Seven Minute Safety Trainer Guide

Mobile App Guide

This quick-start guide will help you start using the Seven Minute Safety Trainer Mobile App. If you have any trouble or any questions that are not answered in this document, please contact technical support at techsupport@blr.com.

For assistance with using the Seven Minute Safety Trainer website, please refer to the **Seven Minute Safety Trainer Website Guide.**

Some features are only available on the website (not on the mobile app).

Web-only features

1. Edit the Resources tab content.
2. Create trainers and administrators.
3. Import multiple users (trainers and employees).
4. Print training topics and other screens.
5. Upload custom training materials

The main areas that will be covered in this guide are:

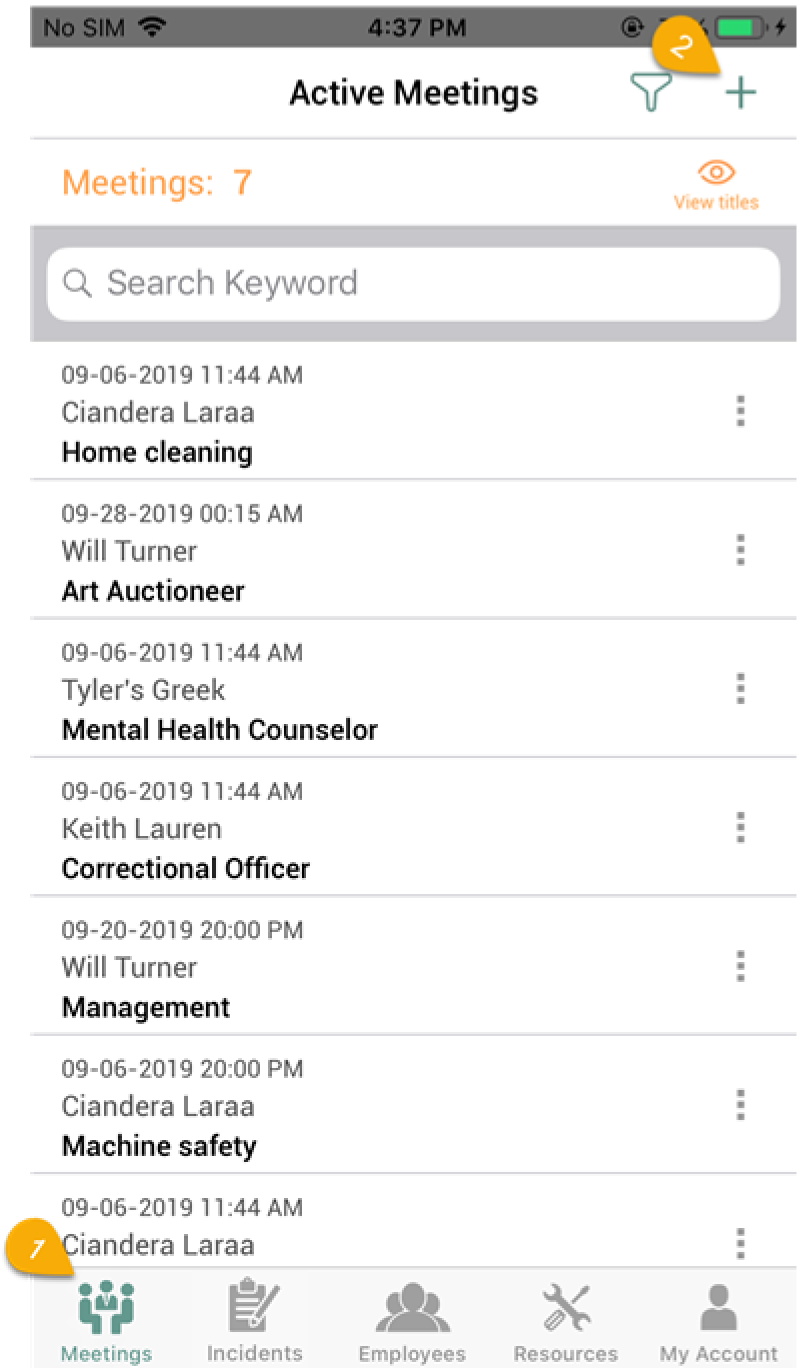
iOS Devices

Meetings

Create New Meeting

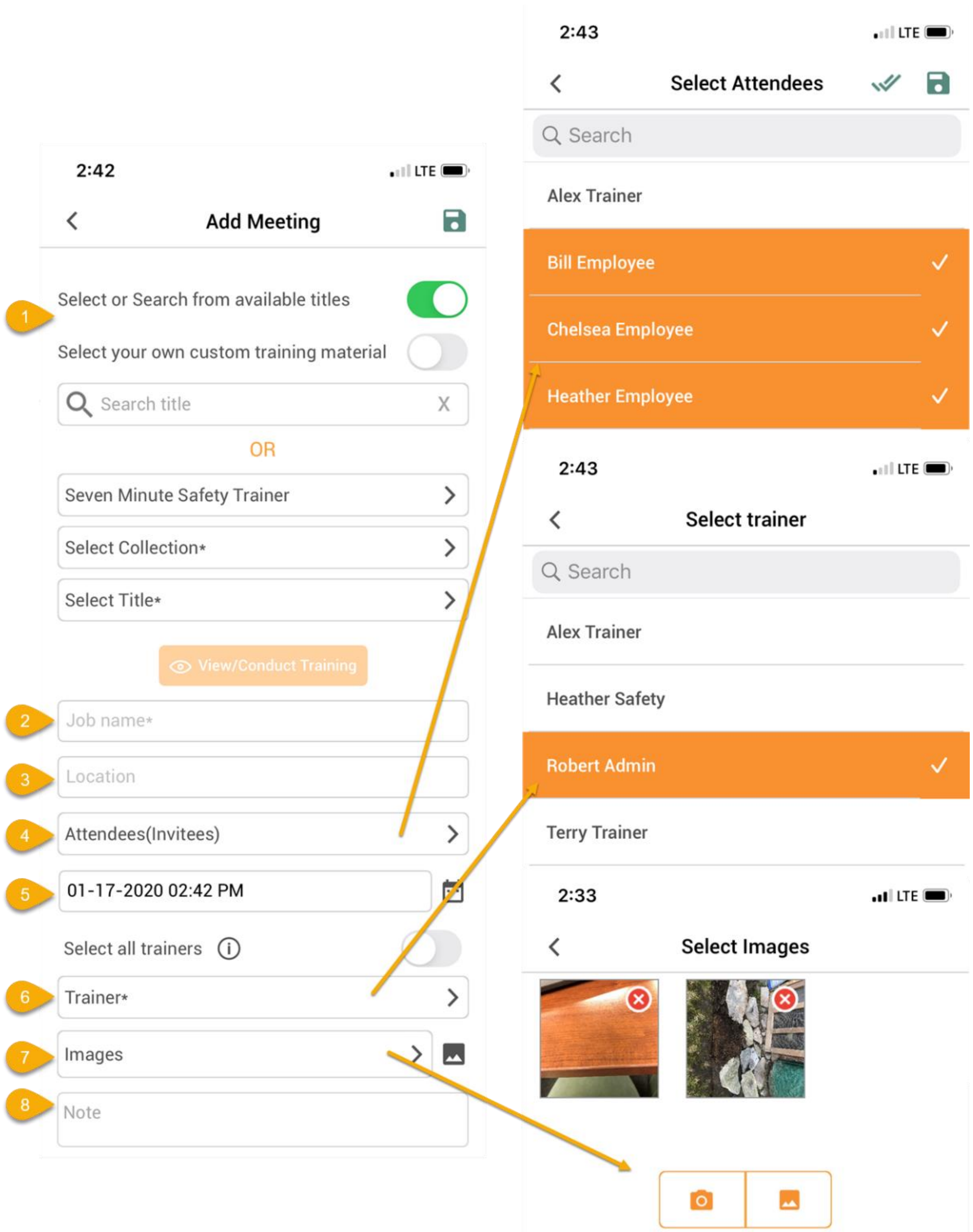
To create a new meeting:

1. Click the **Meetings tab** at the bottom of the screen.
2. Click the **+ sign** at the top right-hand corner of the screen.



Within the **Add Meeting screen**, fill out the following information:

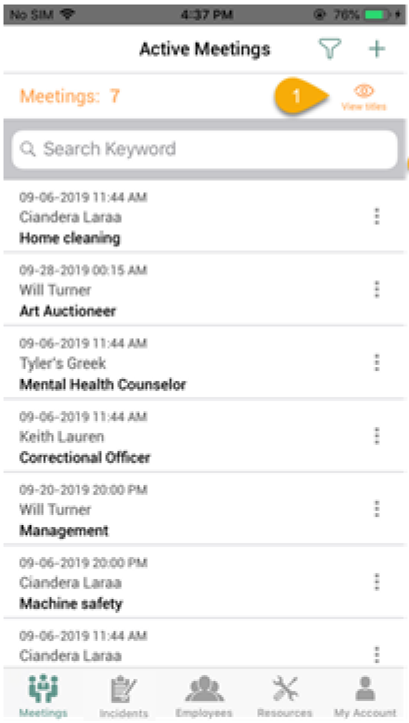
1. Search or select a title using the **Select or Search from available titles. Search** for titles by entering a keyword or **Select** a title by selecting a **Collection and Title** within the drop-down options. To create a meeting with your own materials, select **Select your own custom training material,** and select a training from a list of your uploaded materials.
2. Enter in a **job name** for your meeting.
3. Enter the **meeting location**.
4. **Add attendees** to your meeting by clicking the Attendees field and selecting the people you want to attend the meeting. (Select and Deselect names to add and remove attendees.)
5. **Select the date and time** of your meeting.
6. **Add a trainer(s)** to conduct the meeting, by clicking the trainer field and selecting a trainer. You are able to select 1 trainer or all trainers for any meeting. **Note:** If there are attendees assigned to a trainer, those attendees will automatically populate within the Attendee's field, when you select that trainer.
7. Attach any **images** related to your meeting. You can take a picture or add existing pictures from your phone's photo gallery.
8. Add any **notes** related to your meeting.
9. Click **Save**

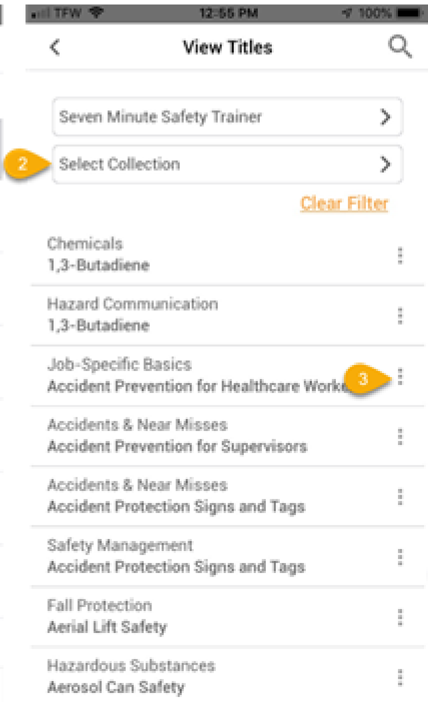


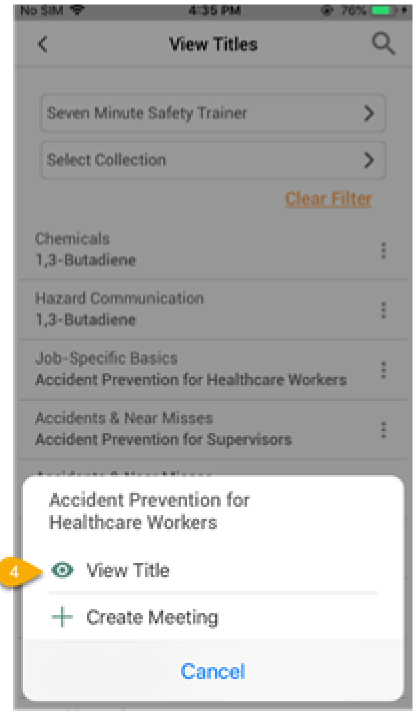
View Titles

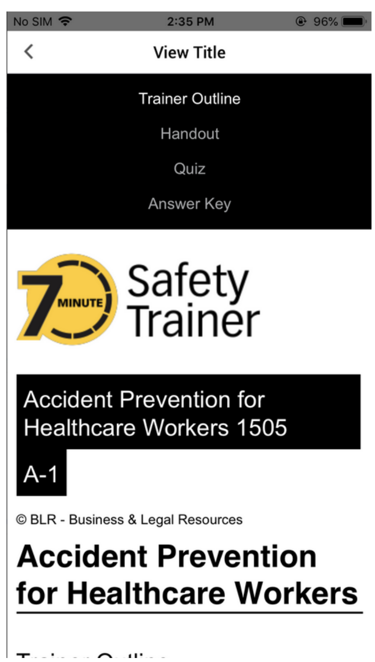
View a list of Seven Minute Safety Trainer titles within the Meetings screen.

1. Click **View Titles**
2. Select a **Collection** from the drop-down option.
3. Click the **three dots** on the right-hand side of the title you are interested in.
4. Click **View Title** within the popup at the bottom of the screen.
   (You also have the option to **Create a meeting** within this popup, by clicking Create Meeting).









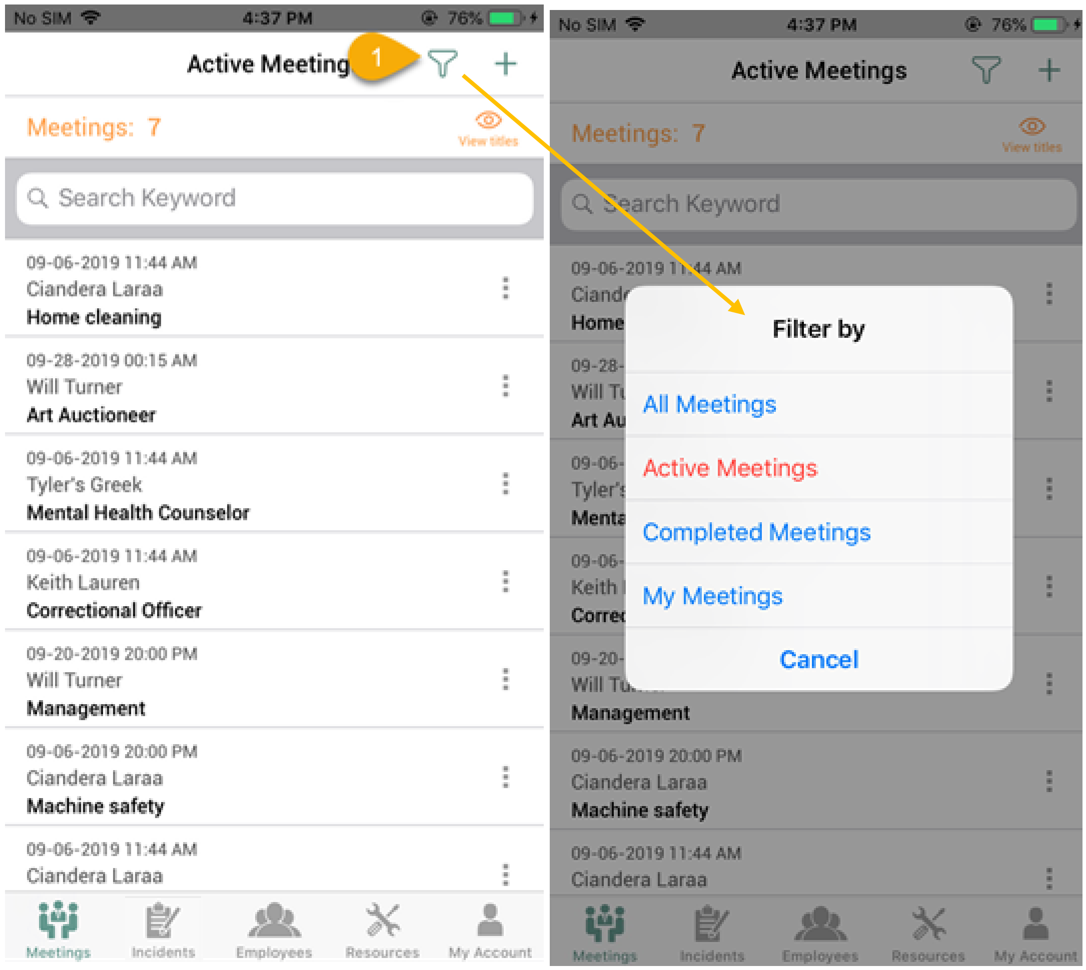
Search and Manage Meetings

Browse a list of meetings, search for a specific meeting, or view and edit meeting details from the Meetings screen.

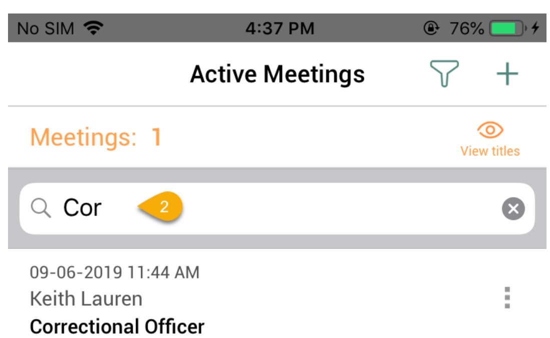
Searching for a meeting

1. Click the **filter icon** at the top right-hand corner of the Meetings screen.

A Filter By popup will appear, where it will allow you to select why kind of meeting you want to show:
All Meetings—Displays all meetings (complete and incomplete).
Active Meetings—Displays active, incomplete meetings.
Completed Meetings – Displays meetings that have been set to "Complete".
My Meetings—Displays meetings assigned to you as the trainer.



2. You can also type a **keyword** in the Search Keyword field. As you type your keyword, meeting with that keyword will appear in the results.



Selecting and managing meetings

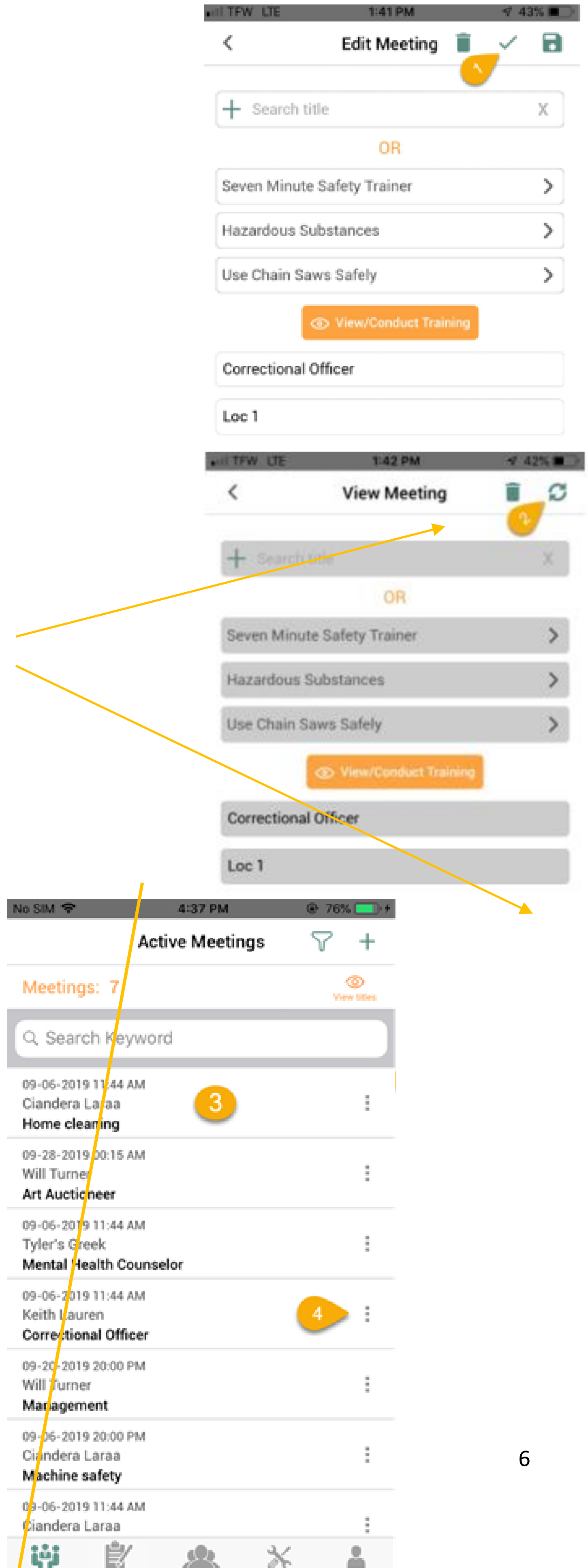
3. Click on the **title of the meeting** to open the meeting detail.

   Within the meeting detail, you can edit the meeting information, as long as the meeting is active (not completed).
   1. To **Complete** a meeting, click into the Meeting Detail and click the check mark at the top right-hand corner of the screen.
   2. To **Reactivate** a completed meeting, click the Reactivate icon at the top right-hand corner of the screen.

4. Click the **three dots** on the right-hand side of the title you are interested in.

   Click **Download PDF** to create a meeting summary that will download to your device and can be emailed. The summary includes all of the meeting details as well as the trainer outline of the selected title.

   Click **Copy Meeting** to create a copy of the selected meeting. Once copied, you can edit any of the new meeting's details.



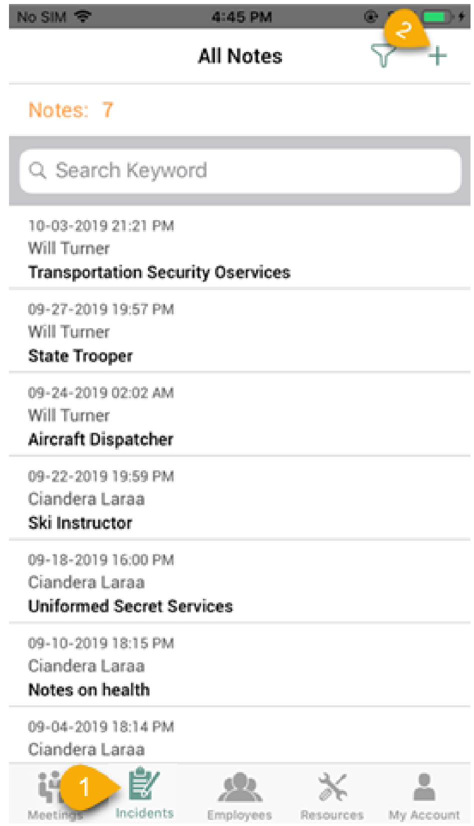
Incidents

Create New Incident

To create a new incident:

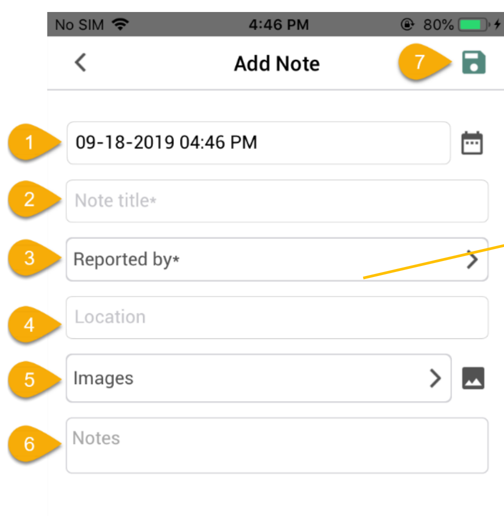
1. Click the **Incidents screen** within the menu at the bottom of the screen.

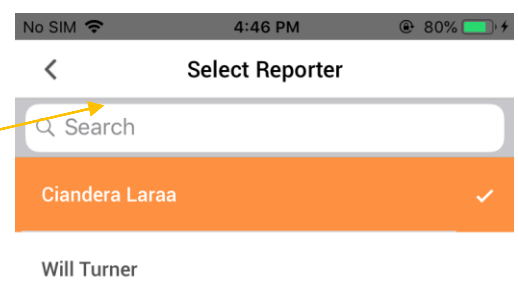
2. Click the **plus sign (+)** at the top of the All Incidents screen.



Within the Add Incident screen:

1. Select the **date your incident** is being recorded.
2. Enter the **Incident Title**.
3. Select the person that incident is being **reported by.**
4. Write the **location** related to your incident.
5. **Add an image** from your mobile devices photo gallery or take a picture to attach to the incident.
6. Add your **incident details**.
7. Click the **Save** icon to save your incident.



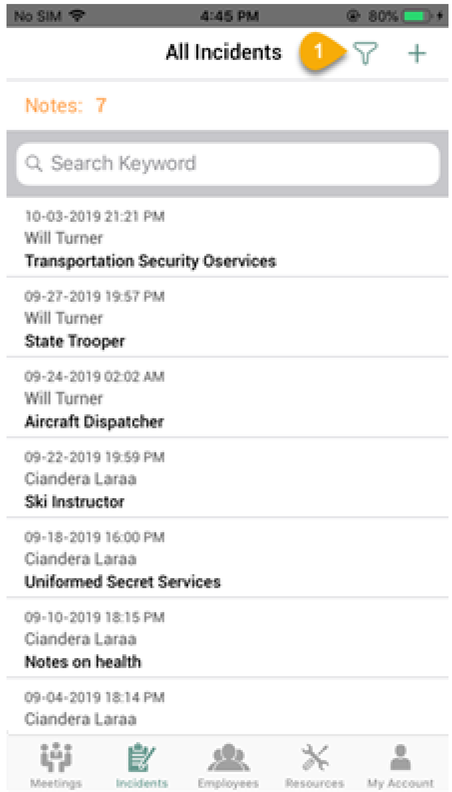


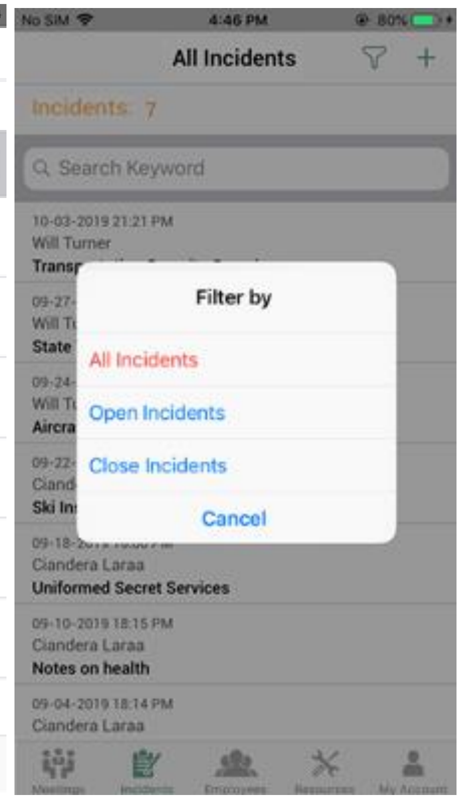
Search / Browse Incidents

There are a few ways to search and browse incidents.

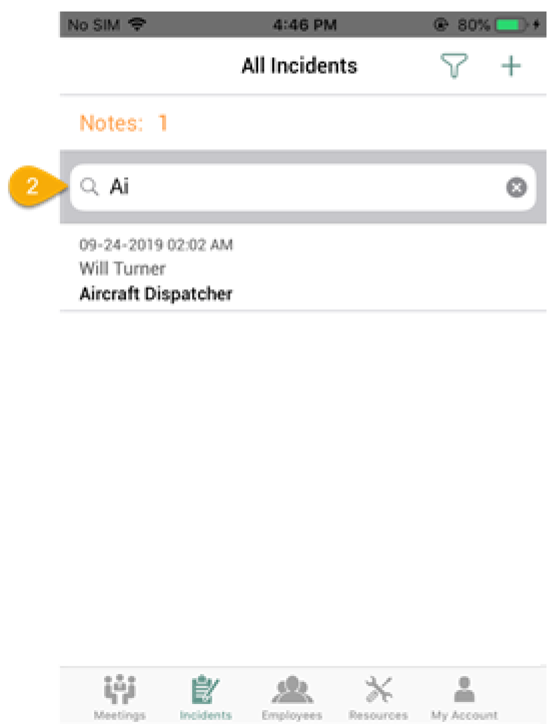
1. To look at incidents with a certain status, click the **filter icon** at the top right-hand corner of the screen.

   You will be able to filter by:
   All incidents – All incidents created, including active and archived.
   Open Incidents – Incidents that have an open status.
   Close Incidents – Incidents that have been archived.





2. You can also search for incidents by entering a **keyword**. Your results will reflect what is written in the keyword field.



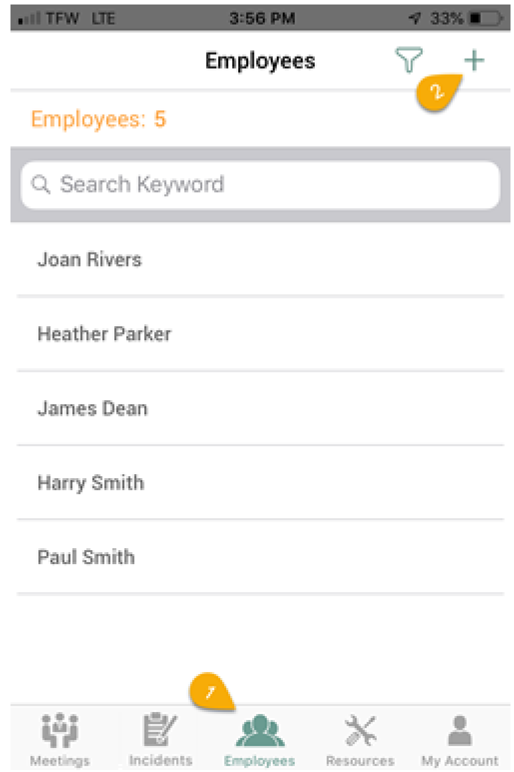
Employees

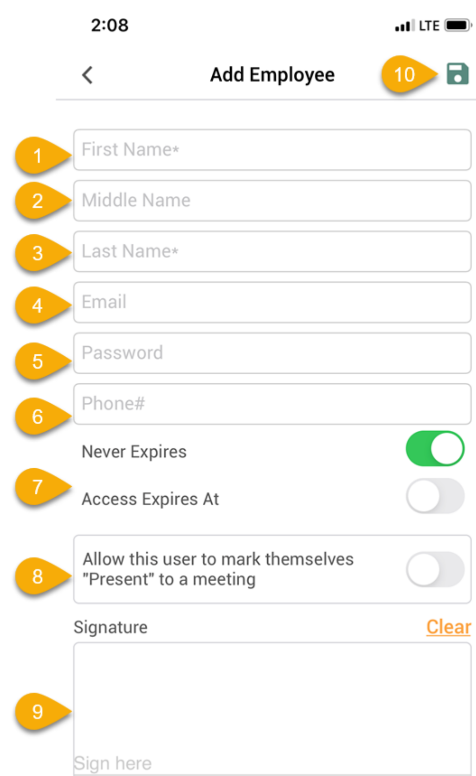
Create New Employee

To create a new employee:

1. Click the **Employees screen** within the menu at the bottom of the screen.

2. Click the **plus sign (+)** at the top of the Employees screen.





Within the Add Employee screen, enter the following information:

1. Employee's **first name** (required).
2. Employee's **middle name**.
3. Employee's **last name** (required).
4. Employee's **e-mail address** (required if employee will be signing in).
5. A **password** (required if the employee will be signing in).
6. Employee's **phone number**.
7. Employee's expiration date.
    - To You can click **Never Expire** to allow
    - To set an expiration date, click **Access Expires At** and select a date of expiration.
8. As an Owner, Admin or Trainer, when adding an Employee, you have the ability to restrict or allow the employee to mark themselves as "**Present**" to a meeting.
9. Employees can add a **signature** that will appear beside their name on the meeting summary PDF when they are marked as having attended a meeting.
10. Click **Save**

Note: Trainers and administrators can only be created from the website.

Search / Browse Employees

There are a few ways to search and browse employees.

1. To search for employees with certain criteria, click the **filter icon** at the top right-hand corner of the screen.

   Within the Filter Employees screen, you will be able to filter by:

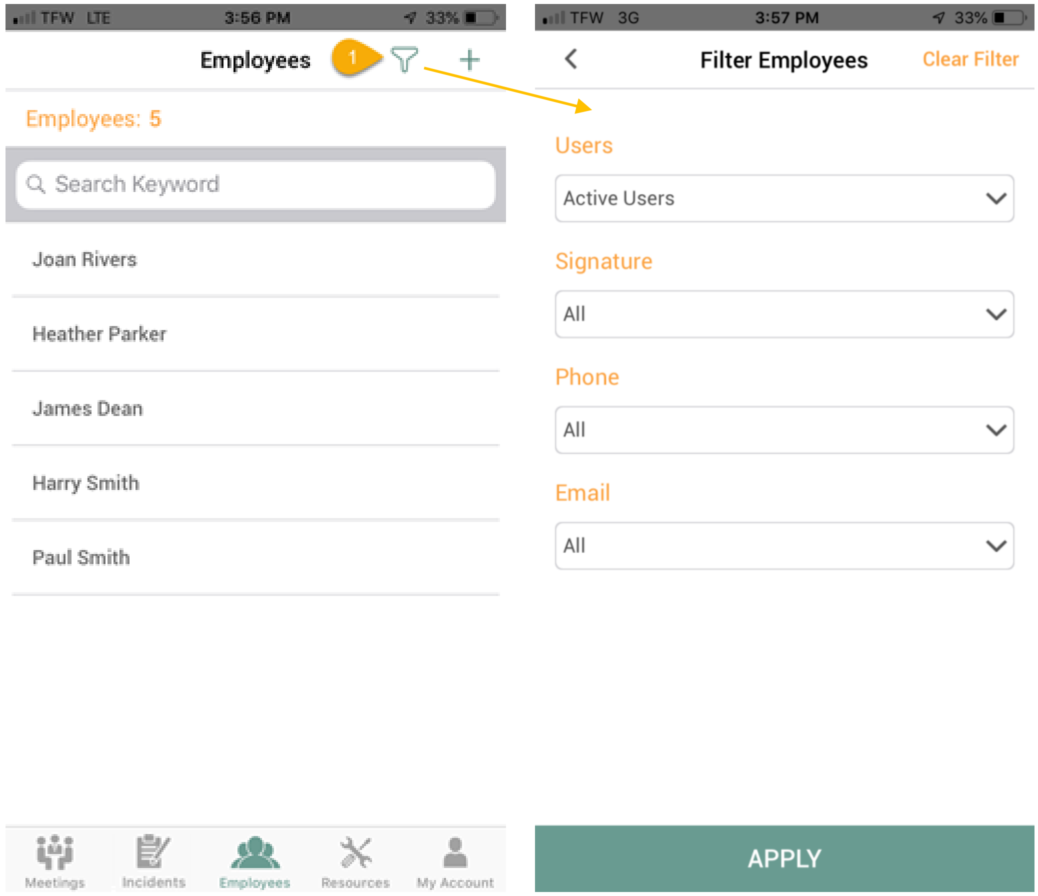
   Users – Show employees that are active or inactive.

   Signature – Show employees with a signature or without a signature on file.

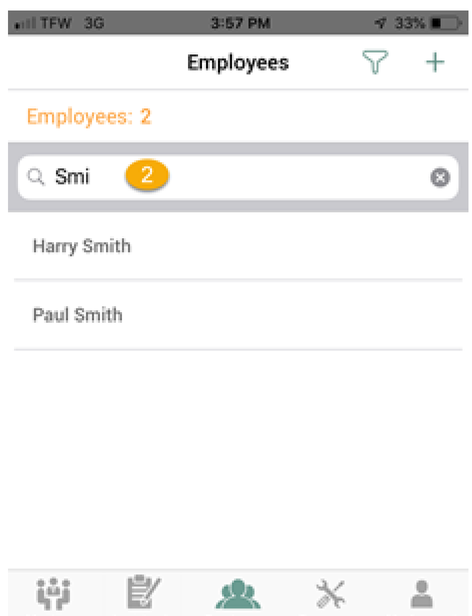
   Phone – Show employees with a phone number or without a phone number on file.

   Email – Show employees with an email or without an email on file.

   After selecting your filter(s), click **APPLY**.



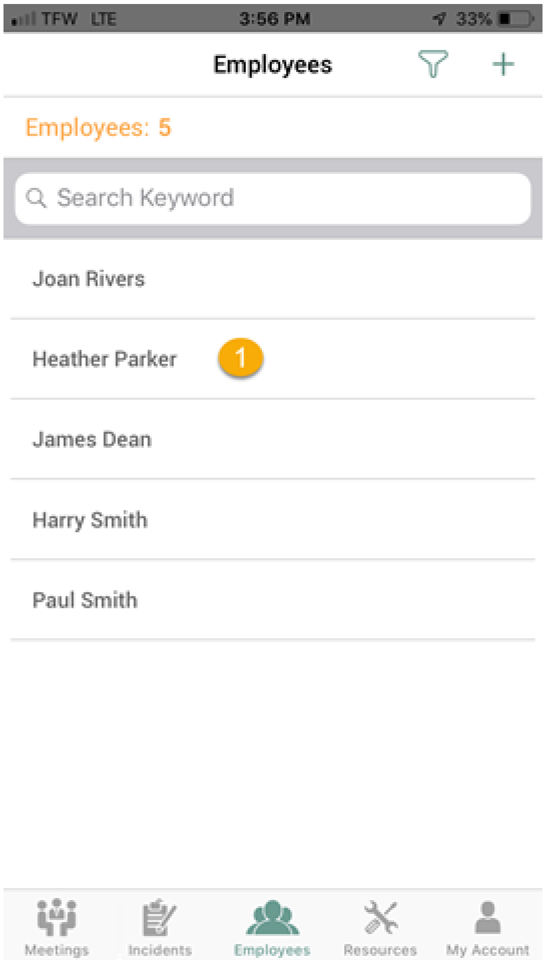
2. You can also search for employees by entering an **employee name**, within the search field. Your results will reflect what is written in the search field.

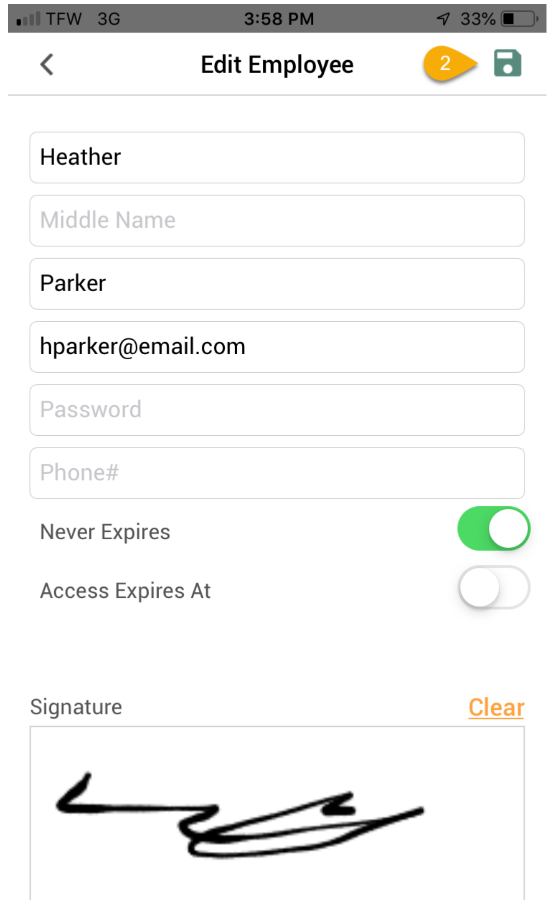


Edit Employee’s Profile

If you need to add/edit an employee’s profile information:

1. **Click on the Employee’s Name**, within the Employees screen.
2. Add/Remove any necessary information and/or employee signature and click **Save.**



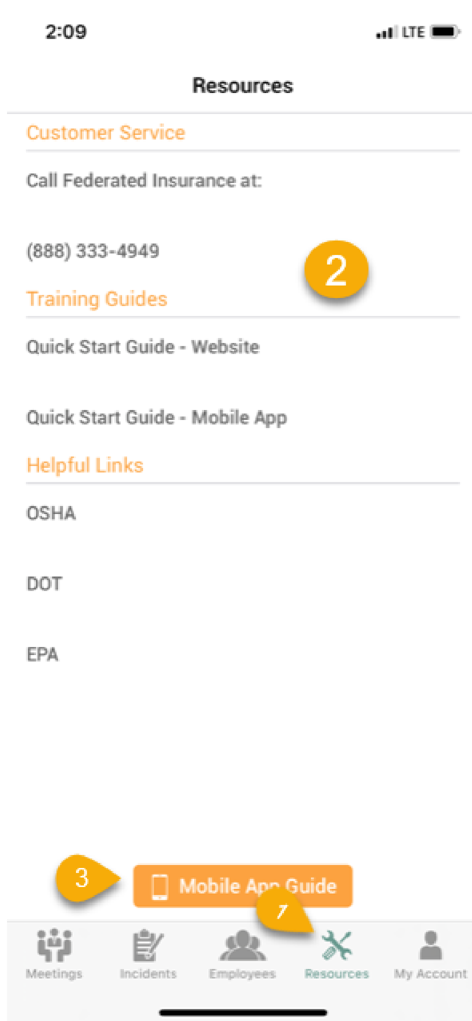


Resources

The Resources tab is completely customizable by the account administrators and will display whatever information they choose.

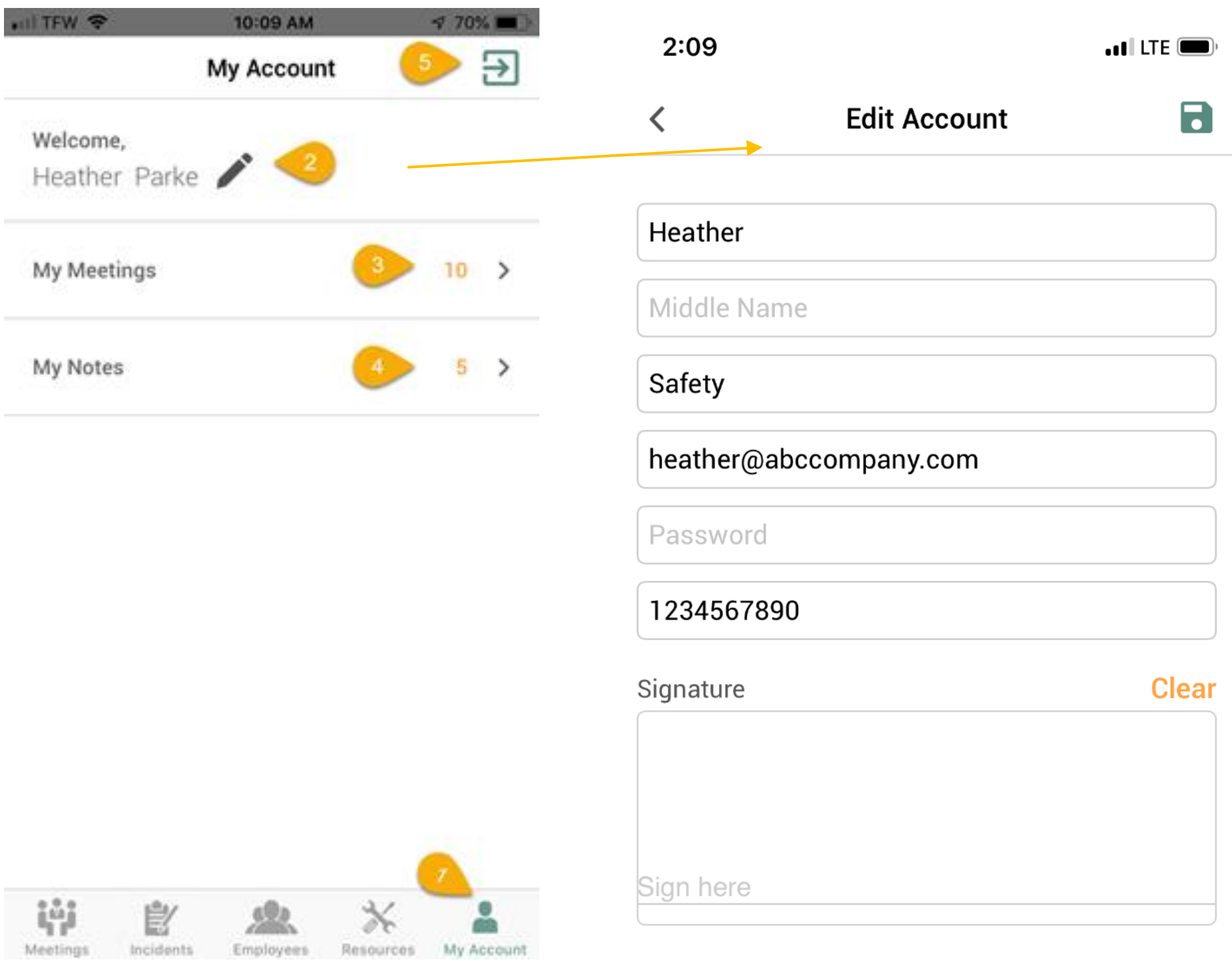
Note: The Resources tab can only be edited from the website by an administrator or account owner.

1. To view the resources your administrator or owner added, **click the resources icon** at the bottom of the screen.
2. Within the **Resources screen**, you will have access to phone numbers, training guides, and helpful links.
3. To view this **Mobile App Guide**, click the Mobile App Guide button at the bottom of the screen.



My Account

1. Click the **My Account icon** at the bottom of the screen to access your account information.
2. Within the My Account screen, you will see your name and a pencil icon. **Click on the pencil icon** to edit your account information.
    1. Click the **Save** icon to save any changes you may have made to your profile.
3. The number of meetings assigned to you as the trainer (administrators see all meetings) will be displayed on the **My Meetings** line. Click to view your meetings.
4. The number of incidents assigned to you (administrators see all incidents) will be displayed on the **My Incidents** line. Click to view your incidents.
5. Click the **logout** icon to log out of the app.



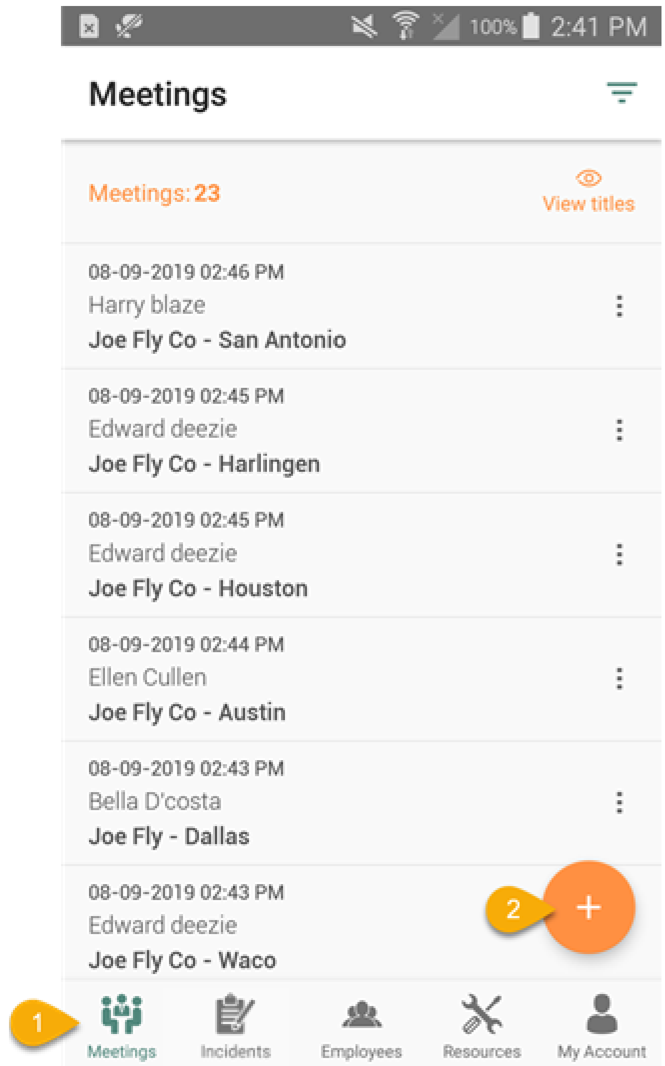
Android Devices

Meetings

Create New Meeting

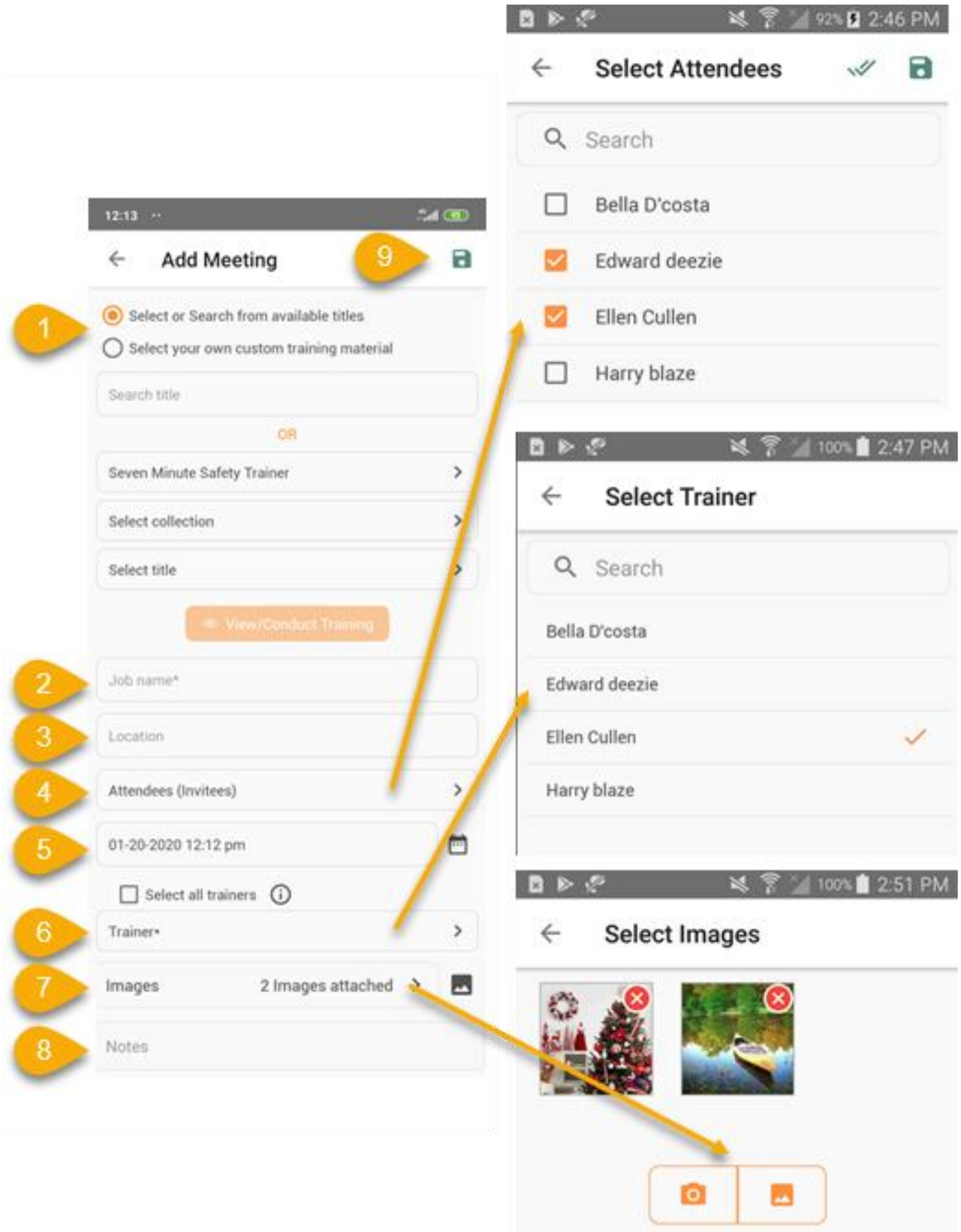
To create a new meeting:

1. Click the **Meetings** tab at the bottom of the screen.
2. Click the **+ sign** at the bottom right-hand corner of the screen.



Within the Add Meeting screen, fill out the following information.

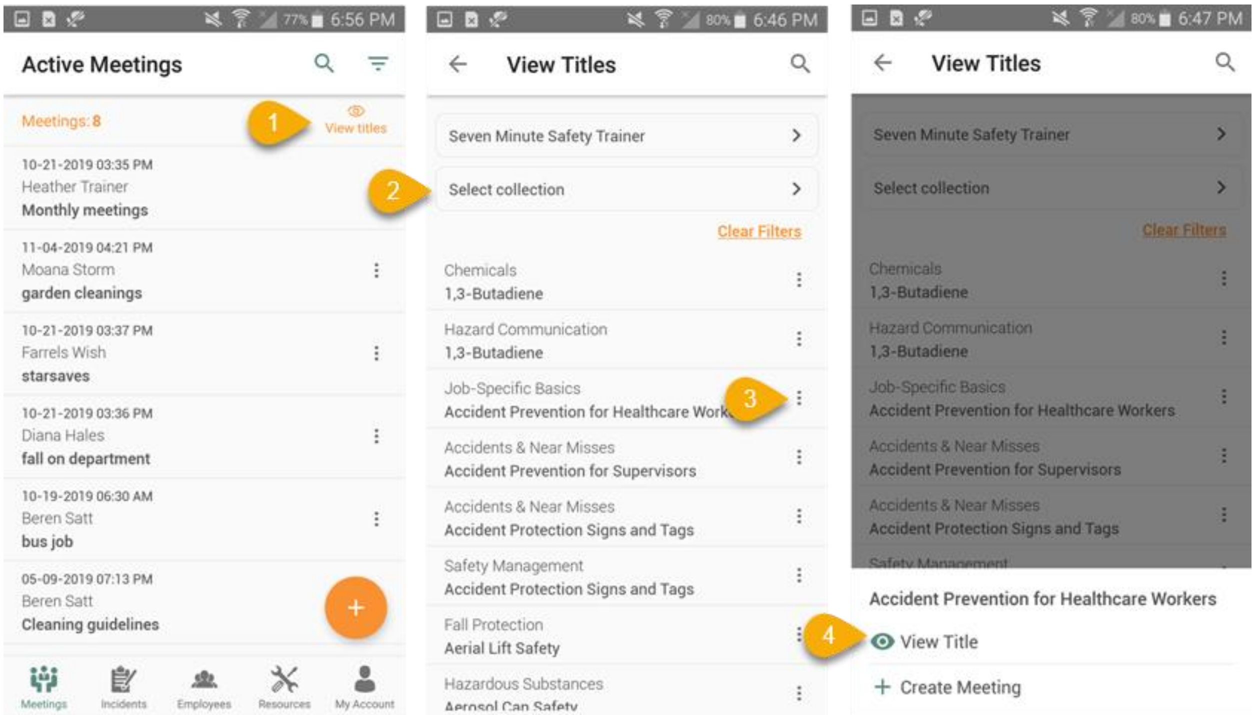
1. Search or select a title using the **Select or Search from available titles. Search** for titles by entering a keyword or **Select** a title by selecting a **Collection and Title** within the drop-down options. To create a meeting with your own materials, select **Select your own custom training material,** and select a training from a list of your uploaded materials.
2. Enter in a **job name** for your meeting.
3. Enter the **meeting location**.
4. **Add attendees** to your meeting by clicking the Attendees field and selecting the people you want to attend the meeting. (Select and Deselect names to add and remove attendees.)
5. **Select the date and time** of your meeting.
6. **Add a trainer(s)** to conduct the meeting, by clicking the trainer field and selecting a trainer. You are able to select 1 trainer or all trainers for any meeting. **Note:** If there are attendees assigned to a trainer, those attendees will automatically populate within the Attendee's field, when you select that trainer.
7. Attach any **images** related to your meeting. You can take a picture or add existing pictures from your phone's photo gallery.
8. Add any **notes** related to your meeting.
9. Click **Save**

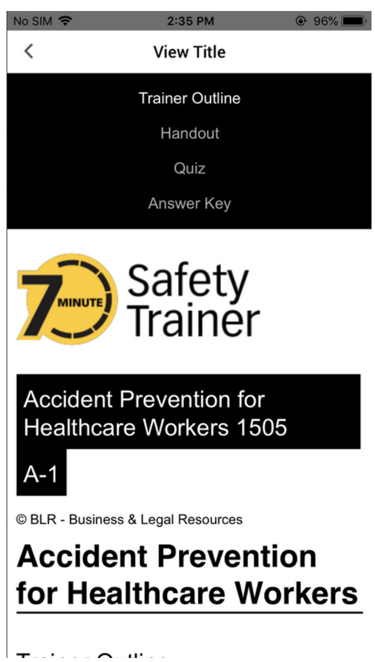


View Titles

View a list of Seven Minute Safety Trainer titles within the Meetings screen.

1. Click **View Titles**
2. Select a **Collection** from the drop-down option.
3. Click the **three dots** on the right-hand side of the title you are interested in.
4. Click **View Title** within the popup at the bottom of the screen.
   (You also have the option to Create a meeting within this popup, by clicking Create Meeting).





Search and Manage Meetings

Browse a list of meetings, search for a specific meeting, or view and edit meeting details from the Meetings screen.

Searching for a meeting

1. Click the **filter icon** at the top right-hand corner of the Meetings screen.

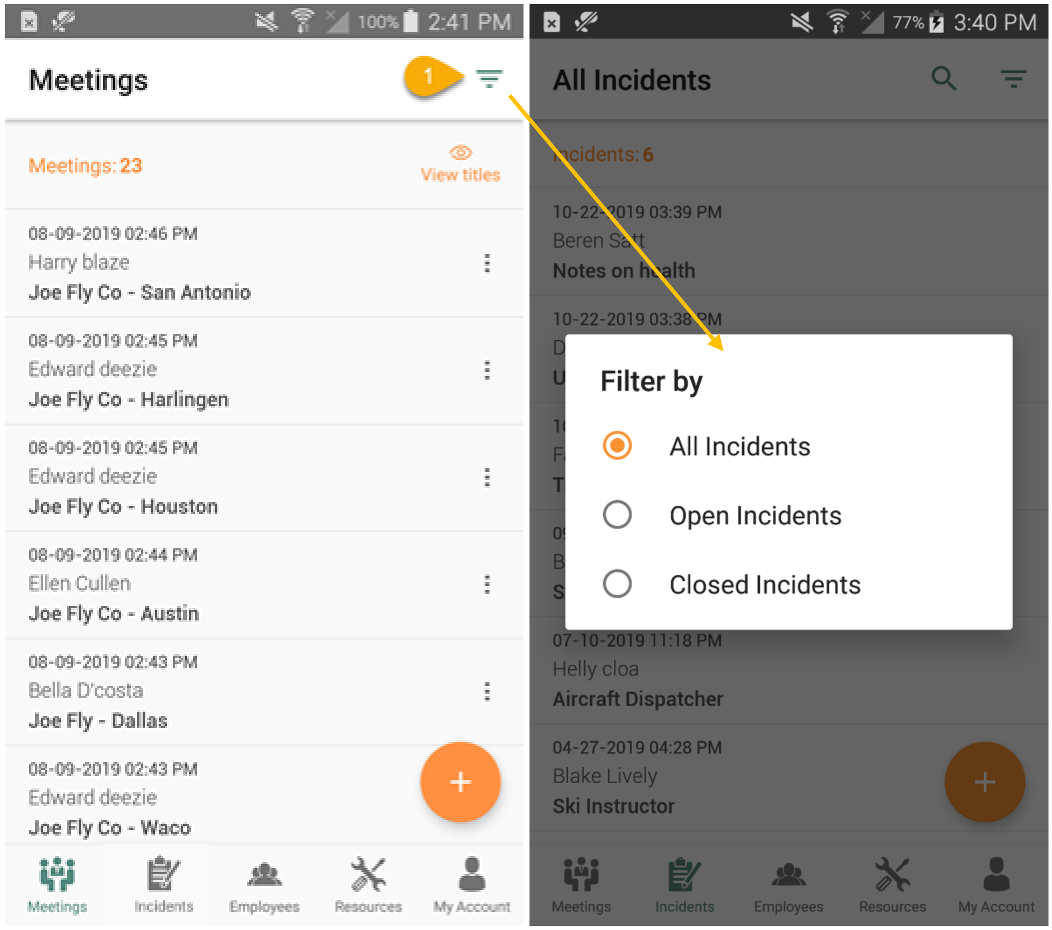
   A Filter By popup will appear, where it will allow you to select why kind of meeting you want to show:

   All Meetings—Displays all meetings (complete and incomplete).

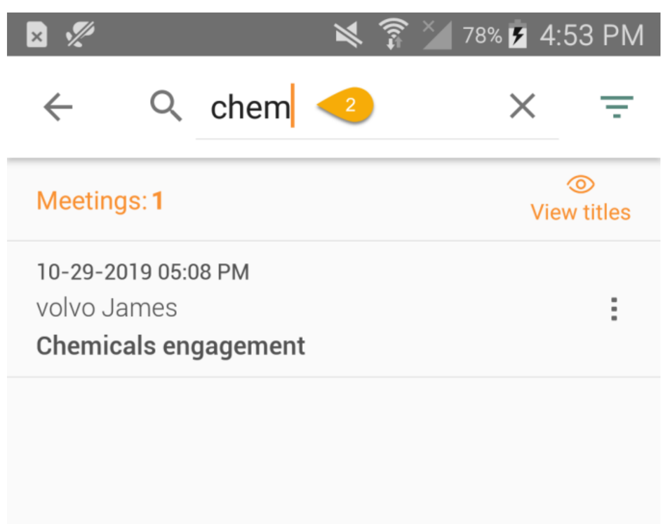
   Active Meetings—Displays active, incomplete meetings.

   Completed Meetings – Displays meetings that have been set to "Complete".

   My Meetings—Displays meetings assigned to you as the trainer.



2. You can also type a keyword in the **Search Keyword field**. As you type your keyword, meeting with that keyword will appear in the results.



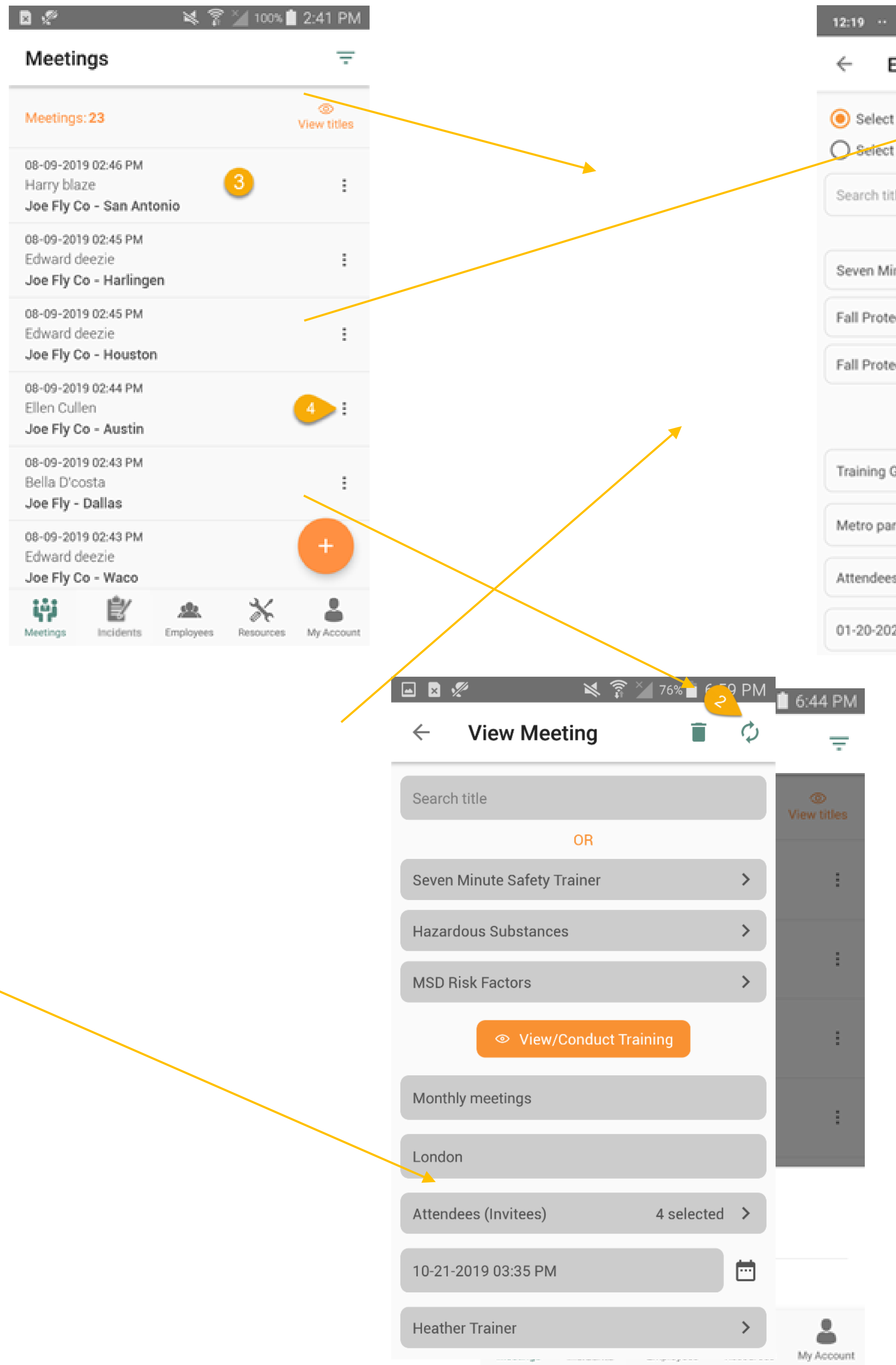
Selecting and managing meetings

3. Click on the **title of the meeting** to open the meeting detail.
   Within the meeting detail, you can edit the meeting information, as long as the meeting is active (not completed).
   1. To **Complete** a meeting, click into the Meeting Detail and click the check mark at the top right-hand corner of the screen.
   2. To **Reactivate** a completed meeting, click the Reactivate icon at the top right-hand corner of the screen.

4. Click the **three dots** on the right-hand side of the title you are interested in.

   Click **Download PDF** to create a meeting summary that will download to your device and can be emailed. The summary includes all of the meeting details as well as the trainer outline of the selected title.

   Click **Copy Meeting** to create a copy of the selected meeting. Once copied, you can edit any of the new meeting's details.



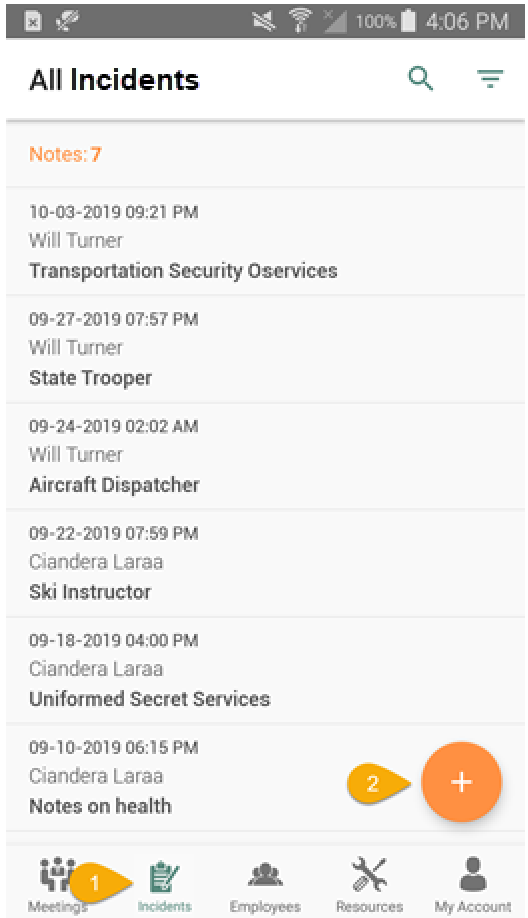
Incidents

Create New Incident

To create a new incident:

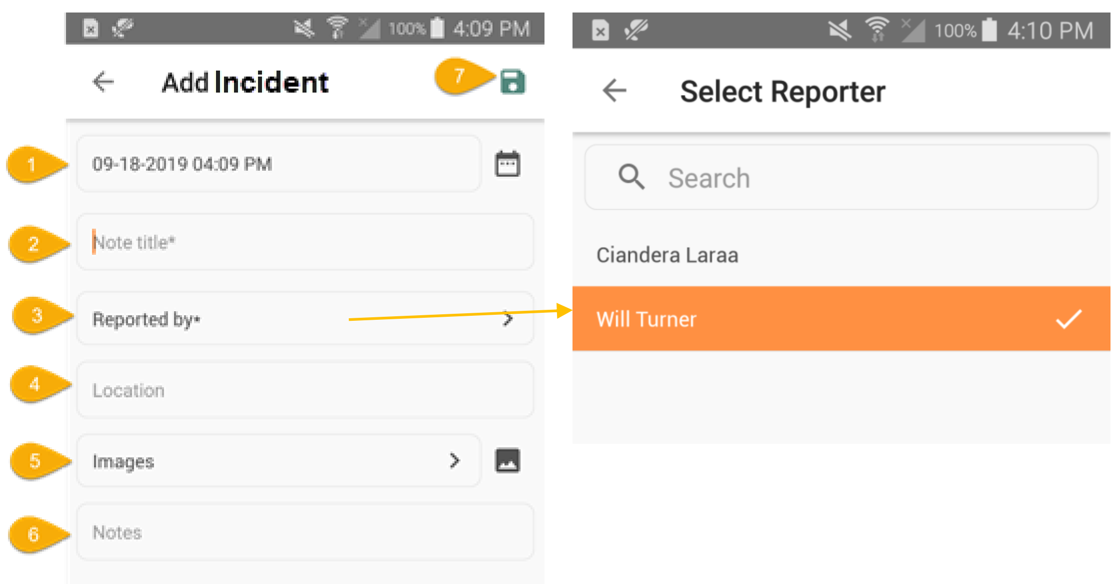
1. Click the **Incidents screen** within the menu at the bottom of the screen.

2. Click the **plus sign (+)** at the top of the All Incidents screen.



Within the Add Incident screen:

1. Select the **date your incident** is being recorded.
2. Enter the **Incident Title**.
3. Select the person that incident is being **reported by.**
4. Write the **location** related to your incident.
5. **Add an image** from your mobile devices photo gallery or take a picture to attach to the incident.
6. Add your **incident details**.
7. Click the **Save** icon to save your incident.



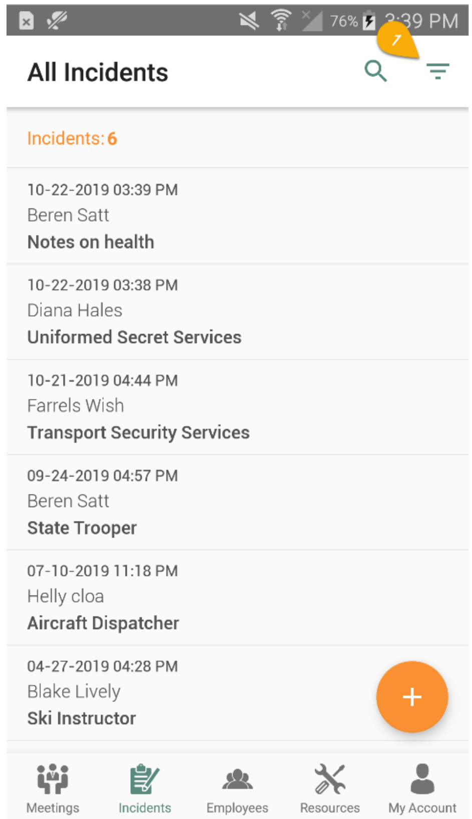
Search / Browse Incidents

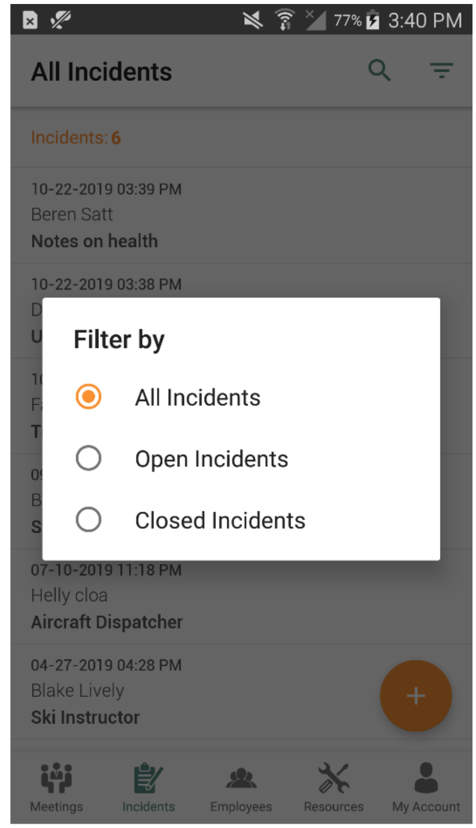
There are a few ways to search and browse incidents.

1. To look at incidents with a certain status, click the **filter icon** at the top right-hand corner of the screen.

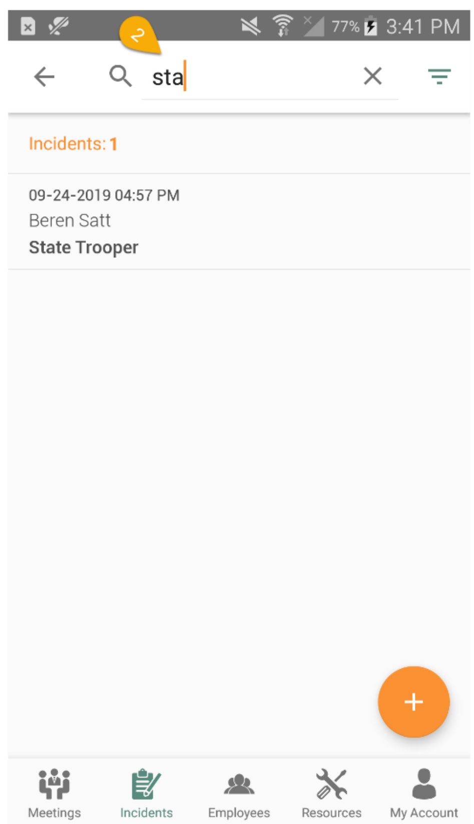
   You will be able to filter by:

   All incidents – All incidents created, including active and archived.
   Current Month's Incidents – Incidents created within the current month.
   Last Month's Incidents – Incidents created in the previous month.





2. You can also search for incidents by entering a **keyword**. Your results will reflect what is written in the keyword field.



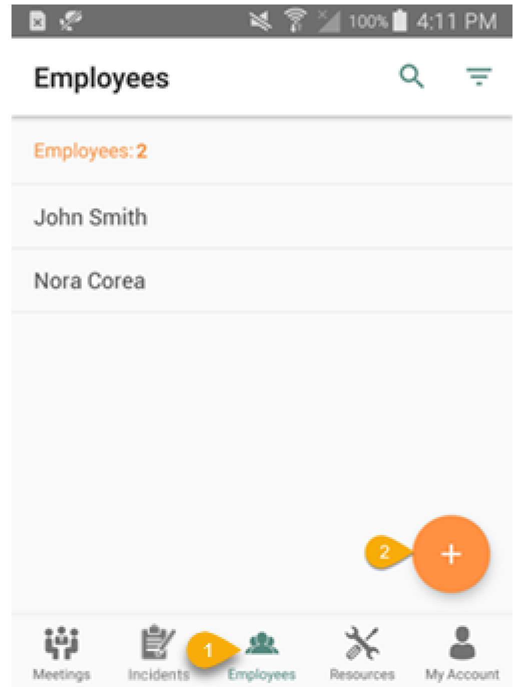
Employees

Create New Employee

To create a new employee:

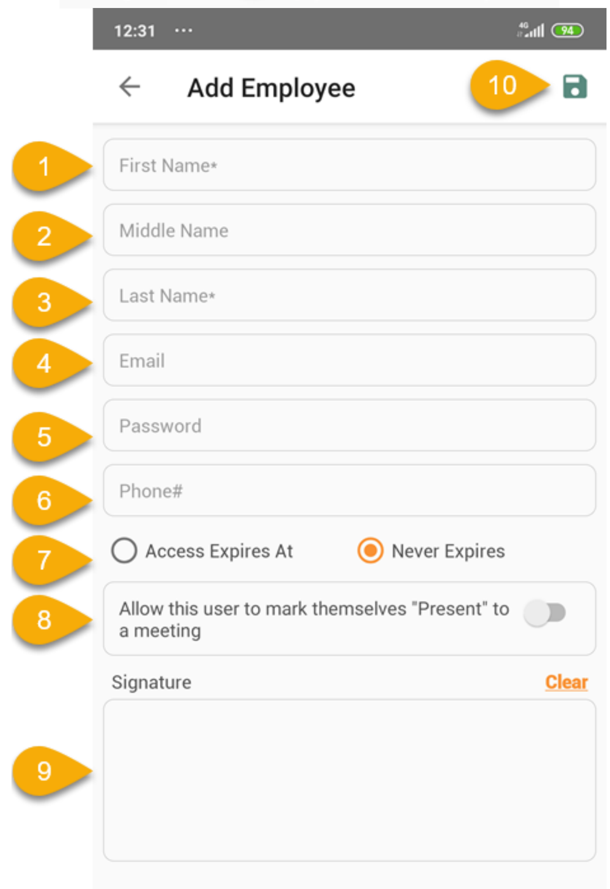
1. Click the **Employees screen** within the menu at the bottom of the screen.

2. Click the **plus sign (+)** at the top of the Employees screen.



Within the Add Employee screen, enter the following information:

1. Employee's **first name** (required).
2. Employee's **middle name**.
3. Employee's **last name** (required).
4. Employee's **e-mail address** (required if employee will be signing in).
5. A **password** (required if the employee will be signing in).
6. Employee's **phone number**.
7. Employee's expiration date.
    - To You can click **Never Expire** to allow
    - To set an expiration date, click **Access Expires At** and select a date of expiration.
8. As an Owner, Admin or Trainer, when adding an Employee, you have the ability to restrict or allow the employee to mark themselves as "**Present**" to a meeting.
9. Employees can add a **signature** that will appear beside their name on the meeting summary PDF when they are marked as having attended a meeting.
10. Click **Save**



Note: Trainers and administrators can only be created from the website.

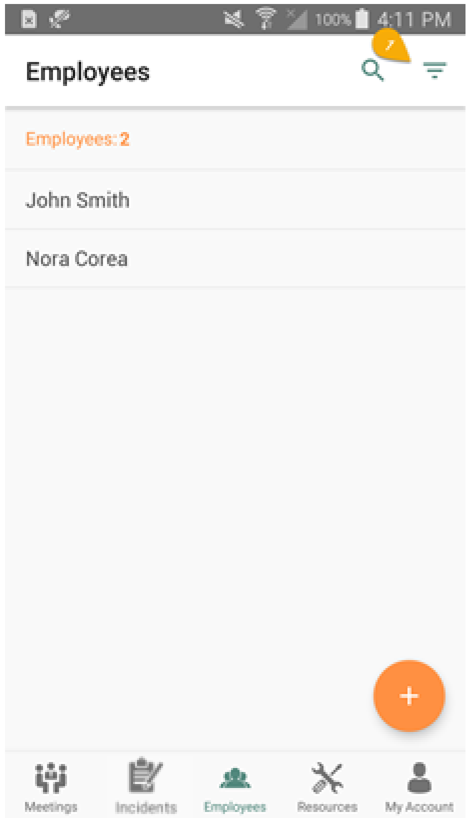
Search / Browse Employees

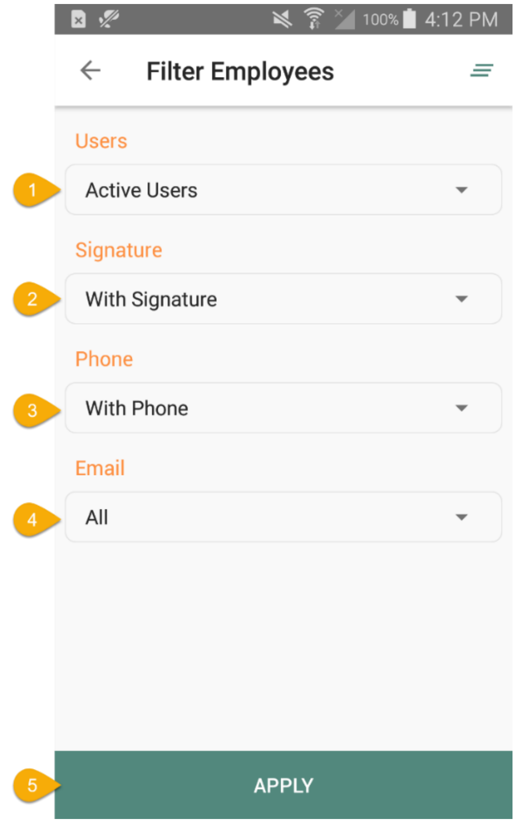
There are a few ways to search and browse employees.

1. To search for employees with certain criteria, click the **filter icon** at the top right-hand corner of the screen.

   Within the Filter Employees screen, you will be able to filter by:

   1. **Users** – Show employees that are active or inactive.
   2. **Signature** – Show employees with a signature or without a signature on file.
   3. **Phone** – Show employees with a phone number or without a phone number on file.
   4. **Email** – Show employees with an email or without an email on file.
   5. After selecting your filter(s), click **APPLY**.

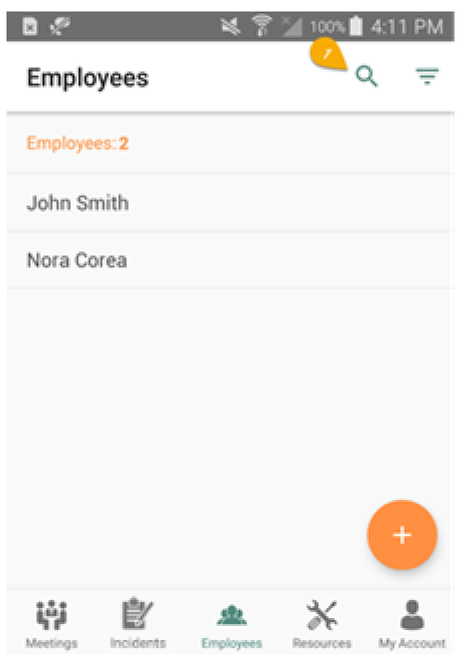


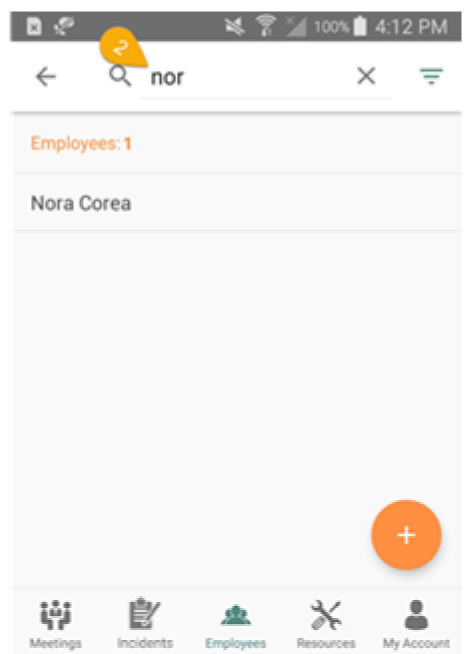


You can also search for employees by entering an **employee name**, within the search field.

1. Click the **magnifying glass icon** to open the search field.

2. Enter the **employee name**. Your results will reflect what is written in the search field.

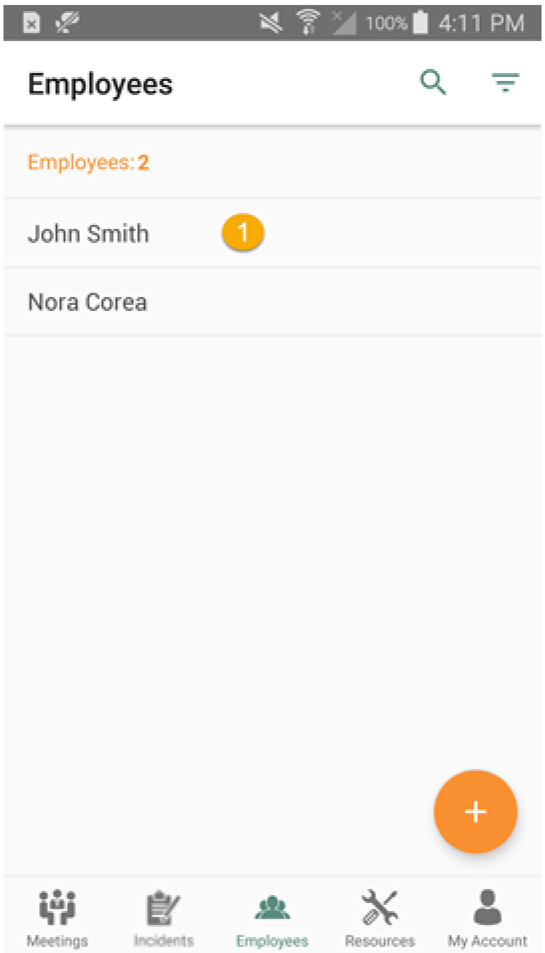


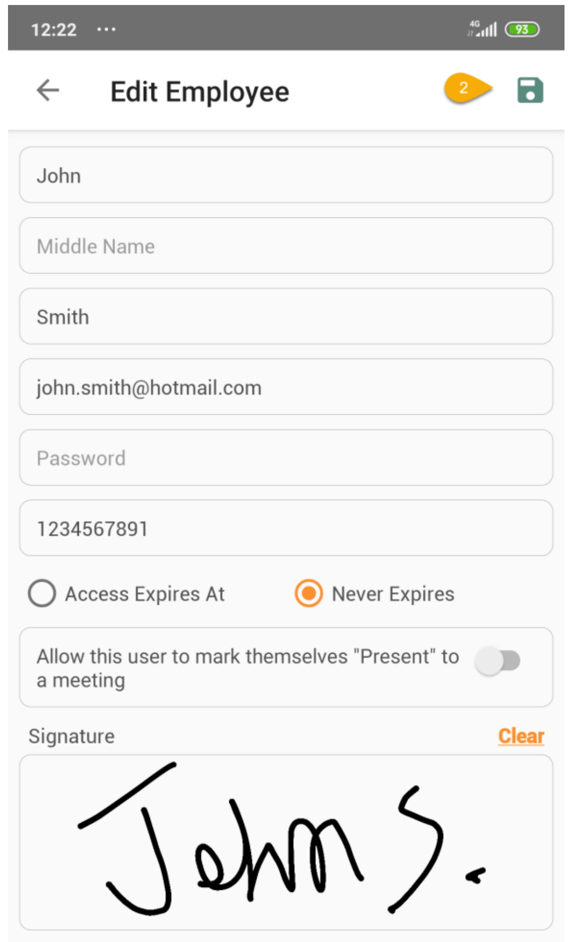


Edit Employee's Profile

If you need to add/edit an employee's profile information:

1. **Click on the Employee's Name**, within the Employees screen.
2. Add/Remove any necessary information and/or employee signature and click **Save.**



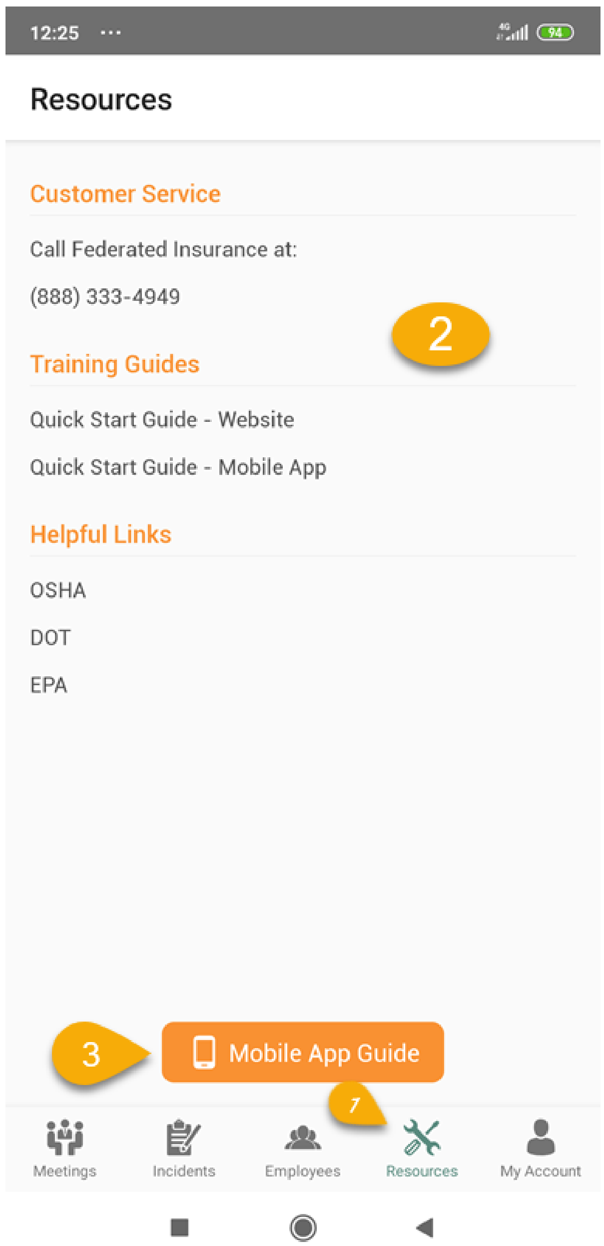


Resources

The Resources tab is completely customizable by the account administrators and will display whatever information they choose.

Note: The Resources tab can only be edited from the website by an administrator or account owner.

1. To view the resources your administrator or owner added, **click the resources icon** at the bottom of the screen.
2. Within the **Resources screen**, you will see sections that your Administrator or Owner created.
3. To view this **Mobile App Guide**, click the Mobile App Guide button at the bottom of the screen.



My Account

1. Click the **My Account icon** at the bottom of the screen to access your account information.
2. Within the My Account screen, you will see your name and a pencil icon. **Click on the pencil icon** to edit your account information.
   - Click the **Save** icon to save any changes you may have made to your profile.
3. The number of meetings assigned to you as the trainer (administrators see all meetings) will be displayed on the **My Meetings** line. Click to view your meetings.
4. The number of incidents assigned to you (administrators see all incidents) will be displayed on the **My Incidents** line. Click to view your incidents.
5. Click the **logout** icon to log out of the app.