

Collaborators Feature Overview

This document provides a step-by-step walkthrough of how to effectively use the collaborators feature. This feature allows multiple team members to simultaneously work on the same document, enabling real-time collaboration and ensuring that your documentation is precise, current, and consistent across all shifts and departments.

Step 1

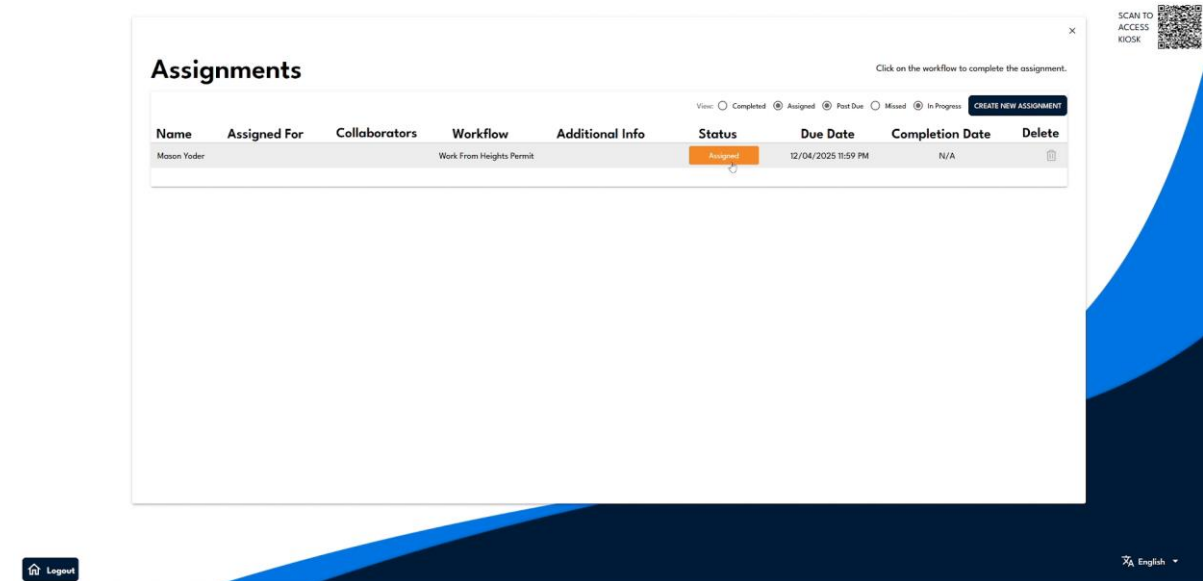
In this video, we highlight the collaborators feature, which allows multiple team members to work on the same document simultaneously. This facilitates faster turnarounds, eliminates bottlenecks, and enables real-time input. Whether it's updating a maintenance checklist or reviewing an incident report, any team member can contribute without having to wait for others to finish.

The screenshot displays the 'Assignments' management interface. At the top, there's a title 'Assignments' and a close button 'X'. Below the title, a instruction reads 'Click on the workflow to complete the assignment.' To the right, there's a QR code with the text 'SCAN TO ACCESS KIOSK'. A filter bar shows 'View:' with radio buttons for 'Completed', 'Assigned' (selected), 'Past Due', 'Missed', and 'In Progress', along with a 'CREATE NEW ASSIGNMENT' button. The main content is a table with the following columns: Name, Assigned For, Collaborators, Workflow, Additional Info, Status, Due Date, Completion Date, and Delete. A single row is shown for 'Mason Yoder' with 'Assigned' status and a due date of '12/04/2025 11:59 PM'. The bottom of the interface includes a 'Logout' button on the left and a language selector 'English' on the right.

Name	Assigned For	Collaborators	Workflow	Additional Info	Status	Due Date	Completion Date	Delete
Mason Yoder			Work From Heights Permit		Assigned	12/04/2025 11:59 PM	N/A	

Step 2

To ensure your documentation is always accurate and up-to-date, you can explore this feature by opening an assignment that has been allocated to you. For instance, you might have a work-from-heights permit assigned to you.



Step 3

Open the assigned form, and you will notice at the bottom that signatures from coworkers who are part of the job are required. Begin by filling out some of the necessary information on the form.

Working From Height Permit

LOCATION: PROJECT NUMBER: DATE:

COMPETENT PERSON(S):

Capable of identifying existing and predictable FALL hazards and has authorization to take prompt corrective measures to eliminate them.

Adequate fall protection is in place for the following trigger height and scenarios.

☒ **Four feet (4')** as specified in the general industry regulations

- standing on portable ladders at or above the threshold height
- ascending or descending portable ladders at or above the threshold height
- standing on supported scaffold platforms, even with a complete platform and guardrail
- standing on a scissor lift platform within a complete guardrail system

☐ Weather conditions have been considered by a competent person prior to any work from height.

Weather Conditions: Temperature:

CONFIRM fall protection system criteria and practices (check only what applies)

Working surfaces that reach the 4ft threshold height for fall protection are protected with:

☐ OSHA compliant ladder or scissor access where the break in elevation is fifteen inches (18") or more

Step 4

Once the form is filled and you have signed your name, but now require a coworker's signature, navigate to the top of the document. Select the 'Add Collaborators' option, where you will see a list of other users to choose from.

RE-ASSIGN REVIEW REQUESTS NEW COLLABORATOR(S)

Working From Height Permit

LOCATION: DATE:

COMPETENT PERSON(S):

Capable of identifying existing and predictable FALL hazards and has authorization to take prompt corrective measures to eliminate them.

Adequate fall protection is in place for the following trigger height and scenarios.

☒ **Four feet (4')** as specified in the general industry regulations

- standing on portable ladders at or above the threshold height
- ascending or descending portable ladders at or above the threshold height
- standing on supported scaffold platforms, even with a complete platform and guardrail
- standing on a scissor lift platform within a complete guardrail system

CONFIRM fall protection system criteria and practices (check only what applies)

Working surfaces that reach the 4ft threshold height for fall protection are protected with:

☐ OSHA compliant ladder or scissor access where the break in elevation is fifteen inches (18") or more

Add Collaborator(s)

Please select all the user(s) you want to add as collaborator(s) to this assignment

ALL ITEMS

SELECTED ITEMS

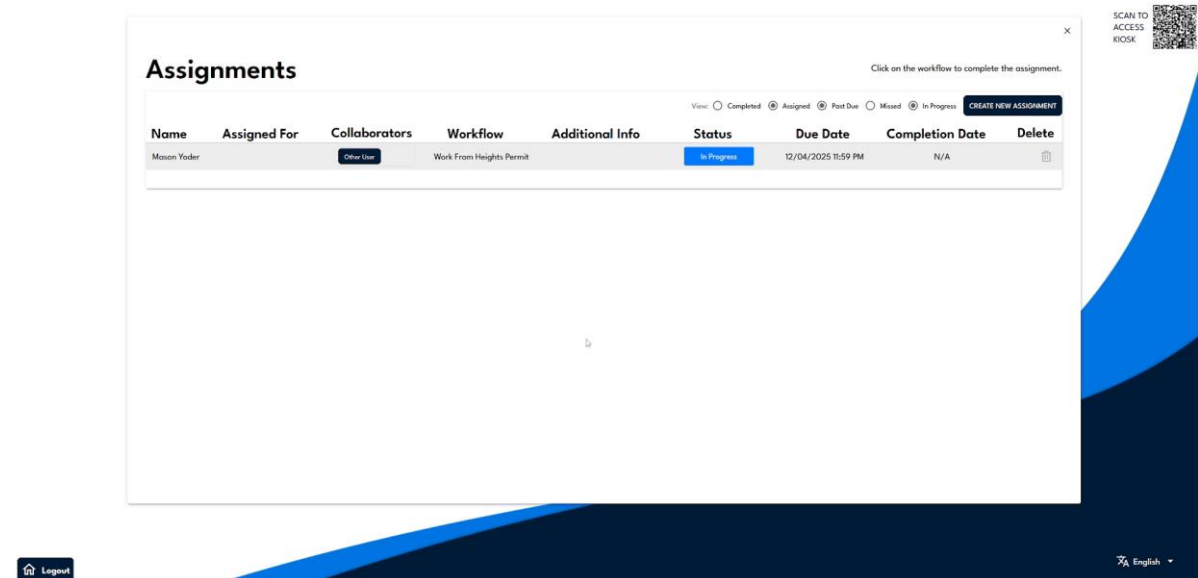
☐ Other User

Previous 1
Next

Add Collaborator(s)
Close

Step 5

Select another user to become a collaborator. Then, switch to that user's account to proceed. In their assignments section, you can view that they have been added as a collaborator to the work-from-heights permit.



The screenshot displays a web application interface titled "Assignments". At the top right, there is a QR code with the text "SCAN TO ACCESS KIOSK". Below the title, a message states "Click on the workflow to complete the assignment." and a "CREATE NEW ASSIGNMENT" button is visible. A filter bar shows options: View: ☐ Completed ☒ Assigned ☐ Past Due ☐ Mixed ☐ In Progress. The main content is a table with the following columns: Name, Assigned For, Collaborators, Workflow, Additional Info, Status, Due Date, Completion Date, and Delete. The table contains one row for "Mason Yoder", with "Assigned For" set to "Other User", "Workflow" set to "Work From Heights Permit", "Status" set to "In Progress", "Due Date" set to "12/04/2025 11:59 PM", and "Completion Date" set to "N/A". A "Logout" button is in the bottom left corner, and a language selector "English" is in the bottom right corner.

Name	Assigned For	Collaborators	Workflow	Additional Info	Status	Due Date	Completion Date	Delete
Mason Yoder	Other User		Work From Heights Permit		In Progress	12/04/2025 11:59 PM	N/A	

Step 6

Select the permit and open it to see that the information entered from your account is still present, and updates are reflected in real-time. Both team members can fill out the form as required; in this scenario, the other user only needs to add a signature to complete the process.

Excavations

Maximum Anticipated Height:

Excavations have been protected with:

☐ Guardrail system
☐ Fence
☐ Barricade

Ramps, Walkways & Bridges

Maximum Anticipated Height:

There is no walking surface that is steeper than 20° above horizontal (1 vertical to 3 horizontal)

For any walking surface steeper than 7° above horizontal (1V:8H), the surface is protected with cleats that are securely fastened not more than fourteen inches (14") apart to provide footing.

Walkways, ramps, and bridges \geq the threshold elevation have been protected with:

☐ Guardrail system
☐ Personal Fall Protection System (PFPS)

The undersigned have reviewed the fall hazards and controls for this job with the competent person(s) and understand the conditions under which permission to proceed with the work is given.

2 of 2

Complete Workflow >

Save and Exit

Step 7

After completing the form, the collaborator can simply save and exit.

Excavations

Maximum Anticipated Height:

Excavations have been protected with:

☐ Guardrail system
☐ Fence
☐ Barricade

Ramps, Walkways & Bridges

Maximum Anticipated Height:

There is no walking surface that is steeper than 20° above horizontal (1 vertical to 3 horizontal)

For any walking surface steeper than 7° above horizontal (1V:8H), the surface is protected with cleats that are securely fastened not more than fourteen inches (14") apart to provide footing.

Walkways, ramps, and bridges \geq the threshold elevation have been protected with:

☐ Guardrail system
☐ Personal Fall Protection System (PFPS)

The undersigned have reviewed the fall hazards and controls for this job with the competent person(s) and understand the conditions under which permission to proceed with the work is given.

2 of 2

Complete Workflow >

Save and Exit