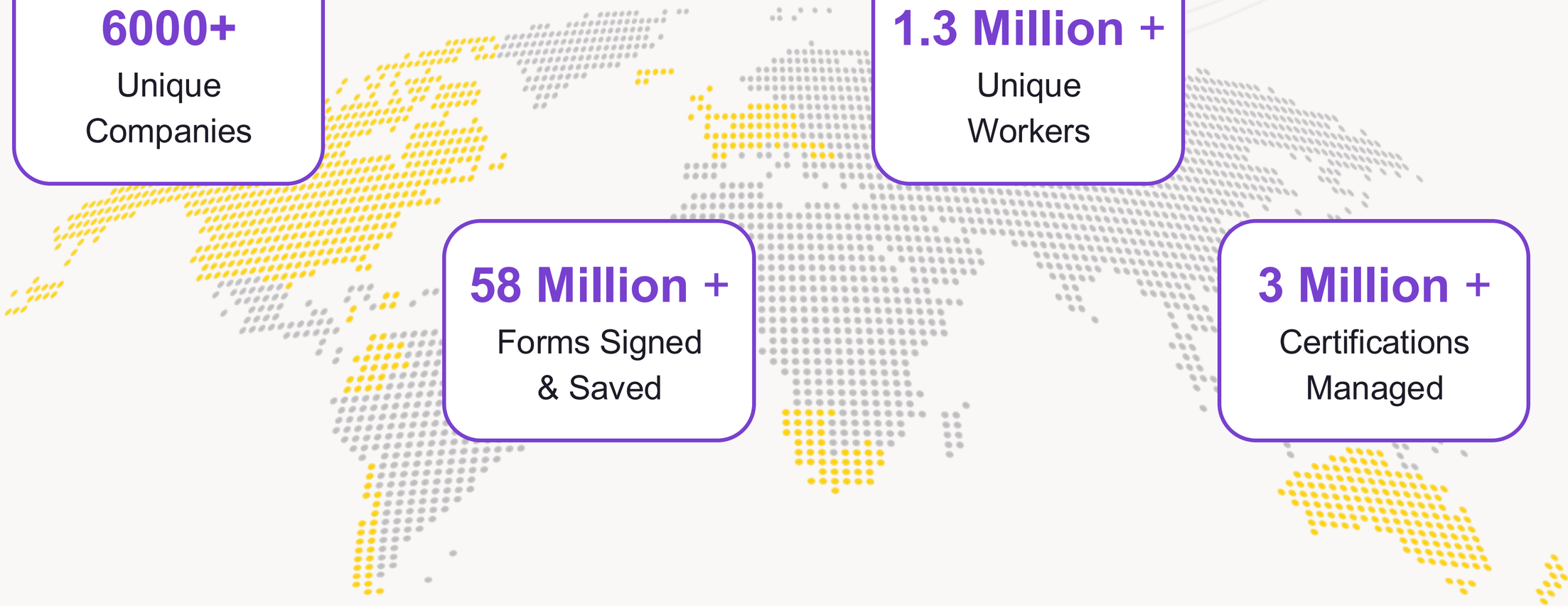
100,000,000+ Signatures to Date



6000+
Unique
Companies

1.3 Million +
Unique
Workers

58 Million +
Forms Signed
& Saved

3 Million +
Certifications
Managed

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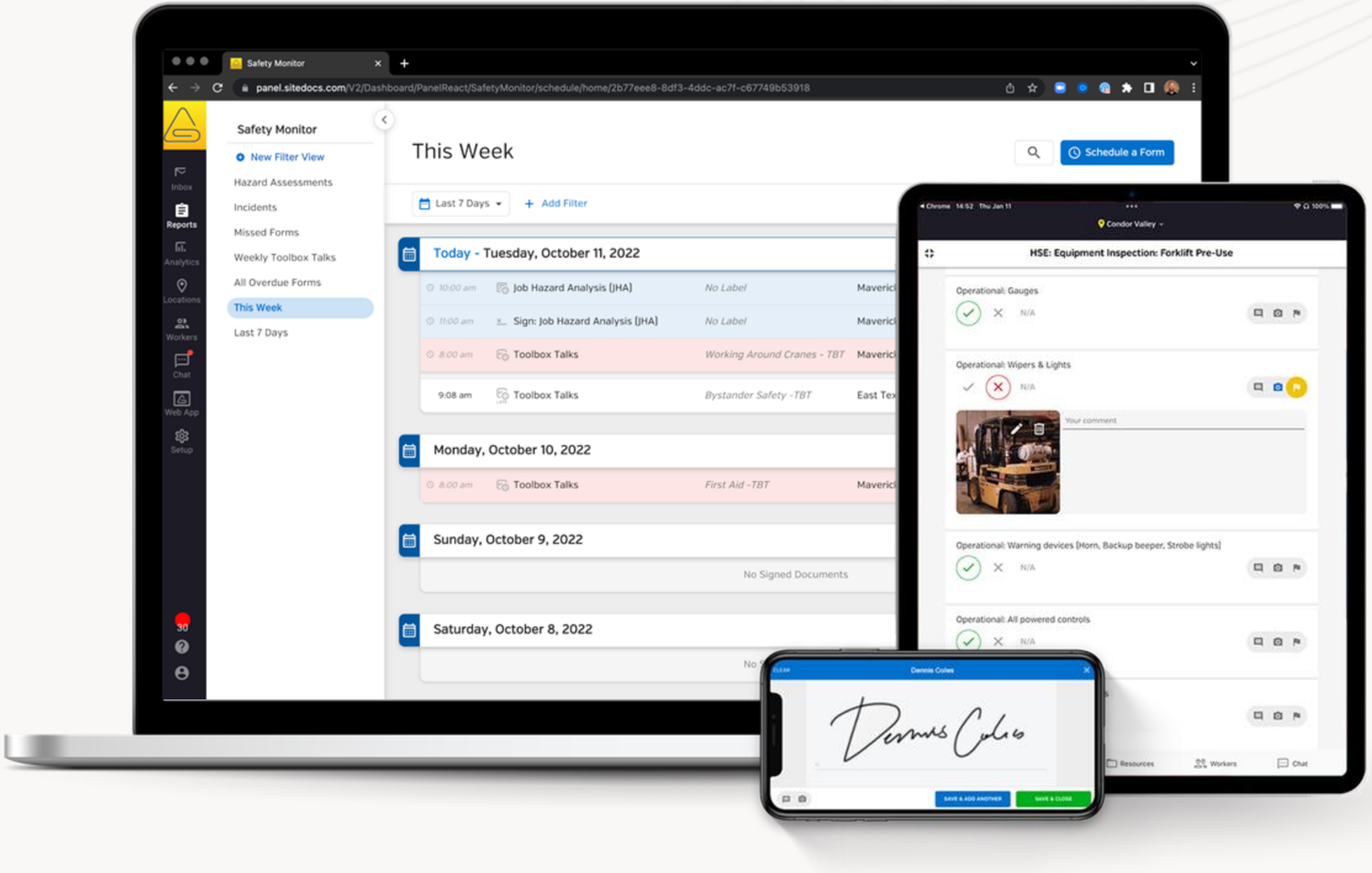
What does Safety Management look like for you today?



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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

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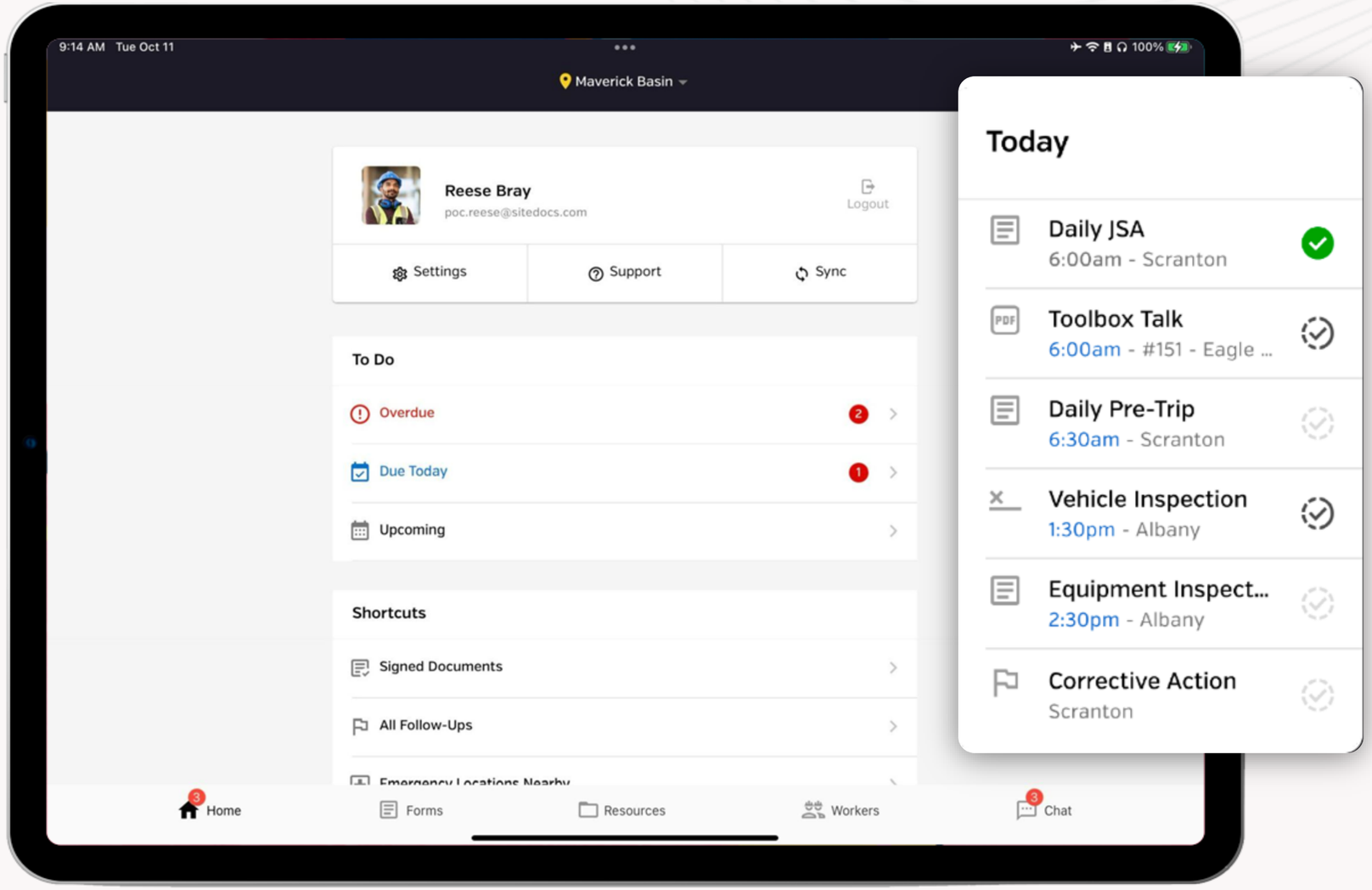
Worker *Mobile App*



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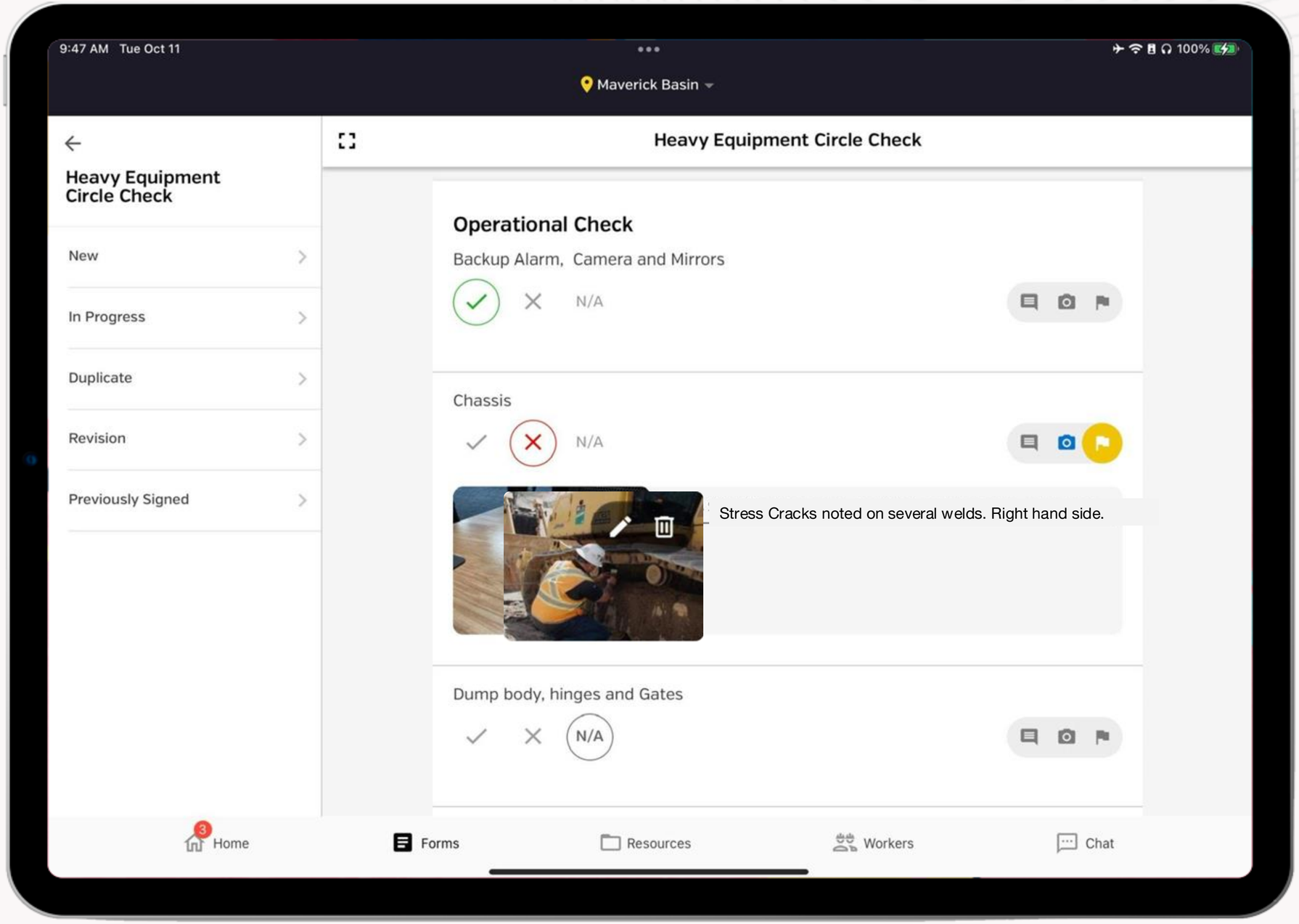

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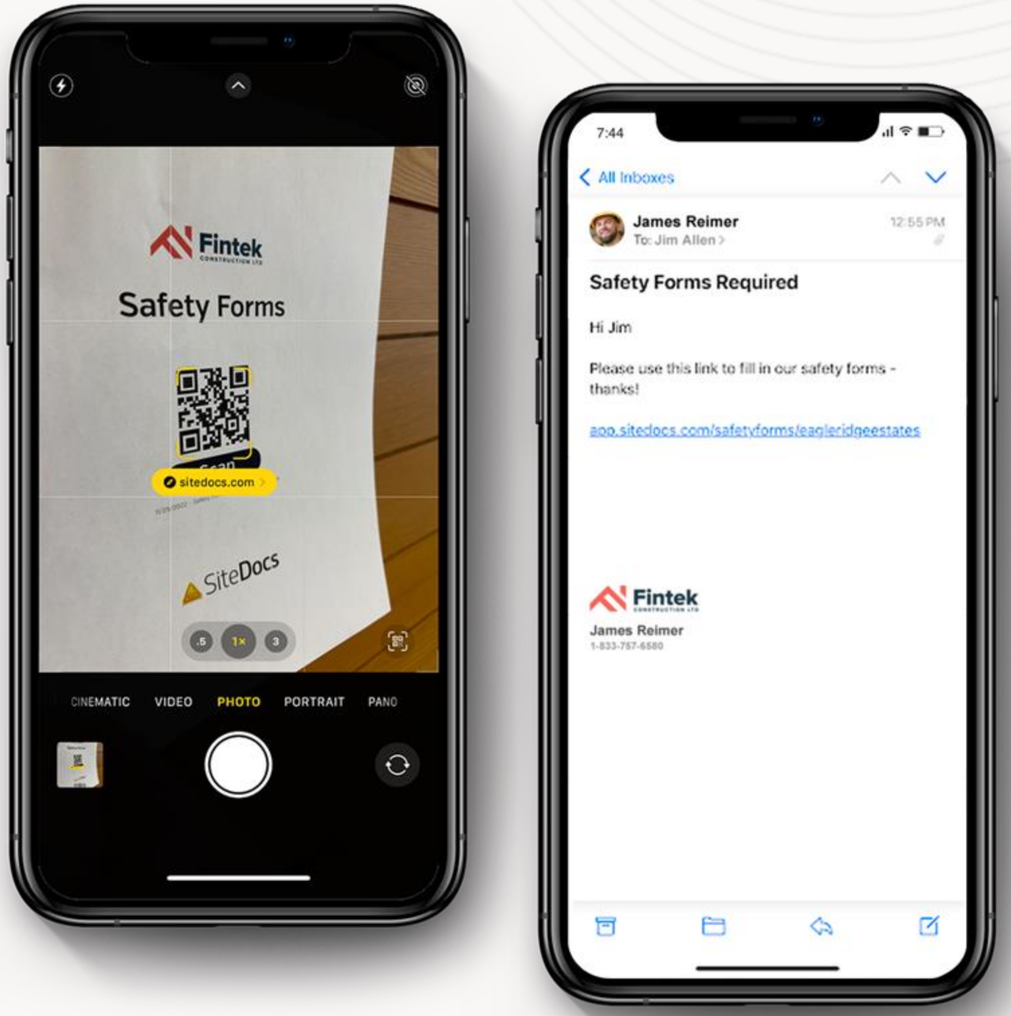
Easy Path to *Compliance For Contractors*



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

The SiteDocs Lite App means no app download is needed.

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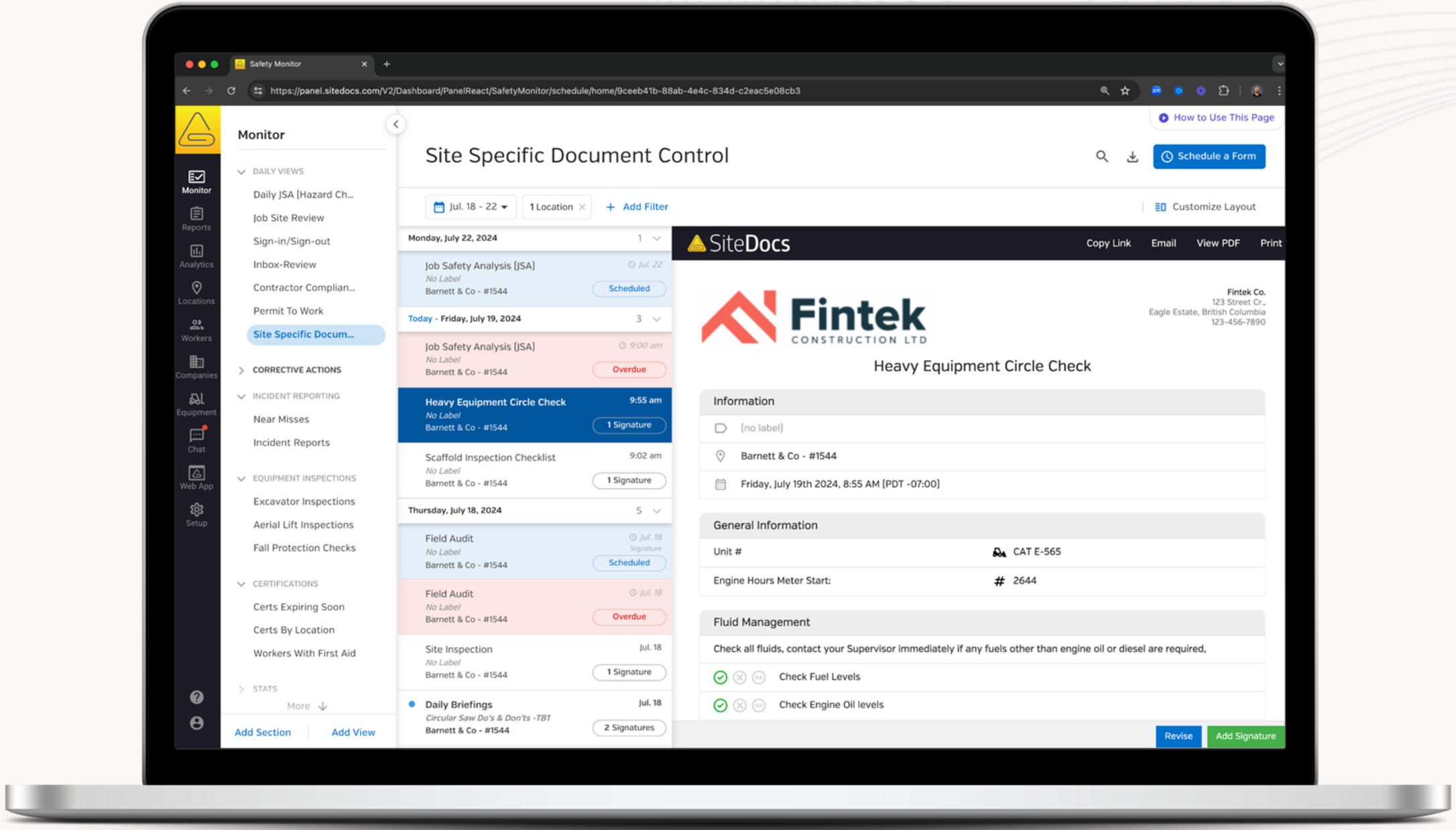

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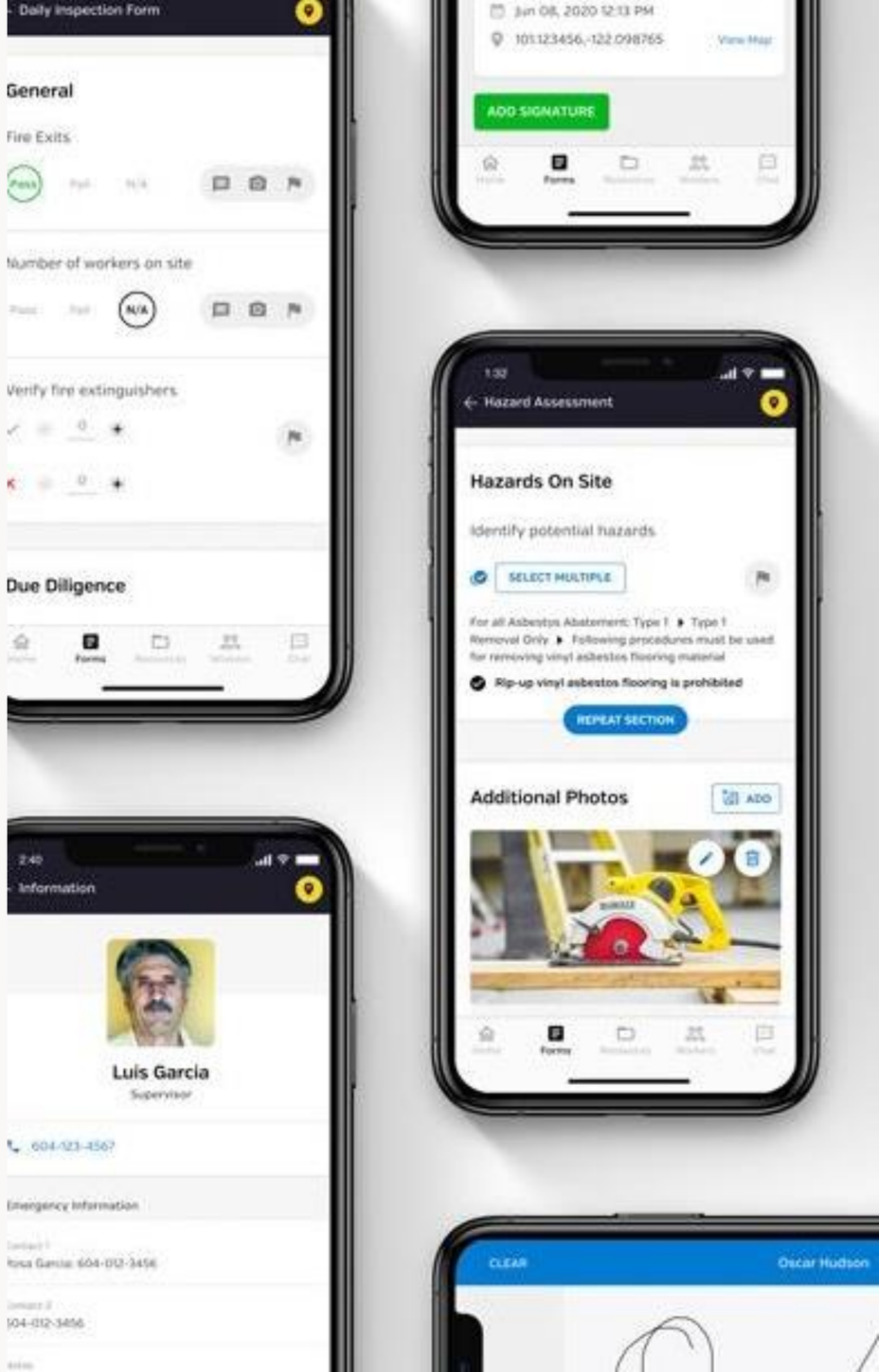
SiteDocs

What’s New for SiteDocs

2025 Year to Date Releases



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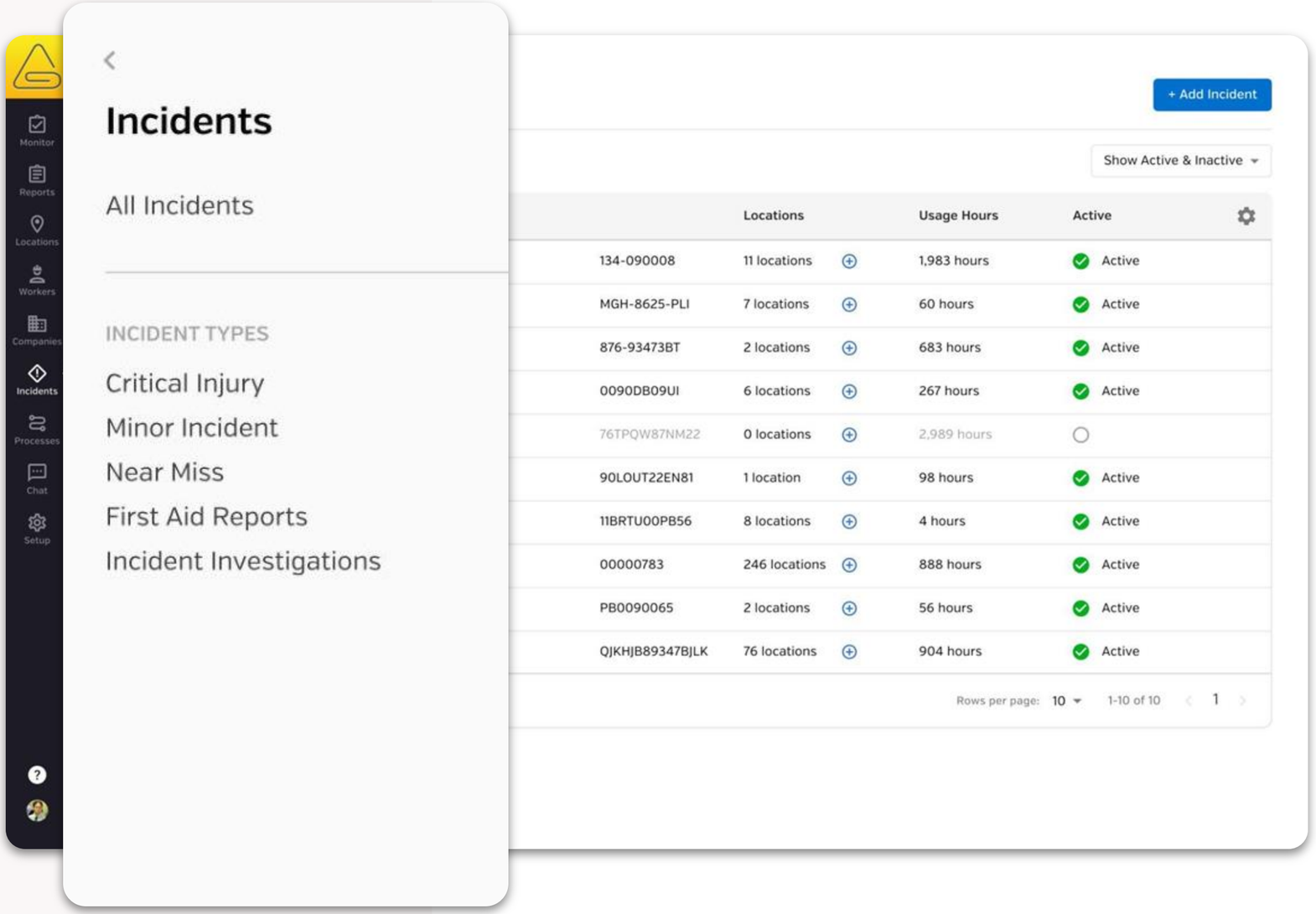
What's New

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



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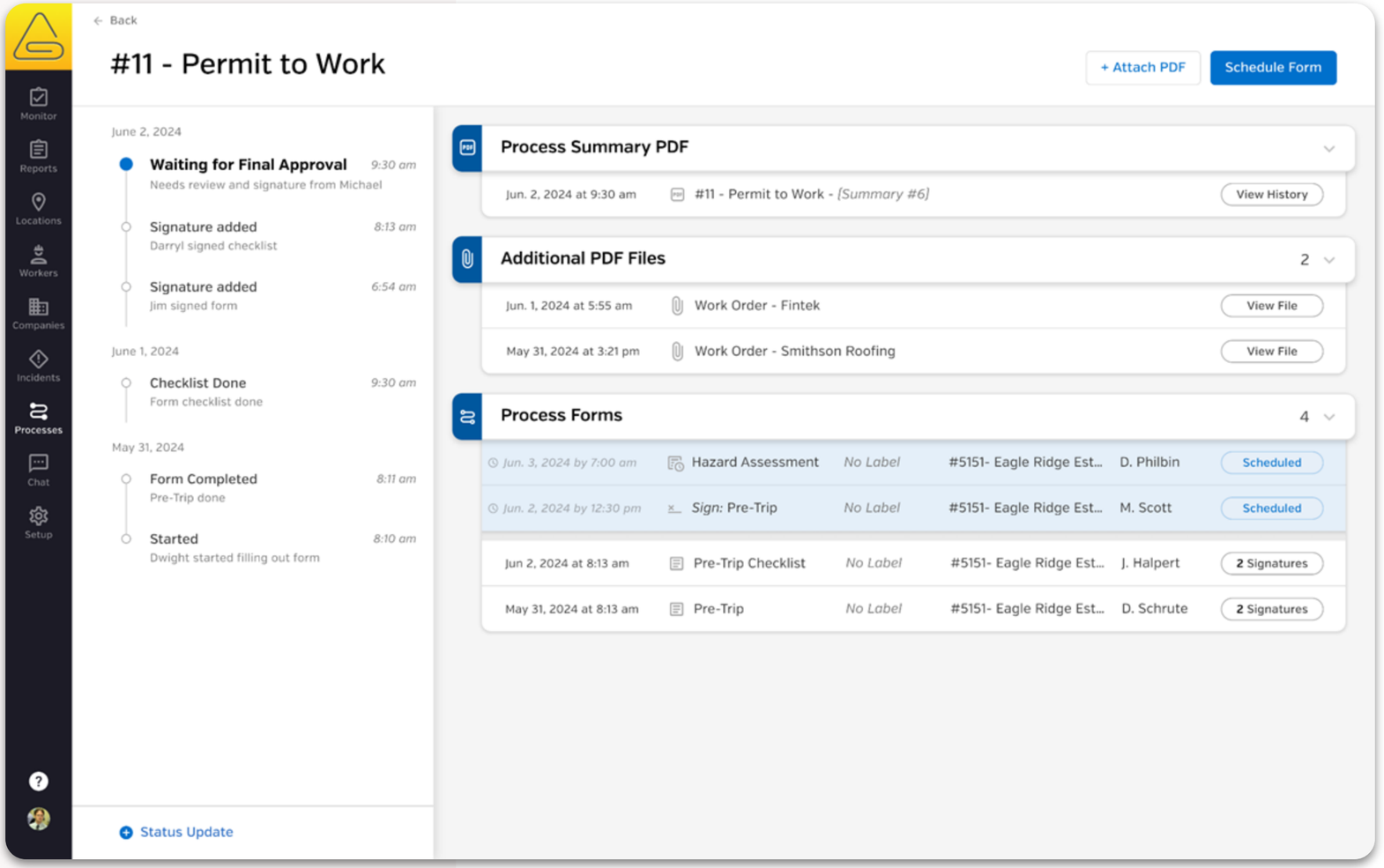
What's New

Process Folders

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



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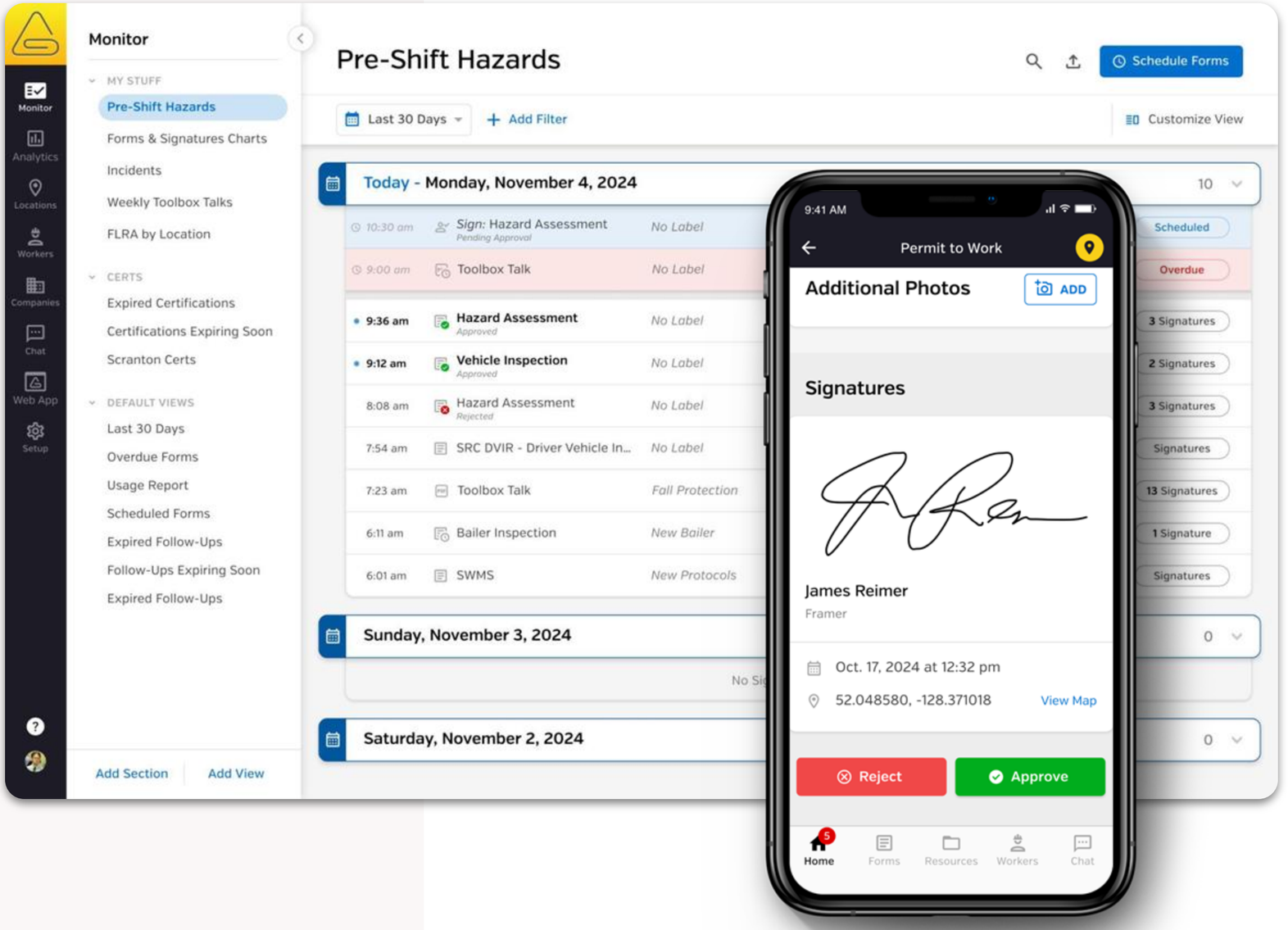
What's New

Approval Signatures

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



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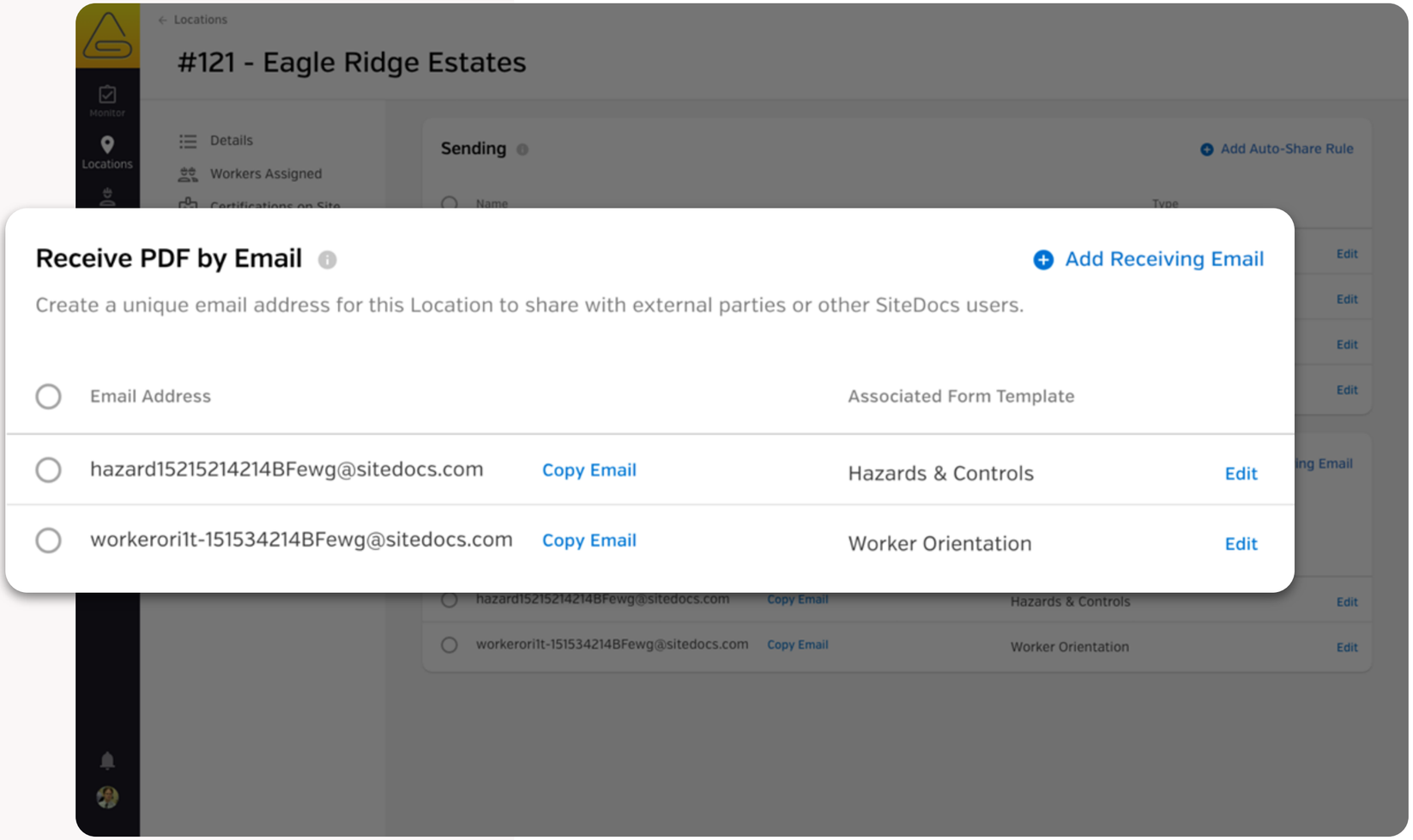
What's New

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.



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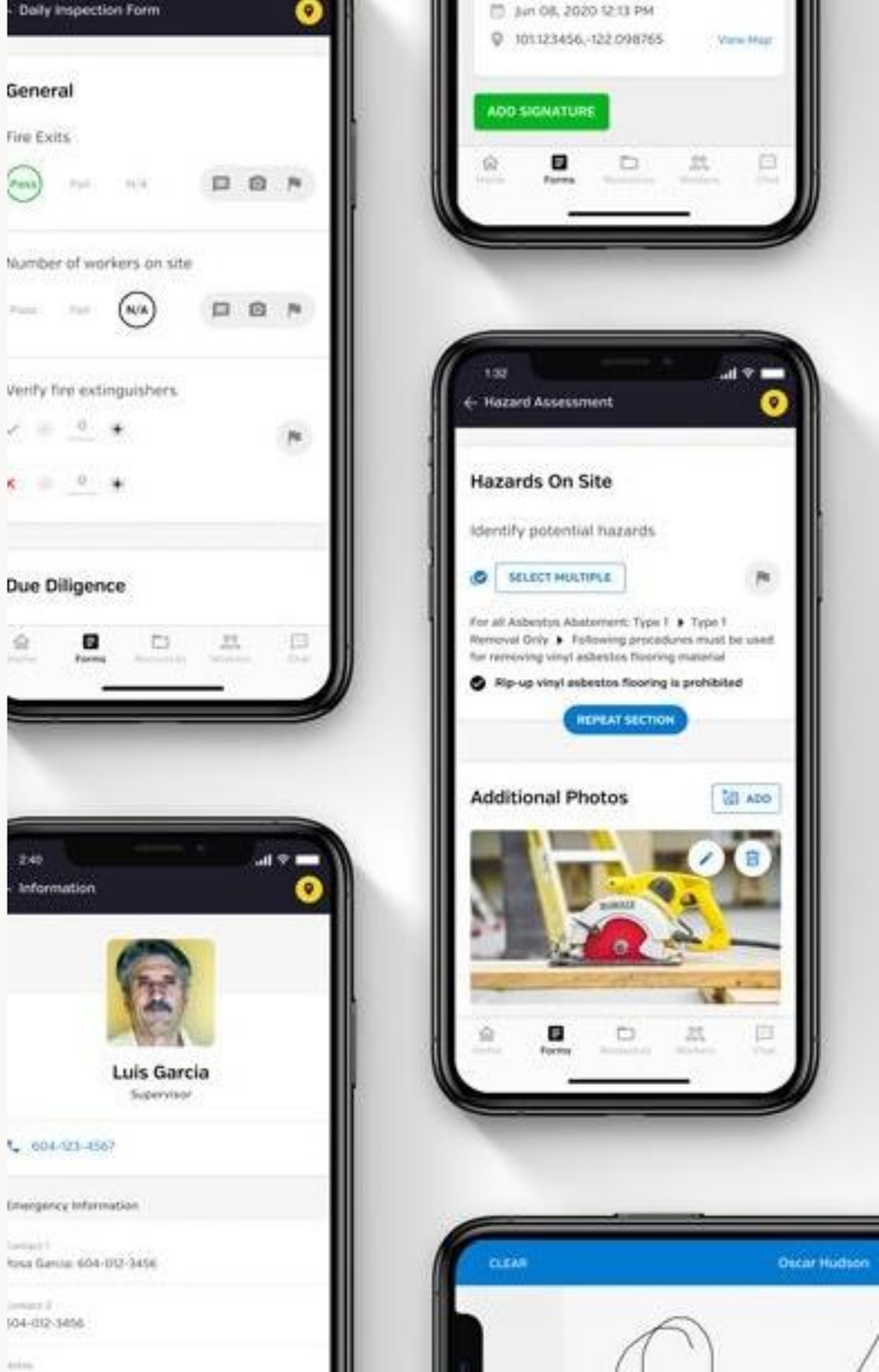
SiteDocs

What’s Next for SiteDocs

Priorities and designs are subject to change



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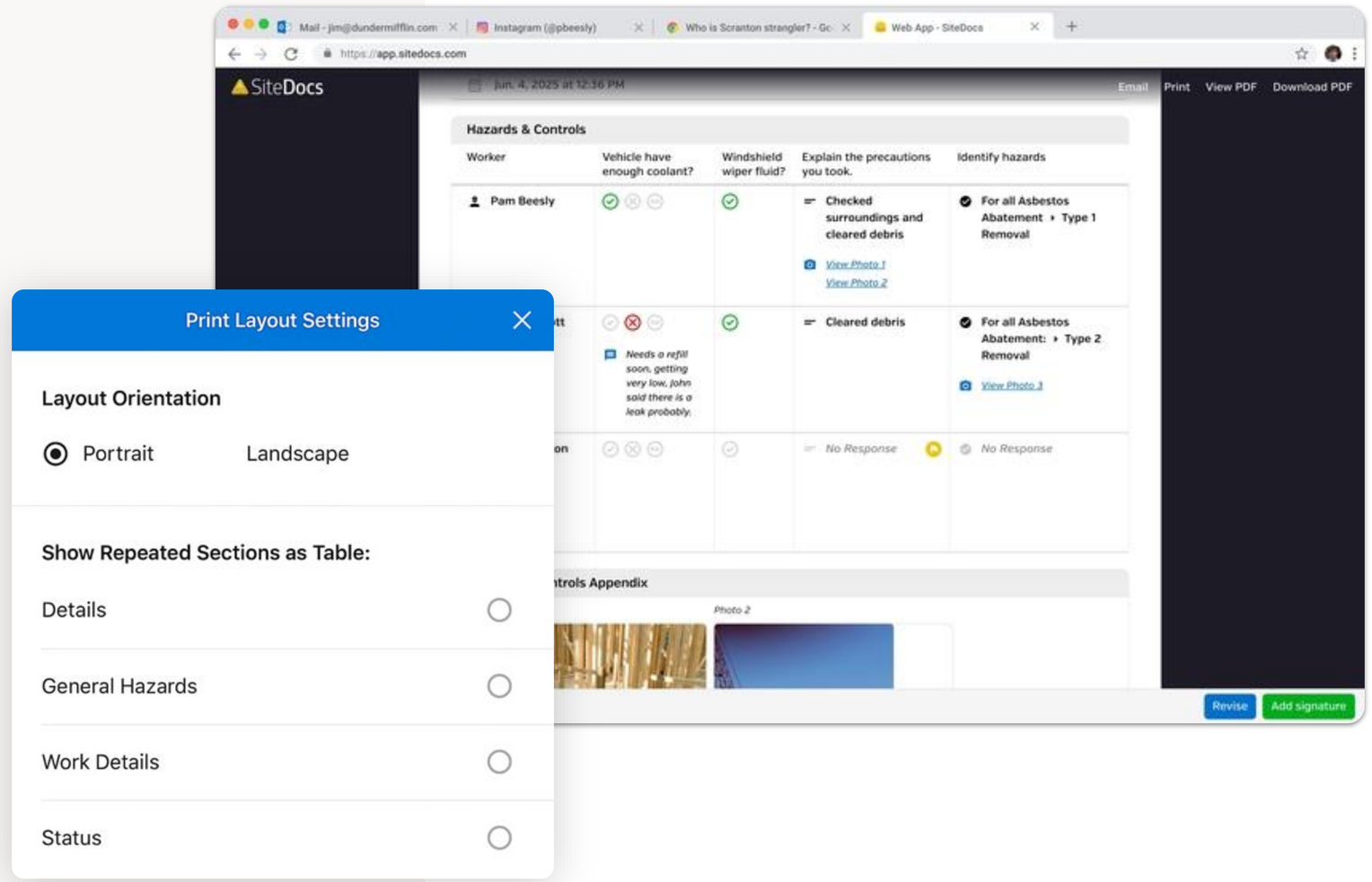
What's New

Print Layout Settings

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



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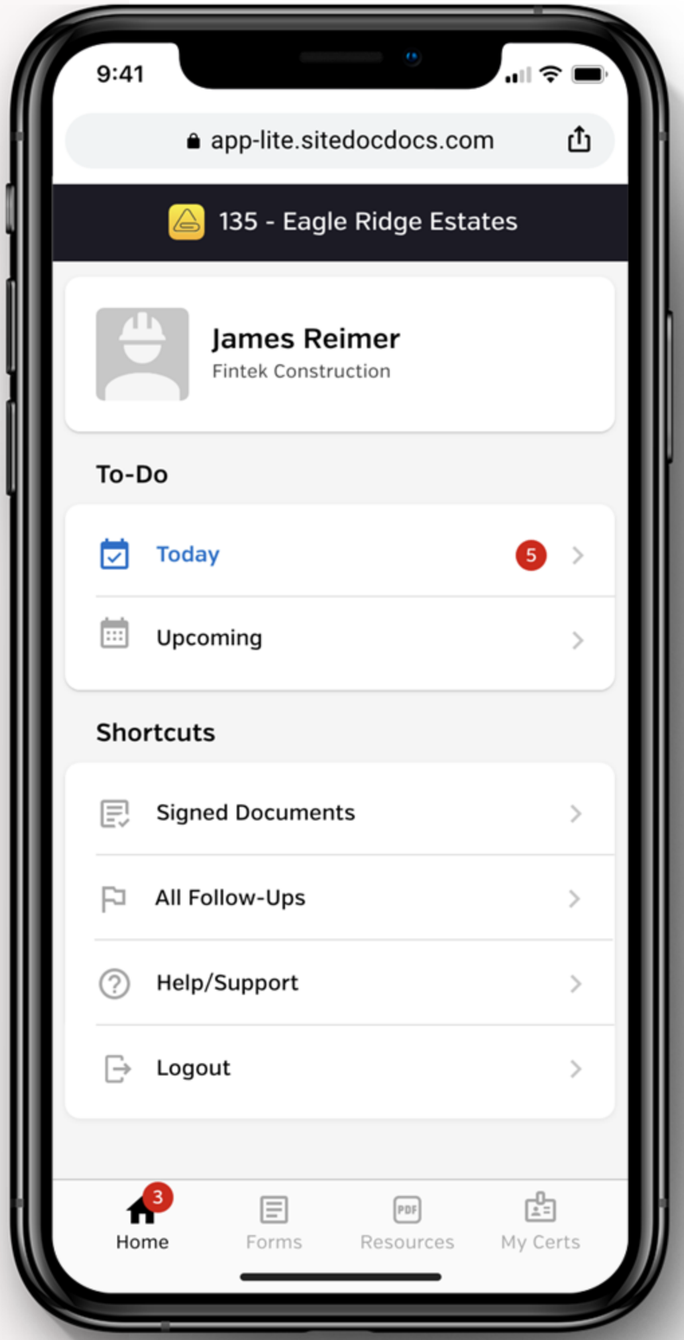
What's Next

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!



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What's Next

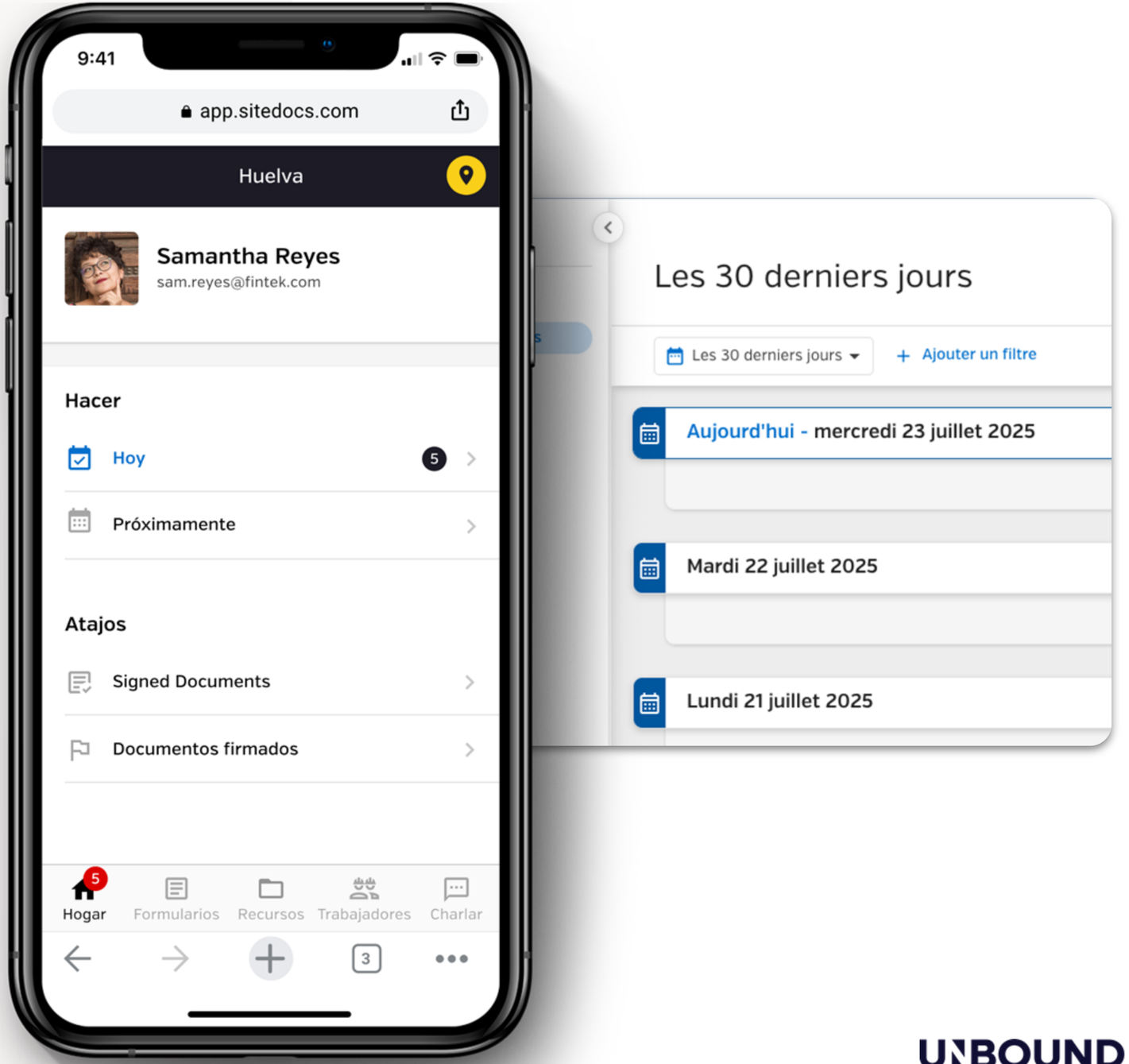
Enhanced Regional Support

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.



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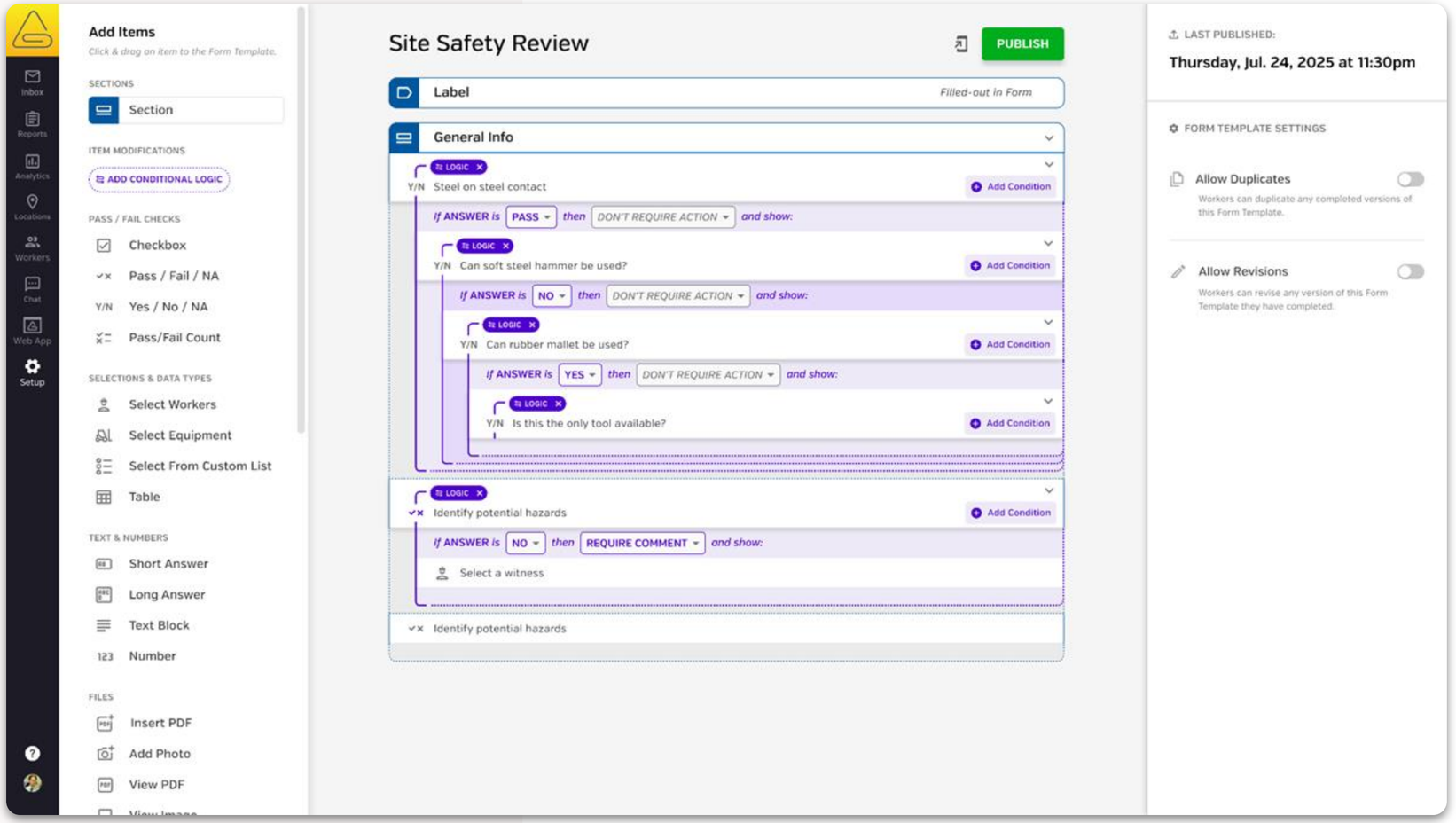
What's Next

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



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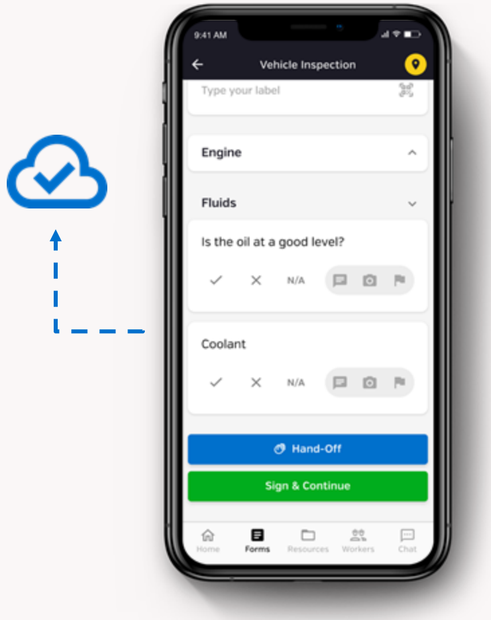
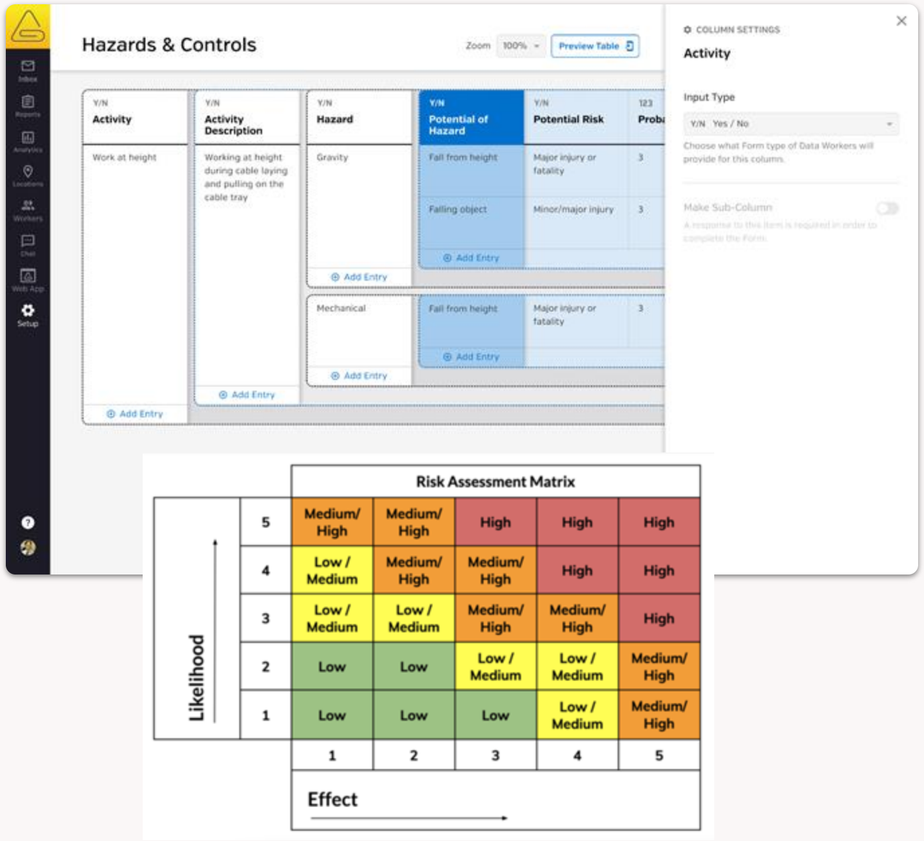
Also In Development:

Form Handoffs

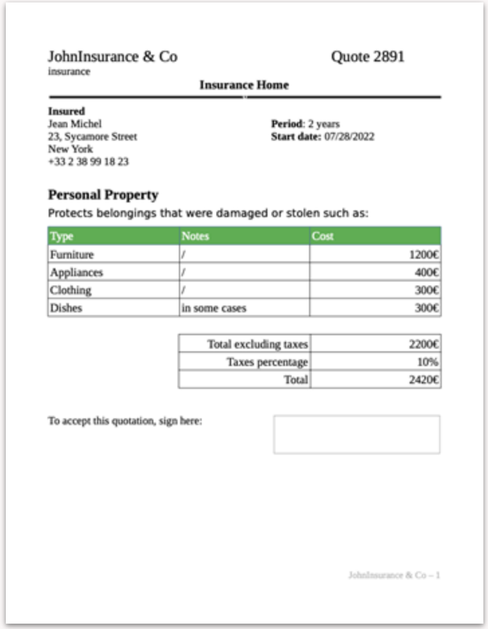


Dedicated Hazard & Control Module

Built with SWMS & RAMS in mind



Custom PDF Layouts



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insurance

Quote 2891

Insurance Home

Insured
Jean Michel
23, Sycamore Street
New York
+33 2 38 99 18 23

Period: 2 years
Start date: 07/28/2022

Personal Property

Protects belongings that were damaged or stolen such as:

Type	Notes	Cost
Furniture	/	1200€
Appliances	/	400€
Clothing	/	300€
Dishes	in some cases	300€

Total excluding taxes	2200€
Taxes percentage	10%
Total	2420€

To accept this quotation, sign here:

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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

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Thank You

Scan the QR Code to schedule a demo of SiteDocs

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