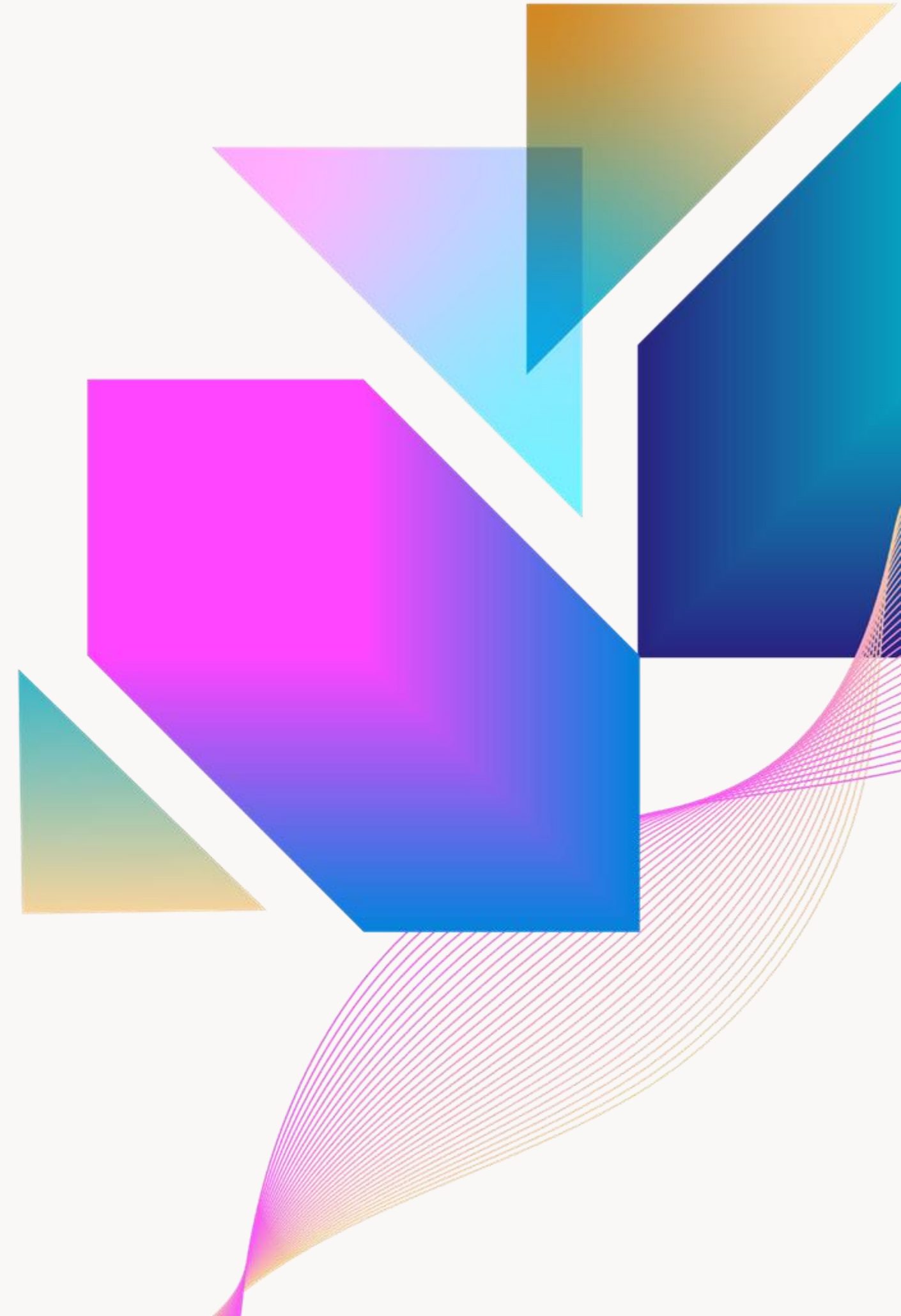




# What's New and What's Next for SiteDocs

Corbett Kaniff  
Sr. Product Manager



# 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

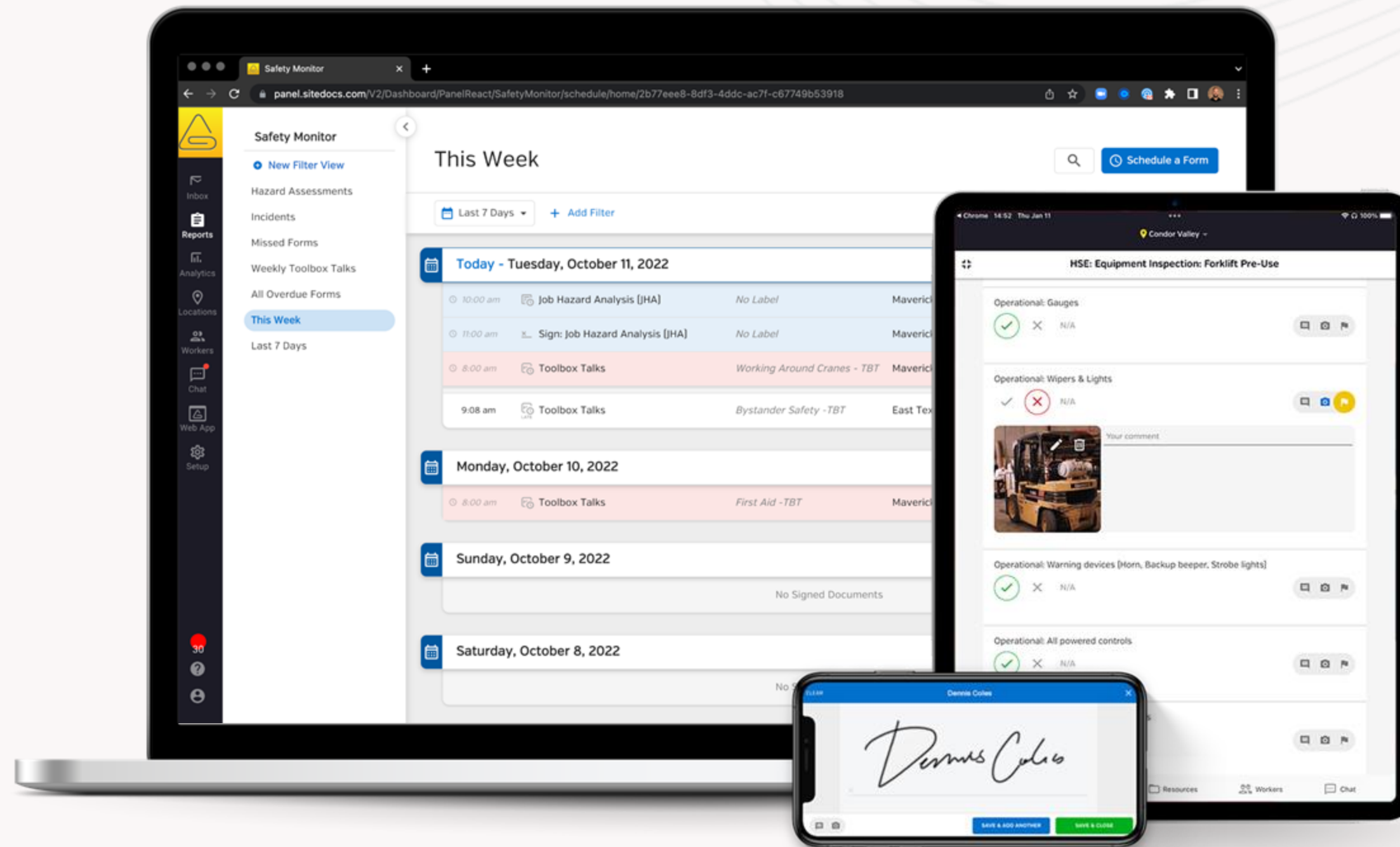
**1.3 Million +**  
Unique  
Workers

**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**

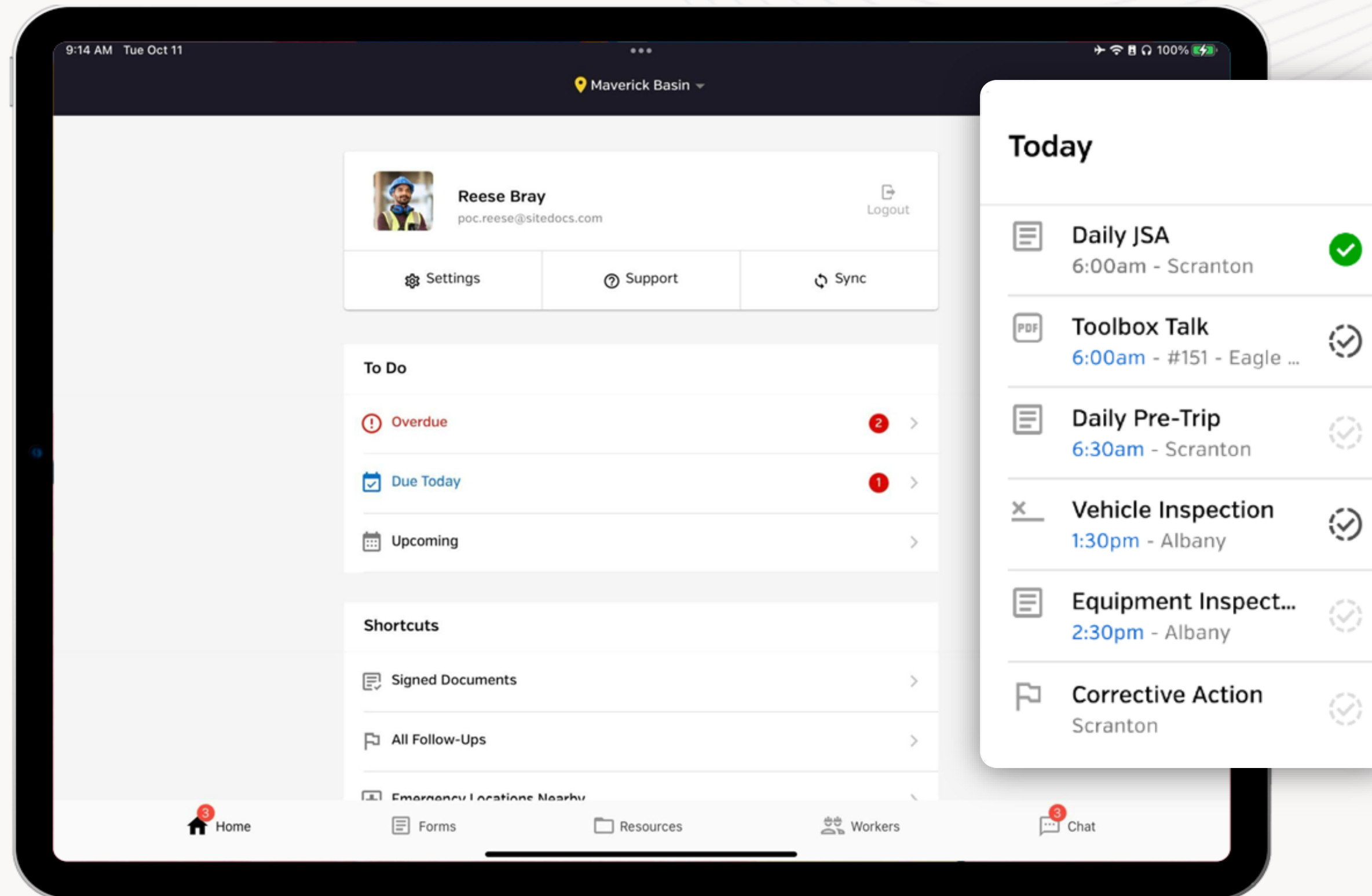


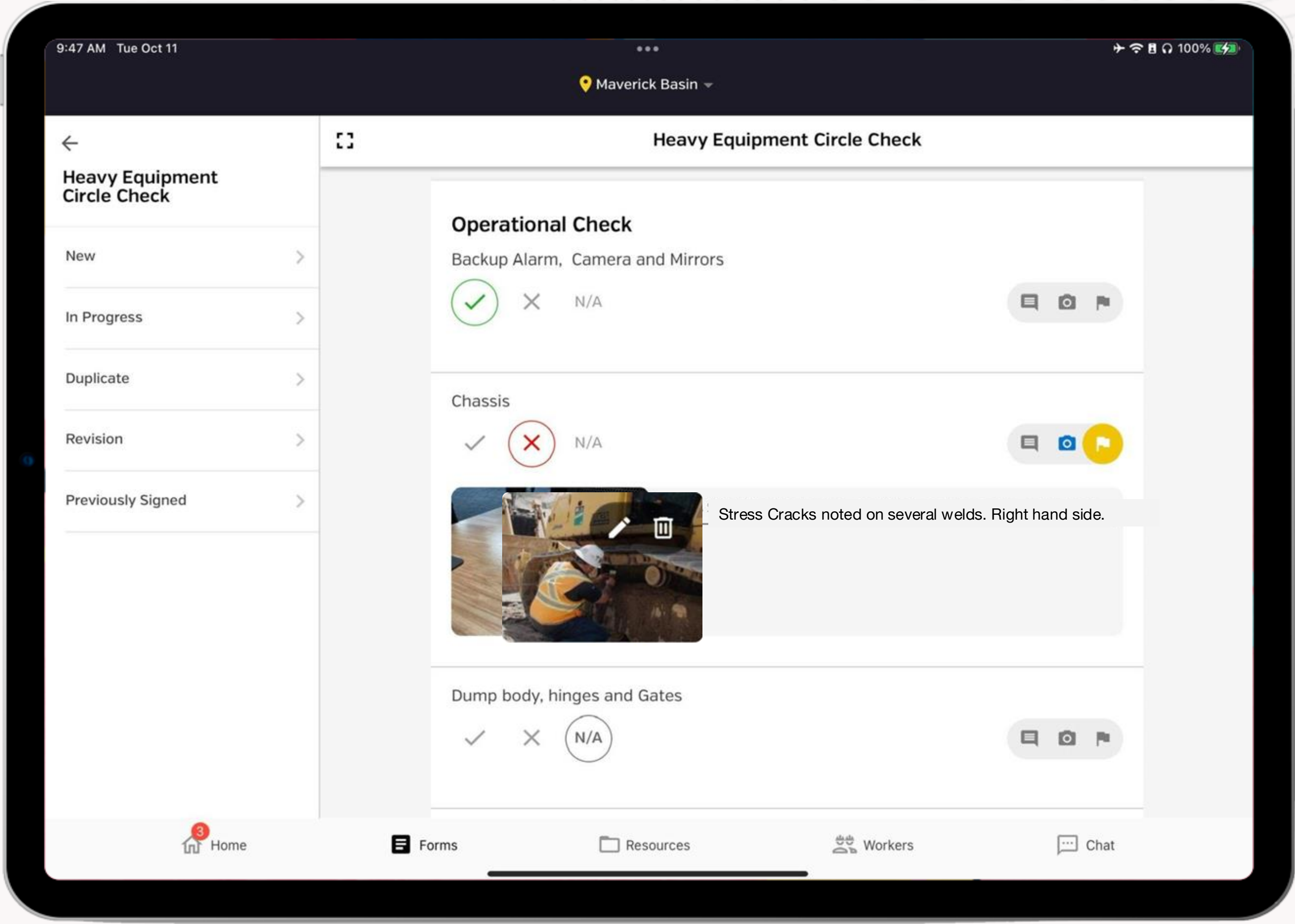
**Access  
Control**



**Data Integrations  
SSO & Sharing**

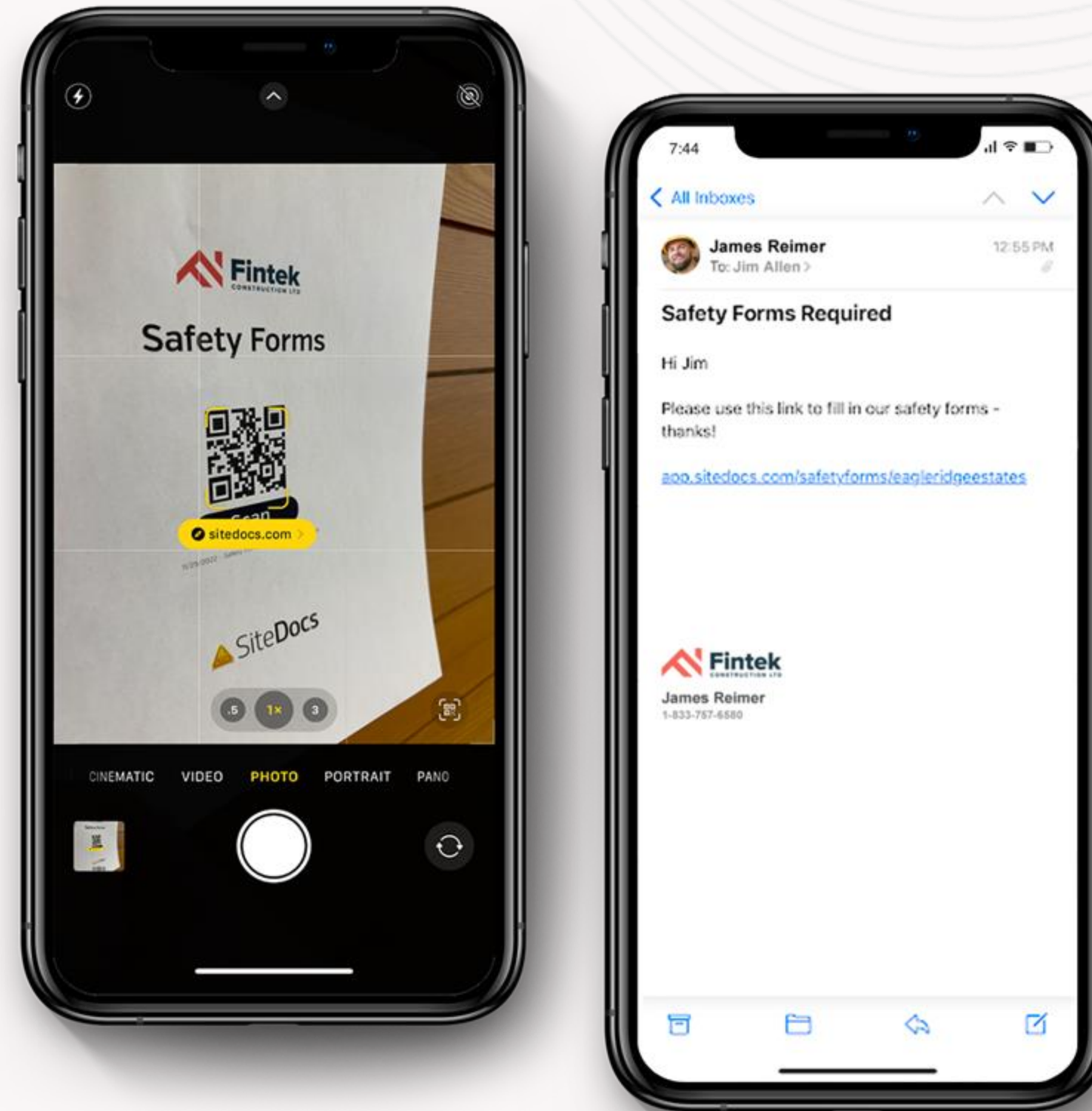
# Worker *Mobile App*





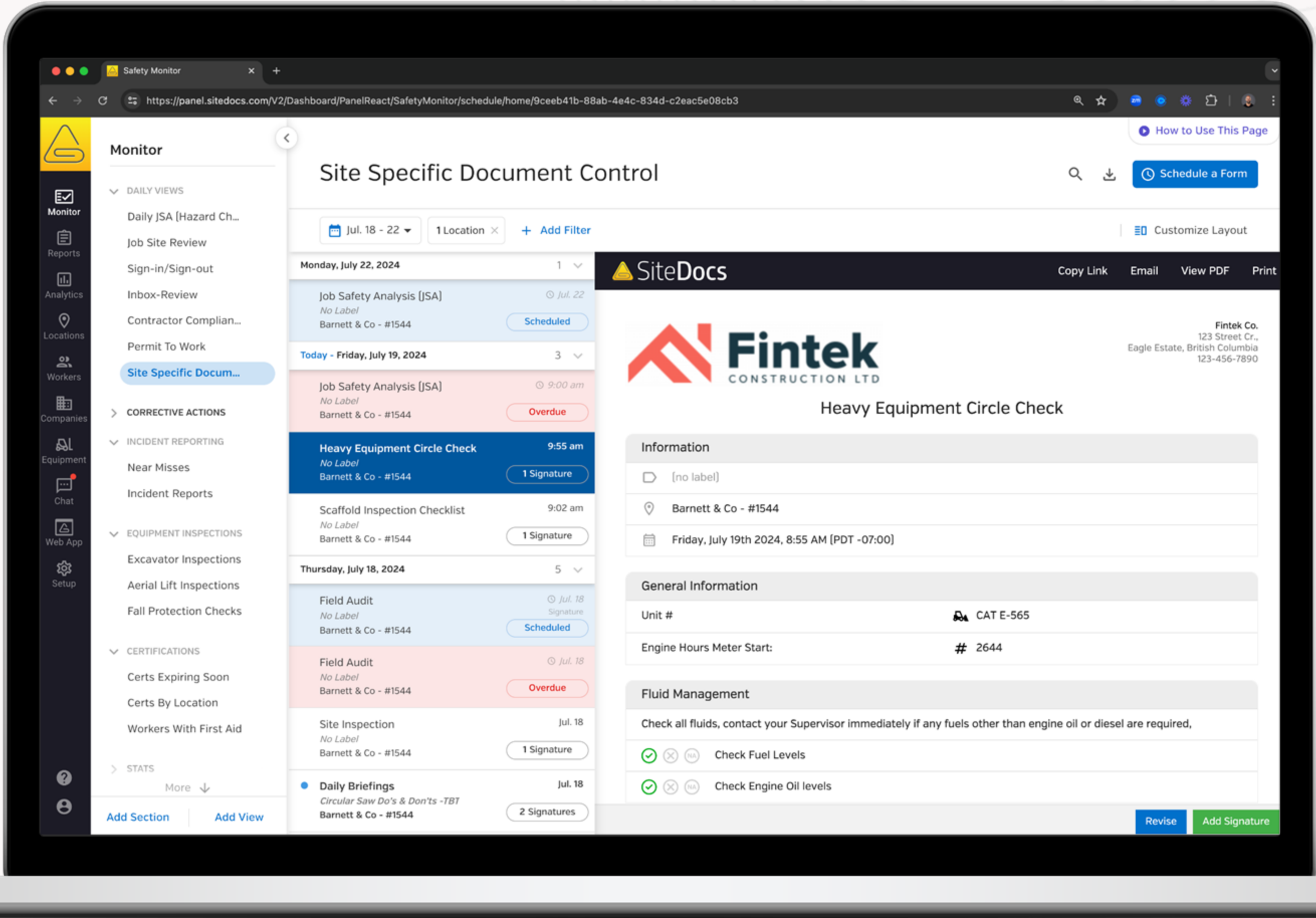


# Easy Path to *Compliance For Contractors*



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

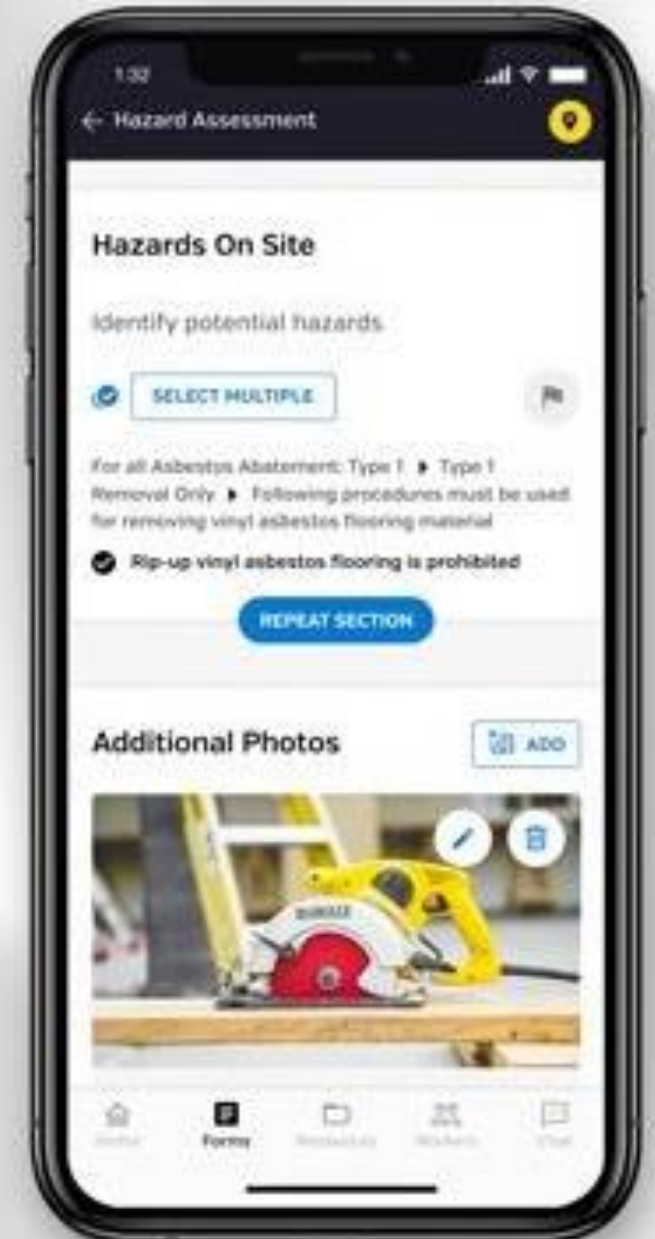
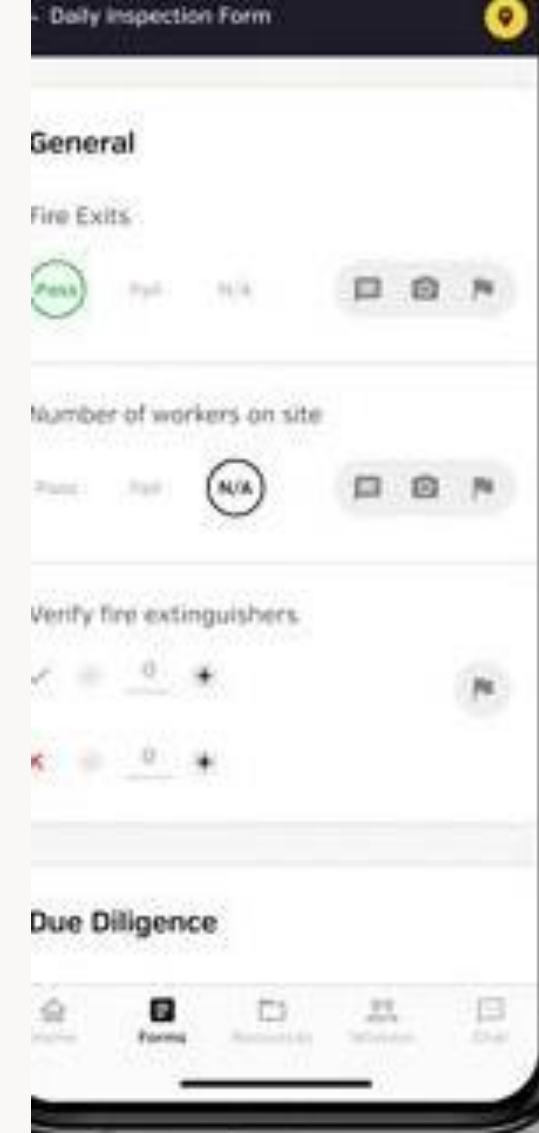
The SiteDocs Lite App means no app download is needed.





# What's New for SiteDocs

2025 Year to Date Releases



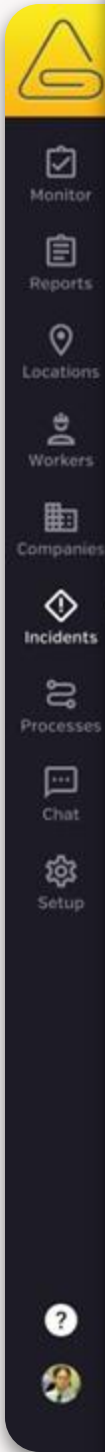


What's New



# 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



## Incidents

All Incidents

INCIDENT TYPES

- Critical Injury
- Minor Incident
- Near Miss
- First Aid Reports
- Incident Investigations

+ Add Incident

Show Active & Inactive ▾

	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	○	
90LOUT22EN81	1 location	+	98 hours	✓ Active	
11BRTU00PB56	8 locations	+	4 hours	✓ Active	
00000783	246 locations	+	888 hours	✓ Active	
PB0090065	2 locations	+	56 hours	✓ Active	
QJXHJB89347BJLK	76 locations	+	904 hours	✓ Active	

Rows per page: 10 ▾ 1-10 of 10 < 1 >

What's New



Process Folders

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

Monitor

Reports

Locations

Workers

Companies

Incidents

Processes

Chat

Setup

?

← Back

#11 - Permit to Work

+ Attach PDF

Schedule Form

June 2, 2024

●

Waiting for Final Approval9:30 am

Needs review and signature from Michael

○

Signature added8:13 am

Darryl signed checklist

○

Signature added6:54 am

Jim signed form

June 1, 2024

○

Checklist Done9:30 am

Form checklist done

May 31, 2024

○

Form Completed8:11 am

Pre-Trip done

○

Started8:10 am

Dwight started filling out form

+

Status Update

Process Summary PDF

Jun. 2, 2024 at 9:30 am

#11 - Permit to Work - [Summary #6]

View History

Additional PDF Files

2

Jun. 1, 2024 at 5:55 am

Work Order - Fintek

View File

May 31, 2024 at 3:21 pm

Work Order - Smithson Roofing

View File

Process Forms

4

Jun. 3, 2024 by 7:00 am

Hazard Assessment

No Label

#5151- Eagle Ridge Est...

D. Philbin

Scheduled

Jun. 2, 2024 by 12:30 pm

Sign: Pre-Trip

No Label

#5151- Eagle Ridge Est...

M. Scott

Scheduled

Jun 2, 2024 at 8:13 am

Pre-Trip Checklist

No Label

#5151- Eagle Ridge Est...

J. Halpert

2 Signatures

May 31, 2024 at 8:13 am

Pre-Trip

No Label

#5151- Eagle Ridge Est...

D. Schrute

2 Signatures

What's New



# Approval Signatures

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

Monitor

Analytics

Locations

Workers

Companies

Chat

Web App

Setup

?

Monitor

MY STUFF

Pre-Shift Hazards

Forms & Signatures Charts

Incidents

Weekly Toolbox Talks

FLRA by Location

CERTS

Expired Certifications

Certifications Expiring Soon

Scranton Certs

DEFAULT VIEWS

Last 30 Days

Overdue Forms

Usage Report

Scheduled Forms

Expired Follow-Ups

Follow-Ups Expiring Soon

Expired Follow-Ups

Add Section

Add View

Pre-Shift Hazards

Last 30 Days

Add Filter

Customize View

Schedule Forms

Today - Monday, November 4, 2024

10:30 am

Sign: Hazard Assessment

Pending Approval

No Label

9:00 am

Toolbox Talk

No Label

9:36 am

Hazard Assessment

Approved

No Label

9:12 am

Vehicle Inspection

Approved

No Label

8:08 am

Hazard Assessment

Rejected

No Label

7:54 am

SRC DVIR - Driver Vehicle In...

No Label

7:23 am

Toolbox Talk

Fall Protection

6:11 am

Bailer Inspection

New Bailer

6:01 am

SWMS

New Protocols

Sunday, November 3, 2024

Saturday, November 2, 2024

9:41 AM

Permit to Work

Additional Photos

ADD

Signatures

James Reimer

Framer

Oct. 17, 2024 at 12:32 pm

52.048580, -128.371018

View Map

Reject

Approve

Home

Forms

Resources

Workers

Chat





# 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

Add Auto-Share Rule

Receive PDF by Email

+ Add Receiving 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

Edit

workerori1t-151534214BFewg@sitedocs.com

Copy Email

Worker Orientation

Edit

hazard15215214214BFewg@sitedocs.com

Copy Email

Hazards & Controls

Edit

workerori1t-151534214BFewg@sitedocs.com

Copy Email

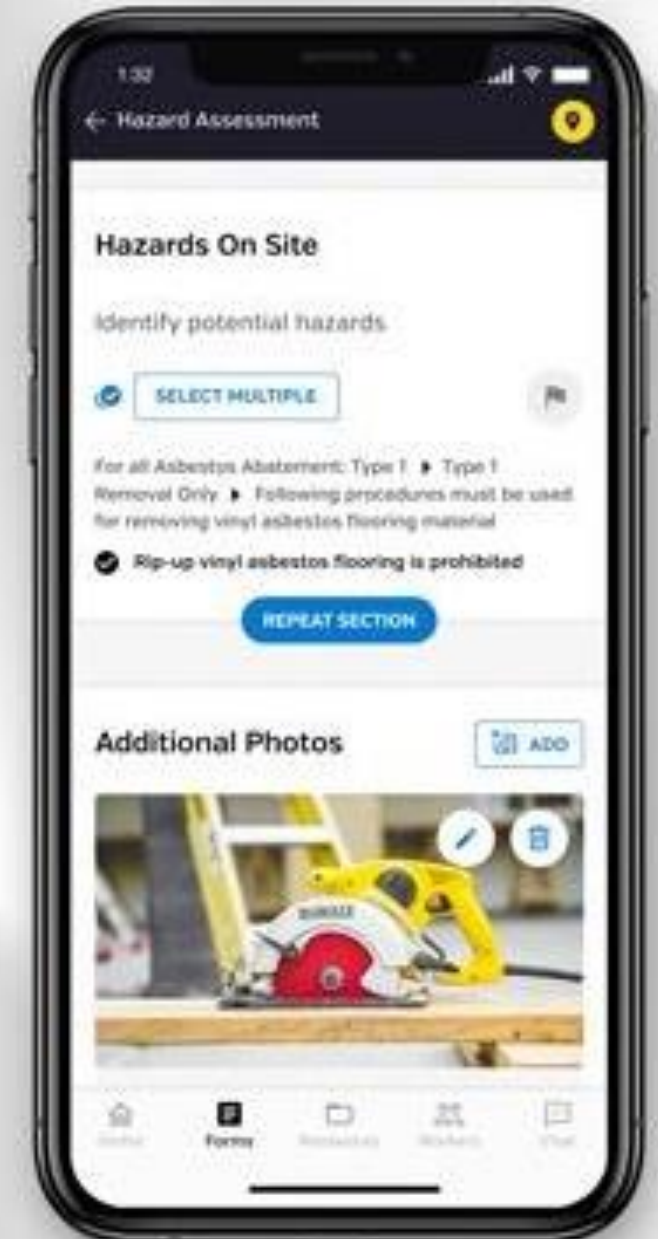
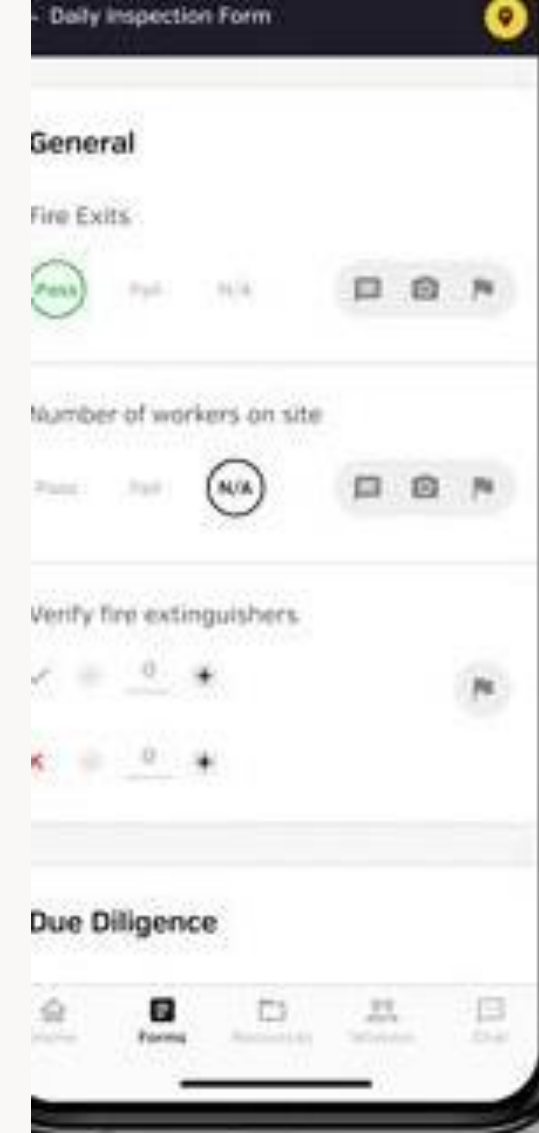
Worker Orientation

Edit



# 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

SiteDocs

Jun. 4, 2025 at 12:16 PM

Email Print View PDF Download PDF

Hazards & Controls

Worker	Vehicle have enough coolant?	Windshield wiper fluid?	Explain the precautions you took.	Identify hazards
Pam Beesly	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div>Checked surroundings and cleared debris</div> <div><div>View Photo 1</div><div>View Photo 2</div></div>	<div>For all Asbestos Abatement: Type 1 Removal</div>
	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div>Cleared debris</div> <div><div>Needs a refill soon, getting very low, John said there is a leak probably;</div></div>	<div>For all Asbestos Abatement: Type 2 Removal</div> <div><div>View Photo 1</div></div>
on	<div><div></div><div></div><div></div></div>	<div><div></div></div>	<div>No Response</div>	<div>No Response</div>

Controls Appendix

Photo 2

Revise

Add signature

Print Layout Settings

Layout Orientation

PortraitLandscape

Show Repeated Sections as Table:

Details

General Hazards

Work Details

Status



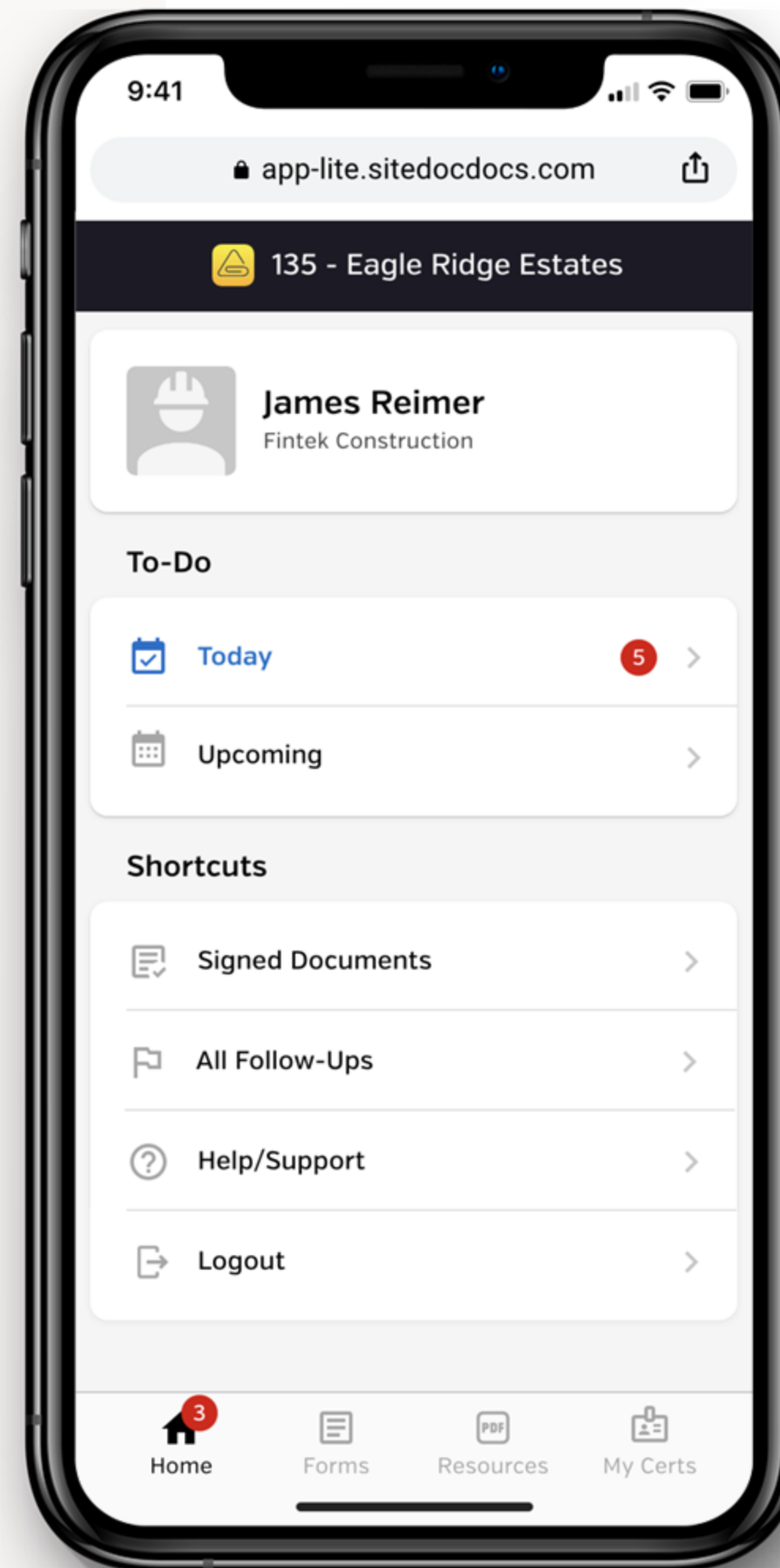
## What's Next



# 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



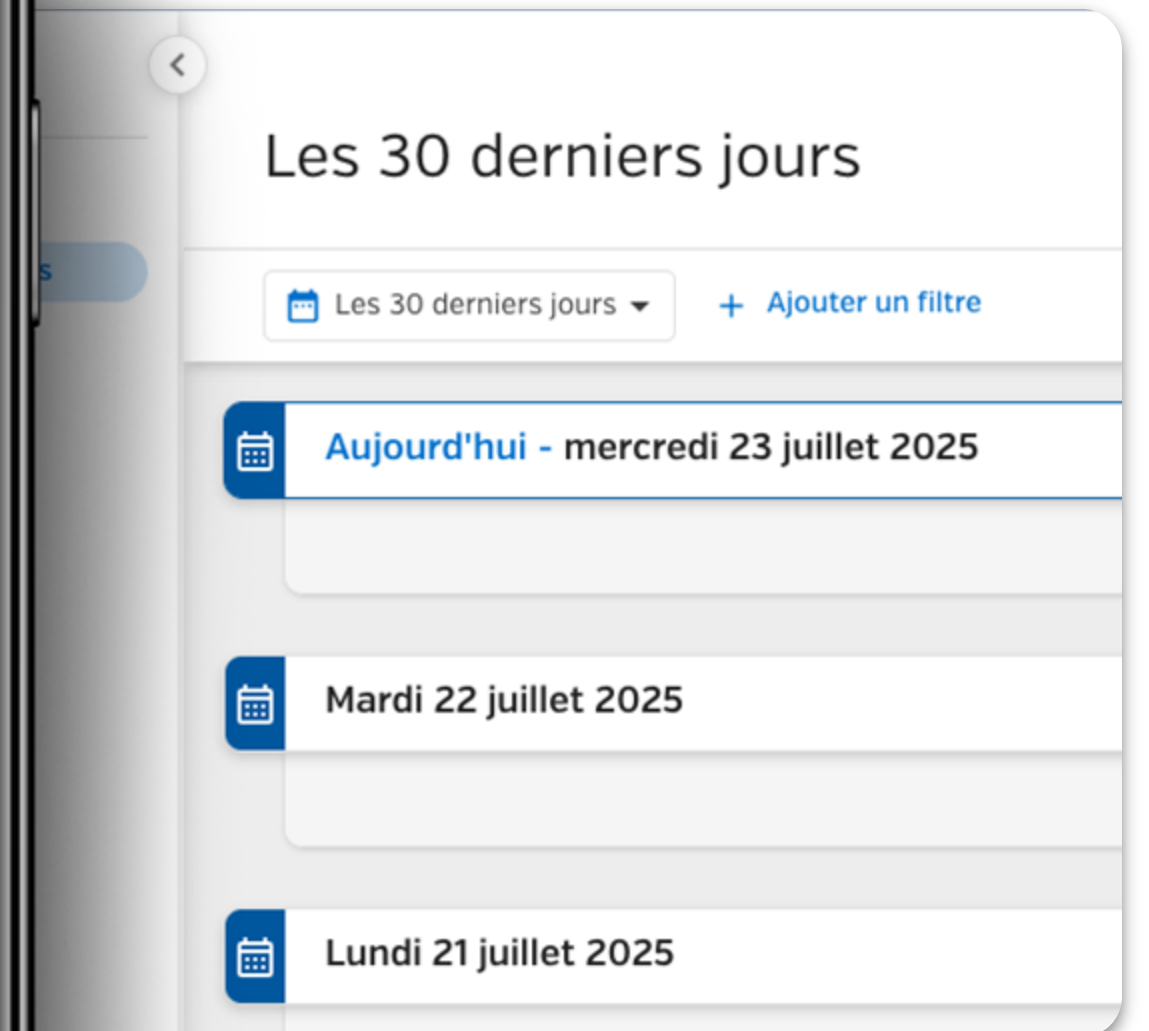
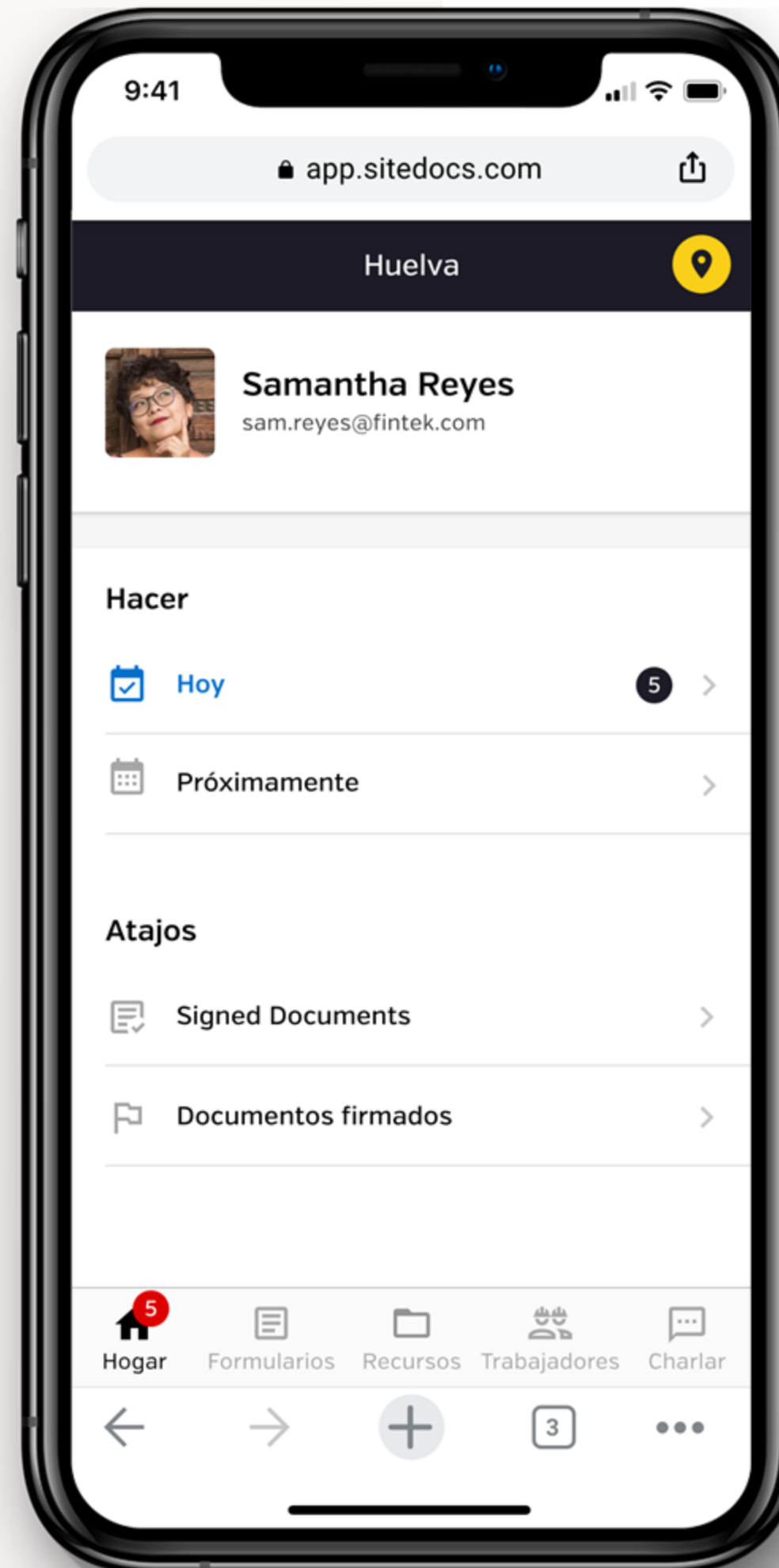
# Enhanced Regional Support

## 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

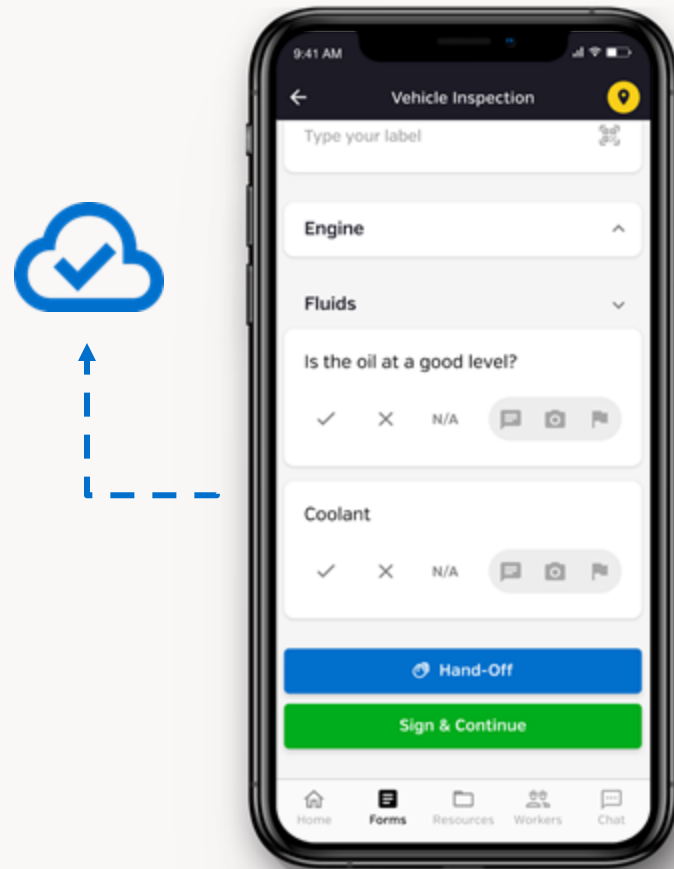
The screenshot displays the 'Next-Gen Forms' interface for creating a 'Site Safety Review' form. The interface is divided into three main panels:

- Left Panel (Add Items):** A sidebar with a 'Setup' icon at the top. Below it, a list of items to add to the form template, categorized into:
  - SECTIONS:** Section
  - ITEM MODIFICATIONS:** ADD CONDITIONAL LOGIC
  - PASS / FAIL CHECKS:** Checkbox, Pass / Fail / NA, Yes / No / NA, Pass/Fail Count
  - SELECTIONS & DATA TYPES:** Select Workers, Select Equipment, Select From Custom List, Table
  - TEXT & NUMBERS:** Short Answer, Long Answer, Text Block, Number
  - FILES:** Insert PDF, Add Photo, View PDF, View Image
- Center Panel (Form Builder):** The main workspace for editing the form. It shows a 'Site Safety Review' form with a 'Label' field and a 'General Info' section. The form includes several conditional logic rules:
  - Rule 1:** If ANSWER is PASS then DON'T REQUIRE ACTION and show: Steel on steel contact.
  - Rule 2:** If ANSWER is NO then DON'T REQUIRE ACTION and show: Can soft steel hammer be used?
  - Rule 3:** If ANSWER is YES then DON'T REQUIRE ACTION and show: Can rubber mallet be used?
  - Rule 4:** If ANSWER is YES then DON'T REQUIRE ACTION and show: Is this the only tool available?
  - Rule 5:** If ANSWER is NO then REQUIRE COMMENT and show: Identify potential hazards.
- Right Panel (Form Template Settings):** A sidebar with settings for the form template. It includes a 'PUBLISH' button, a 'LAST PUBLISHED' date (Thursday, Jul. 24, 2025 at 11:30pm), and two toggle switches: 'Allow Duplicates' and 'Allow Revisions'.



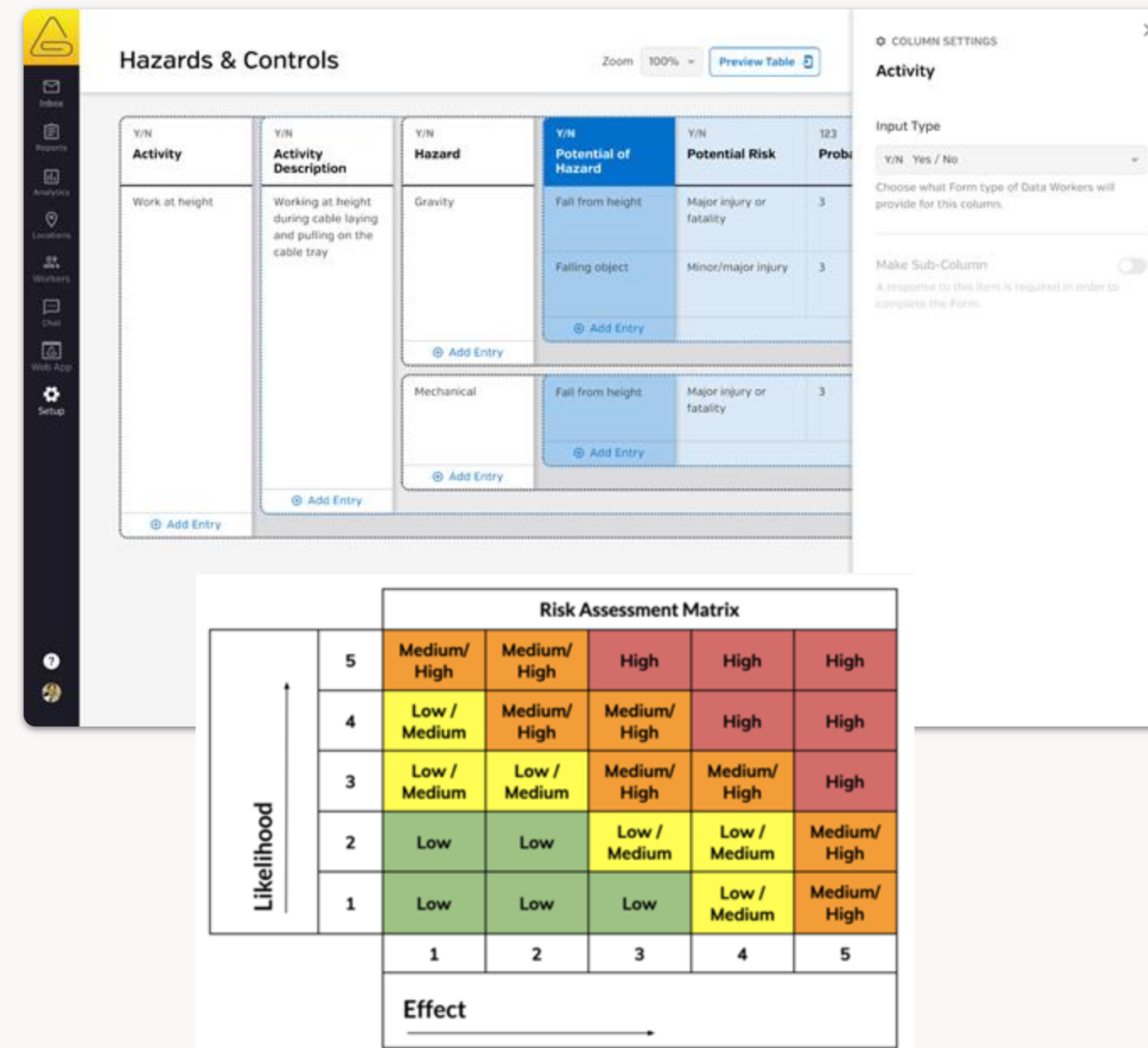
## Also In Development:

## Form Handoffs



## Dedicated Hazard & Control Module

Built with SWMS & RAMS in mind



## Custom PDF Layouts

# JohnInsurance & Co

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:

JohnInsurance & Co -- 1

# 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

