



To create a new entry from Registers/Meetings & Minutes click **+ADD NEW**.

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+ADD NEW

EXCEL	PDF	FILTER	GROUP	Search...						
Title	Meeting Ty...	Scheduled Date...	Location / Worksite	Presenter	Actual Date & T...	Completed	Published	Signed Off		
Safety meeting review	Safety	01/02/2022 09:30	Local: Warehouse 2 Office	Mobile Craig		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Safety meeting review	Safety	03/12/2021 09:30	Local: Warehouse 2 Office	Mobile Craig	01/12/2021 18:17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

A. Creating Meeting

1. Type in a Title for the meeting
2. Select a **Meeting Type**.
3. Location Type will default to Local – select from the list as required or click **+** to add a new one. See below for Customer options.
4. Single Presenter will be selected as default – Multi Presenter is **NOT** currently available.
5. Select who will be taking the meeting.
6. Use Template Form will be selected as default – Use Agenda Items is **NOT** currently available.
7. Choose the Meeting Template to be used – see notes.
8. Type in any additional Meeting Notes as prompts for the presenter

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SAVE **DELETE** **BACK**

Title: Management Group **1**

Meeting Type: Safety **2**

LocationType: Local **3** Customer Site
Warehouse 2 Office

Presenter: Single Presenter **4** Multi Presenter **5** George Foreman **14** Completed

Meeting Template: Use Template Form **6** Use Agenda Items **7** AA-M02 - ToolBox Prestart Meeting Report - v1

Meeting Notes **8**

9. Use the Date & Time buttons to select the requested Start & Finish details. Date Added will auto populate.
10. Schedule Regular Meeting defaults to No, you will need to save & reopen the meeting to select Yes – see section B.
11. Use the normal process to **select staff** either individually or populate with all – this can be left blank.
12. To attach any other documents for staff to review click **+ADD FILE**.
13. Click **SAVE** (see above image).

Requested Start Date & Time: 9/11/2021 07:00 **9**

Requested Finish Date & Time: 9/11/2021 07:30

Date Added: 9/11/2021

Actual Start Time: 9/11/2021 06:49

Actual Finish Time: 9/11/2021 06:54 **15**

Schedule Regular Meeting: Yes No **10** See Section B Signed Off

Staff: Rover Alpine **11**

Staff	Attended	Viewed ...	Signed Off	
Rover Alpine 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Mobile Craig	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Kermit Frog	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Other Attendees **17**

First Name	Last Name	Company	Email	Send M...
Blake	Green	Laser printer	Heidi@celoces.com	<input checked="" type="checkbox"/>

Minutes Reviewed By: **See Section C** Minutes Published: **PUBLISH MINUTES**

Documents **12** **+ADD FILE**

Last Modified Time	Title	Description	Action

14. Completed will be ticked once Finish is selected in mobile app.
15. Signed Off will be ticked once task is signed off in mobile app.
16. Ticks will appear in Attended column when selected in the mobile app.
17. Other Attendees are added in the mobile app meeting task and relate to external attendees e.g. supplier reps etc.

LocationType
 Local **3a** Customer Site

Customer
 Bobby Mail

Work site
 New Building

Job No
 8923

Project/Description

3a. When Location type Customer Site is selected, fields will show allowing you to choose the required customer, worksite & job no.

17. Other Attendees:
 - a. Click to edit or to **+ADD OTHER** add any new ones.
 - b. Change any details or select details. as required.
 - c. Untick Send Minutes if this person does not required a copy of the minutes.
 - d. Click **Save**.

Other Attendees

First N...	Last N...	Company	Email	Send Min...
Mary	Lamb	Overstretched	Heidit@celoces.c...	<input checked="" type="checkbox"/> a <input type="button" value="✎"/>

Edit Item

FirstName **b** LastName

Company Email **c** SendMinutes

d

B. Schedule Regular Meetings

1. Click YES to Schedule Regular Meeting.
2. Click SCHEDULE.
3. Select the Type.
4. Choose the day, month etc. - see below for other options.
5. Select the Start Date, this should be after the date you entered originally.
6. No End date will be unticked, and the End Date will be in 12 months. Change if required.
7. Check the Finish Time.
8. Click **SAVE**.
9. The schedule will now show in the meeting.

In the grid it will only show new meetings for the current month.
 To view scheduled meetings for the next months tick "Show ALL Meetings" – see notes.

Schedule Regular Meeting **1** Yes No

2 Meeting Frequency

3 Type Yearly Monthly Weekly Daily

4 Day

5 StartDateTime NoEnd **6** EndDate **7** FinishTime


8

Schedule Regular Meeting Yes No

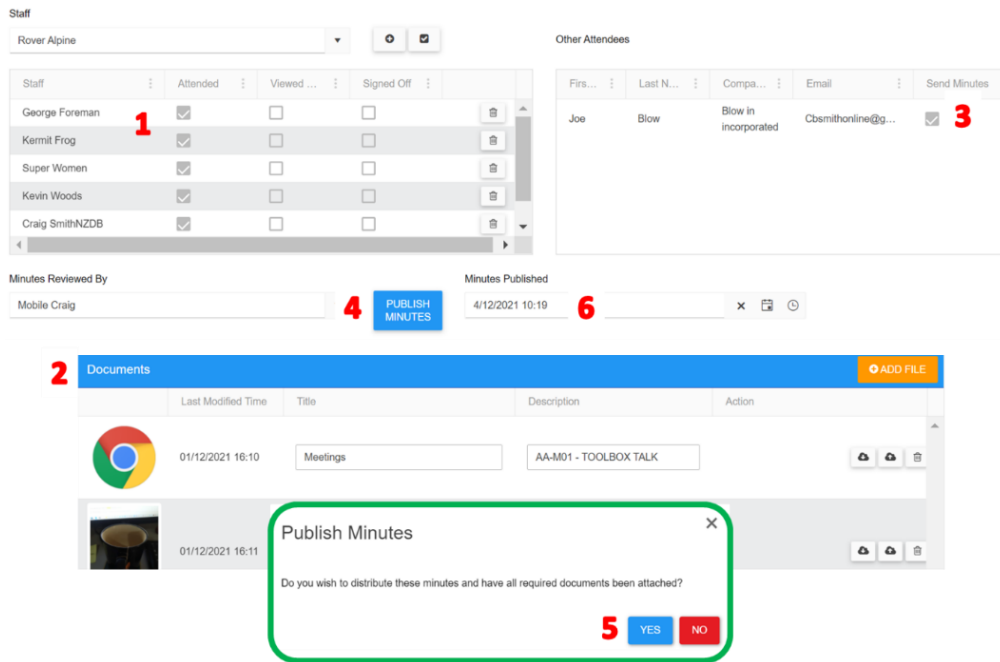
9 Meeting Frequency

C. Publish Minutes

Once the meeting has been completed in the mobile app the Completed & Signed Off boxes will be ticked as per above. Use the [search box, Filters and Groups](#) to narrow down what is displayed.

Re-open the task in the web app by double clicking the line or click  to edit.

1. Those who were marked as attended in the mobile app will now have a tick in the Attended column.
2. Documents will now have the minutes form completed on the mobile app, along with any other files added before or during the meeting. Click **+ADD NEW** if you need to include any other documents.
3. Details for Other Attendees will show on the right side double click to open and edit if required – see #15 above. The Send Minutes box will be ticked as a default. Untick if you are not required send this person the minutes.
4. Click **PUBLISH MINUTES**
5. Click **YES** to distribute the minutes.
6. The Minutes Published will now be populated, scroll back to the top and click **SAVE**.



The screenshot shows the 'Publish Minutes' interface. It includes a 'Staff' table with columns for 'Staff', 'Attended', 'Viewed', and 'Signed Off'. The 'Other Attendees' table has columns for 'Firs...', 'Last N...', 'Compa...', 'Email', and 'Send Minutes'. Below these are fields for 'Minutes Reviewed By' and 'Minutes Published'. A 'Documents' section is also visible, showing a list of documents with a 'Publish Minutes' dialog box overlaid on top. The dialog box asks 'Do you wish to distribute these minutes and have all required documents been attached?' with 'YES' and 'NO' buttons.

For the presenter there will be a Meeting Task to complete & signed off in the Mobile App in [Registers/Meetings](#). Staff selected in Attendees will only see a Meeting Reminder.

NOTES:

- Meeting Types are created and edited in [Administration/Company Set up/Meeting Type](#).
- Meeting Templates will only show forms where Type = Meetings and Status = Locked.
- When **PUBLISH MINUTES** has been completed, then Staff will receive a task on the [mobile app](#) to sign them off. Other Attendees will receive an email with all the documents attached.
- Once **ALL** Staff have signed off the minutes in the mobile app, the signed off column will be populated on the grid.
- Contact support@safetyminder.co for a list of widgets that can be used in template forms for meetings.

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Title	Meeting Type	Scheduled Date...	Location / Worksite	Presenter	Actual Date & Time	Completed	Published	Signed Off
HT Issue 10370	Safety	30/08/2022 11:50	Local: Meeting Room 2	Penolpe Pink	30/08/2022 11:57	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
test 10370	Safety	30/08/2022 02:17	Local: Rear Shed	SM FullAdmin	30/08/2022 02:20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

