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| | **Mobile User Guide** |
| | **Intelex Safety Meeting** |
| **Project Sponsor: Chris Kirby** | **Project Number: 135247** |
| **Business Analyst: Brian Helfrich** | **ISS Project Lead: Susan McIntosh / Ariel Ross** |

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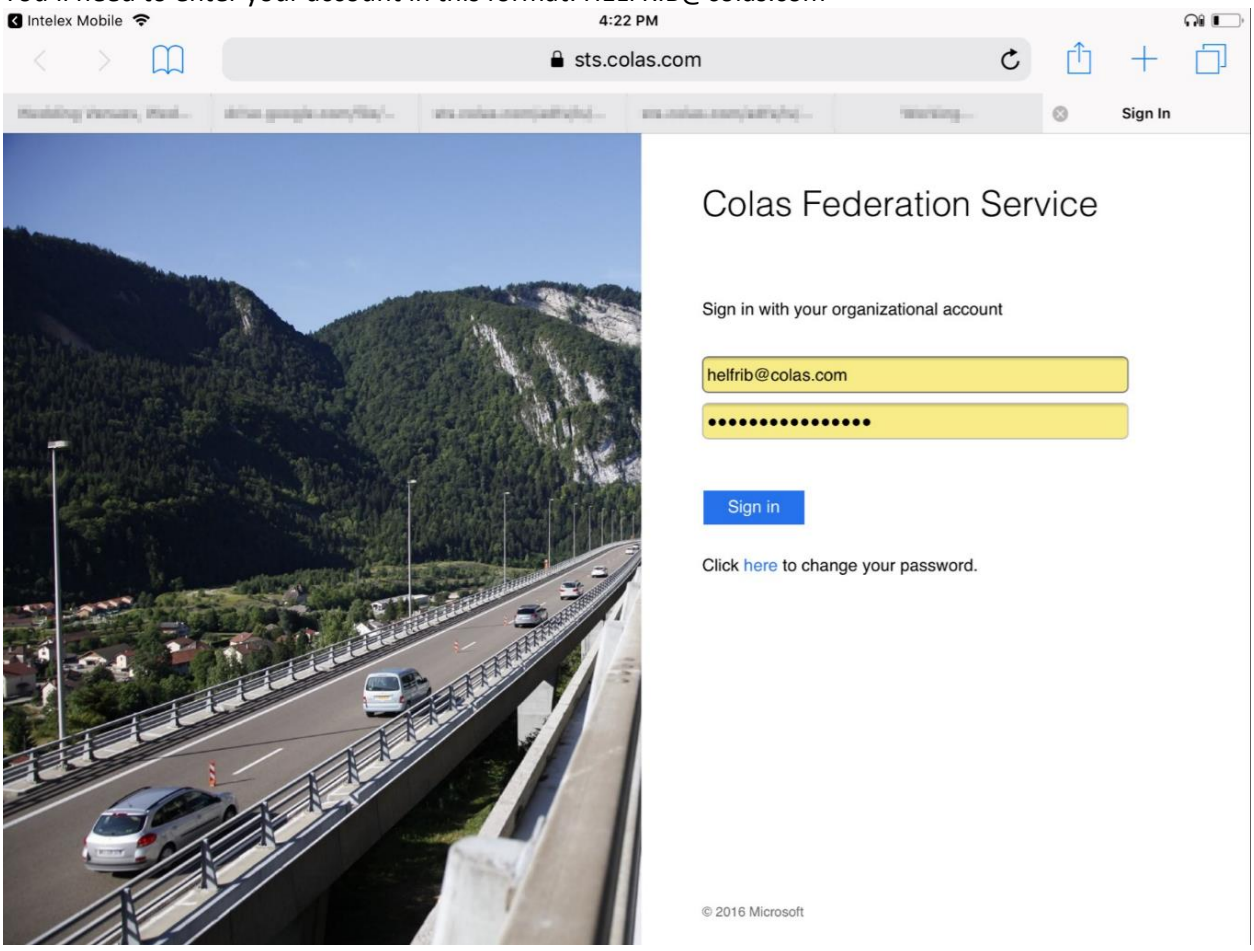
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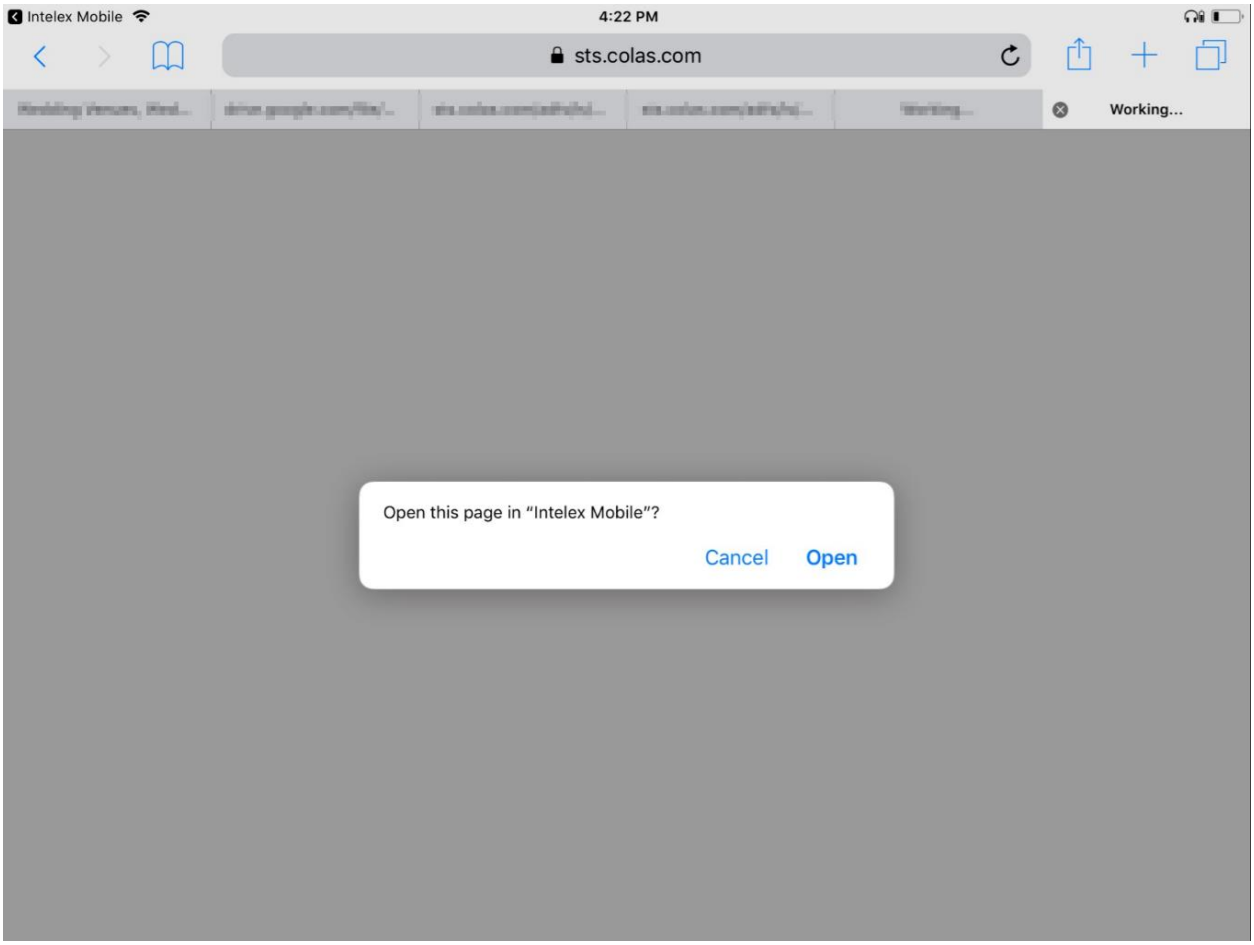
# Login

Select the Intelex Mobile APP from Apple APPS.
Load this link when prompted. https://clients.intelex.com/Login3/ColasUSA/

The Intelex production environment uses Single Sign-On (SSO) to authenticate with your Colas account, meaning your password is the same as your Office365 account. When you log into the website or mobile app, you'll notice you are taken to the Colas Federation Service sign in page as shown below. You'll need to enter your account in this format: HELFRIB@colas.com



After entering your credentials and tapping Sign In, tap “Open” on the pop up asking if you’d like to open this page in ‘Intelex Mobile’.

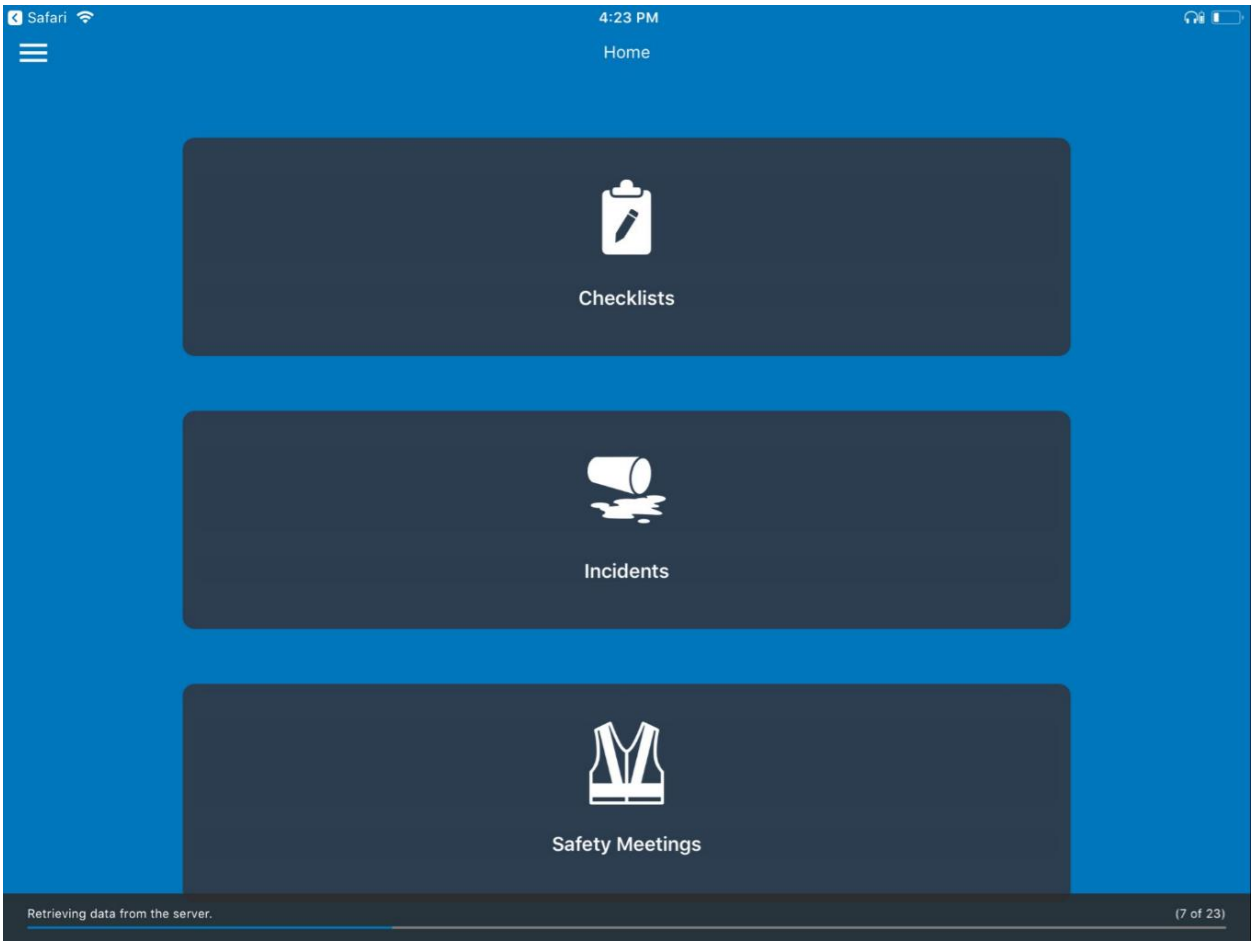


Back in the Intelex mobile environment, a spinning progress bar appears while you're signed you in.



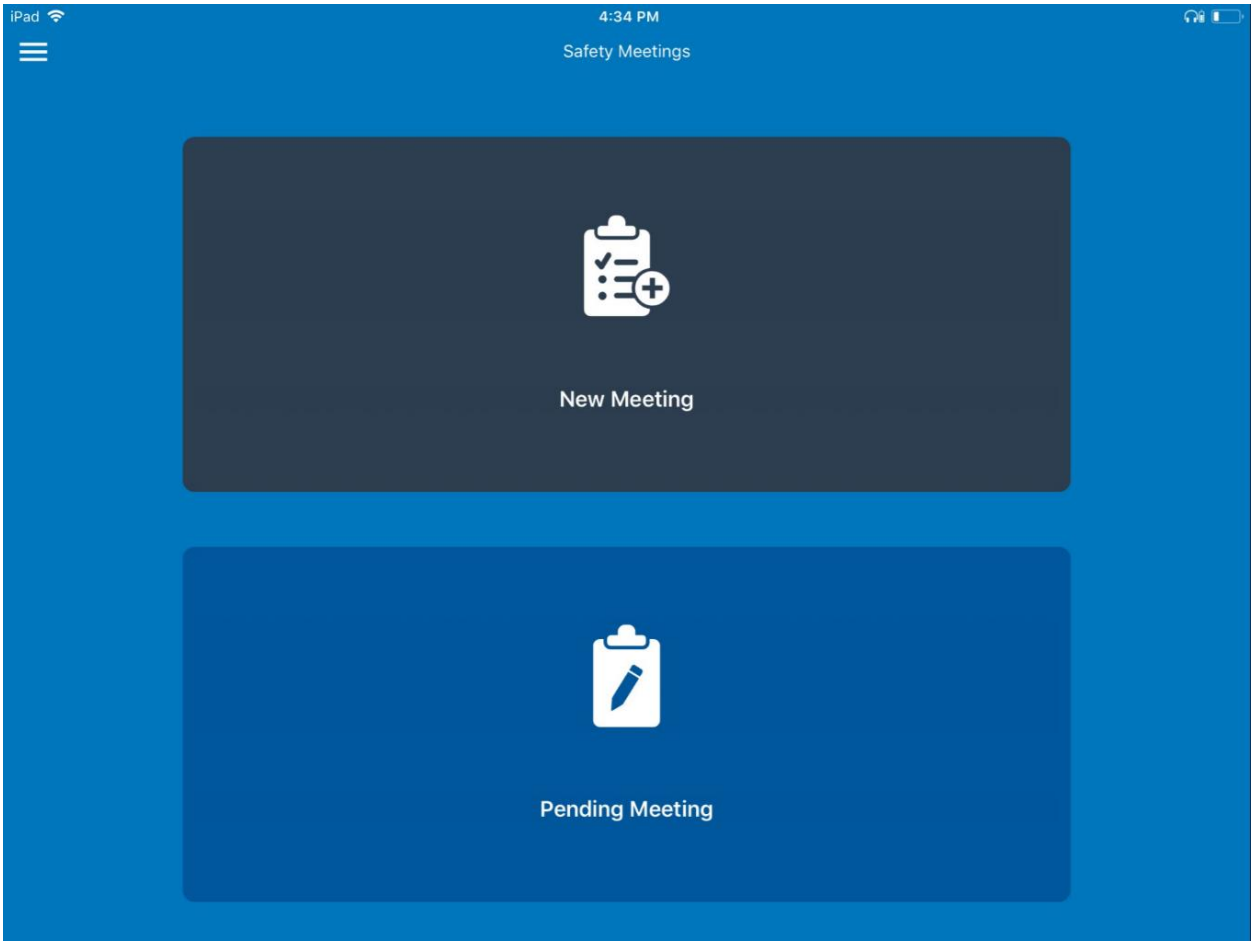
# Opening the Safety Meetings app

Once you are signed in, the Intelex mobile environment will download all of the mobile application updates that have been created or updated since your last sign-in. You'll see a progress bar at the bottom of the screen.




Once the progress bar disappears, tap the icon for the application you are trying to launch. In this case we will tap on the "Safety Meetings" icon.

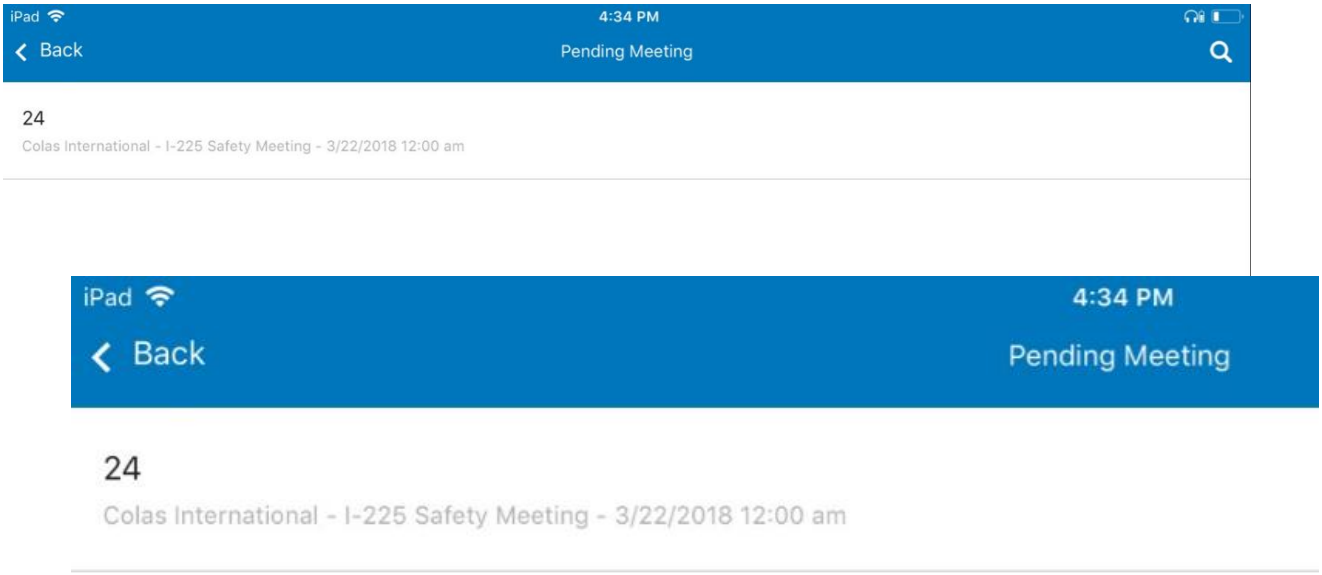
The Safety Meetings application opens and shows “New Meeting” and “Pending Meeting” tiles. All regularly-scheduled meetings will be listed under Pending Meetings.




**Please note:** The “New Meeting” tile exists in the event you have a single, unscheduled meeting that you want to enter. This will only allow for one-time meetings; you cannot set a recurring frequency from the mobile application.

# Pending Meetings

Tapping the "Pending Meeting" tile takes you to a list of your next upcoming scheduled meetings.



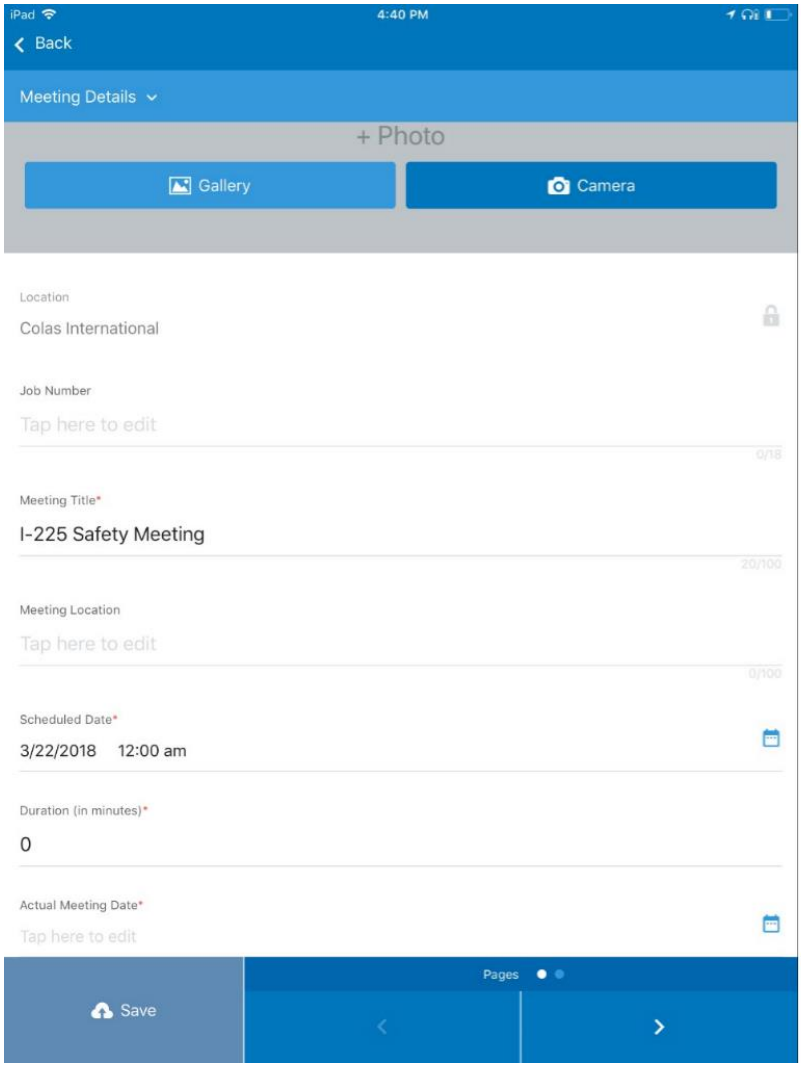

Above, you can see there is one pending meeting named the "I-225 Safety Meeting" with a date and timestamp. The Intelex environment creates one meeting at a time. After completing this meeting, it will automatically create the next meeting based on the scheduled frequency.

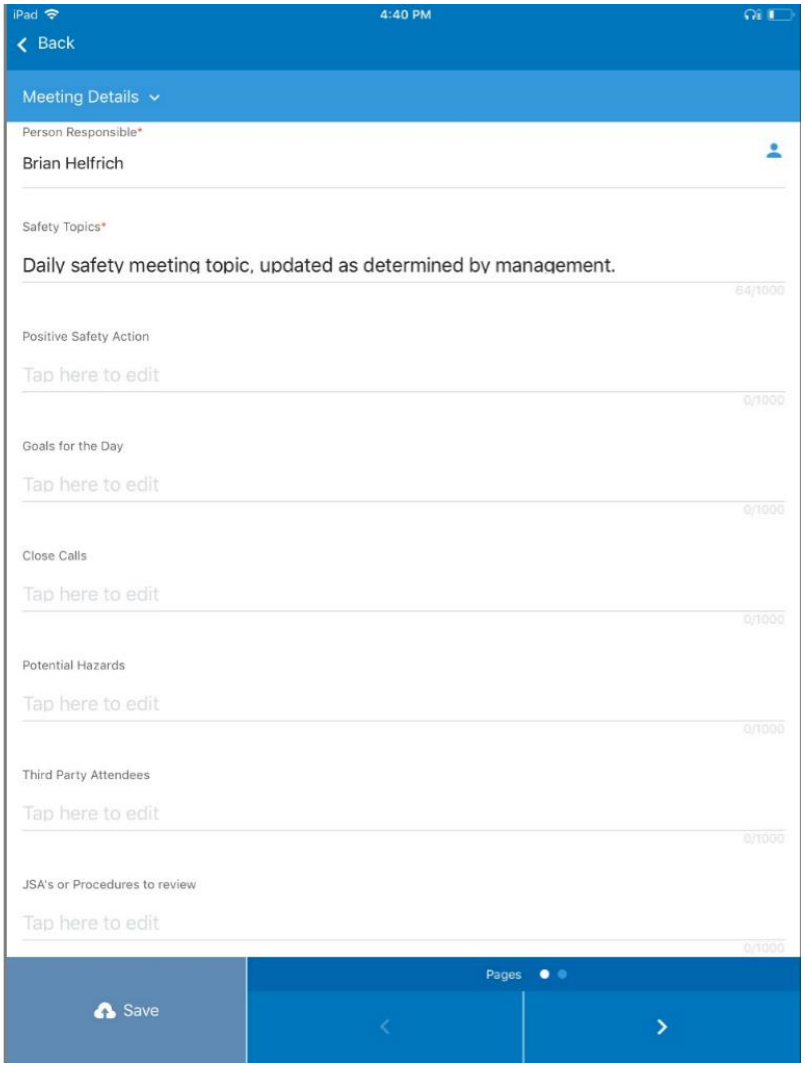
Scheduled meeting records will remain in a pending status until they are completed. If a daily meeting doesn't happen due to the weekend or inclement weather, there is not going to be a meeting entered. In this case, the meeting stays in pending meetings. Whenever you hold the next safety meeting, enter the current date in the Actual Meeting Date field.

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# Safety Meeting Form

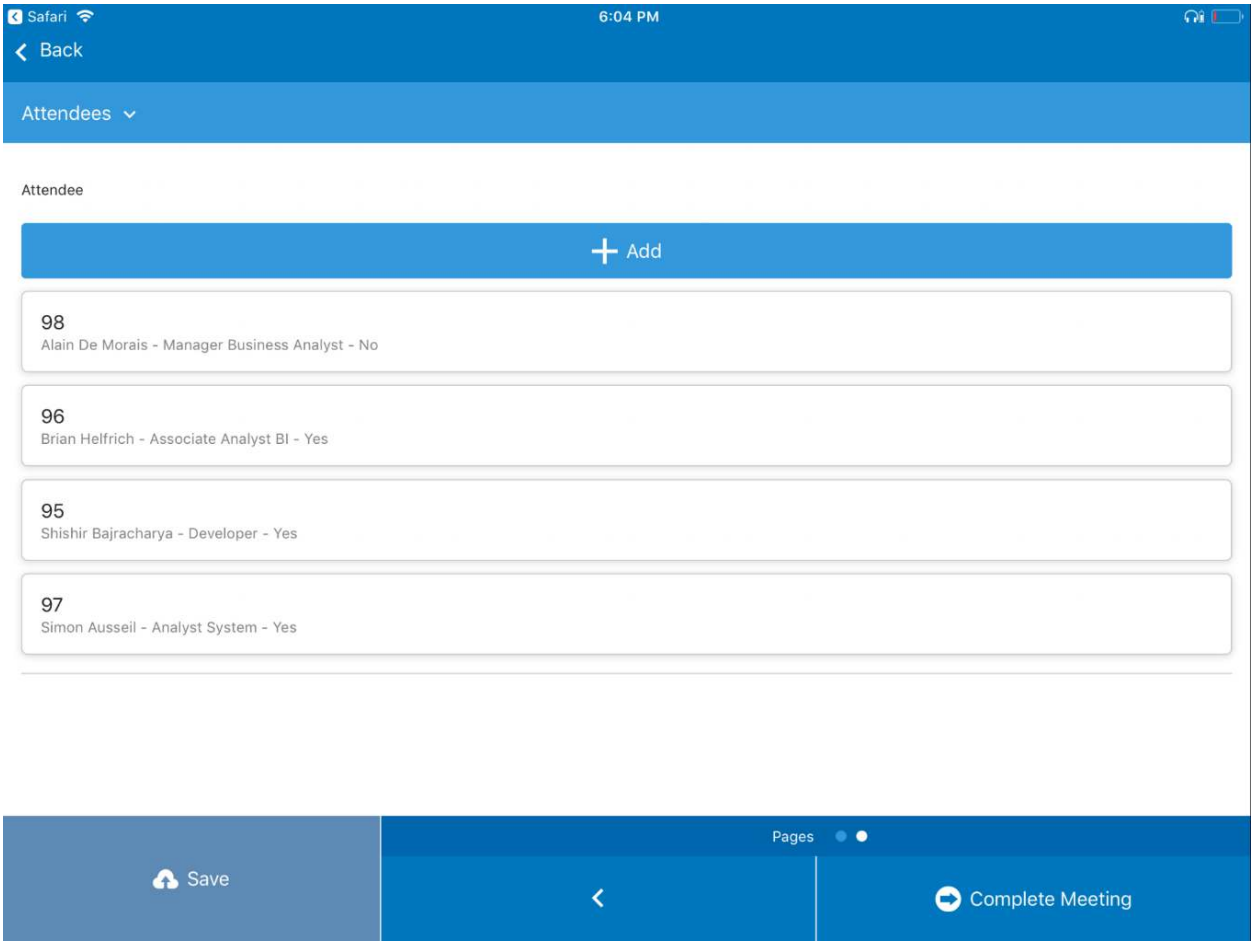
The first page of the meeting form contains the meeting detail fields for you to enter your companies' required meeting information. The screenshots here show the top of the form on the left and bottom of the form on the right.



# Meeting Attendees

The second page of the Safety Meeting form consists of the meeting's attendee list.



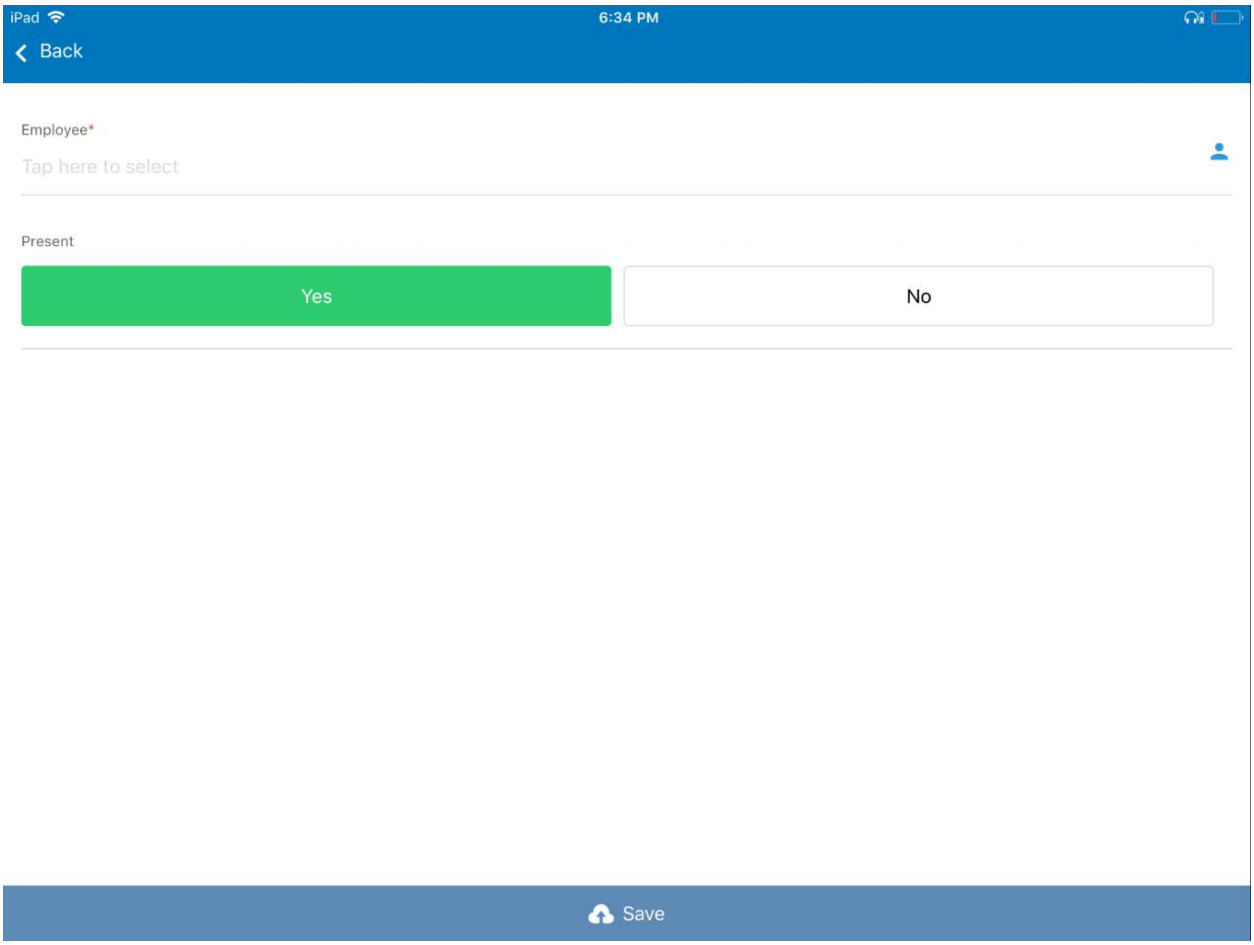

The list may need to be populated for the first meeting in your safety meeting series, but the attendee list will be copied from one meeting to the next once it has configured.

Each attendee tile contains the name, title, and a yes/no field to indicate if they were present at the meeting.

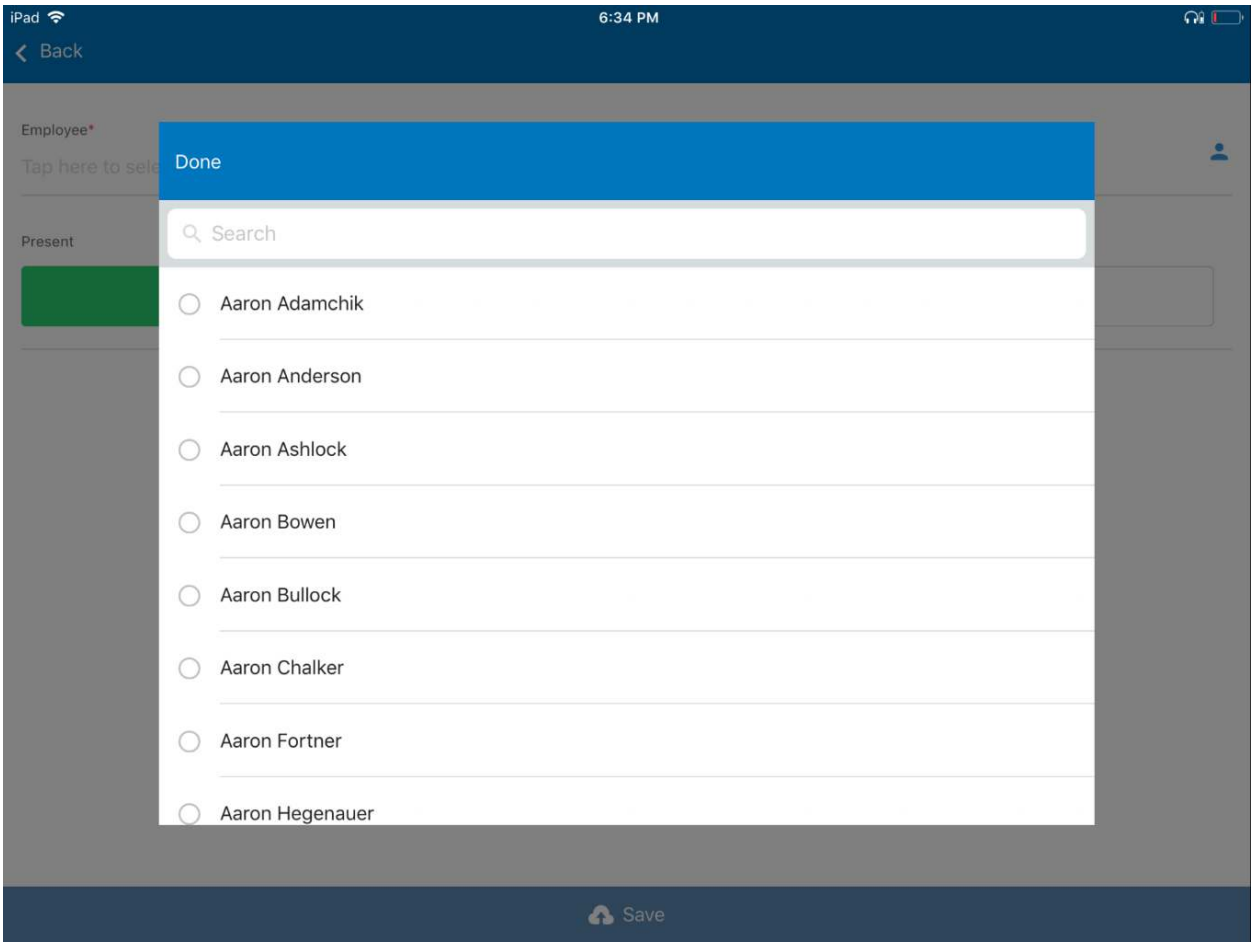
If someone misses a day but will be back in the near future, tap their name in the list and choose No rather than removing them from the entire meeting series.

## Adding an Attendee

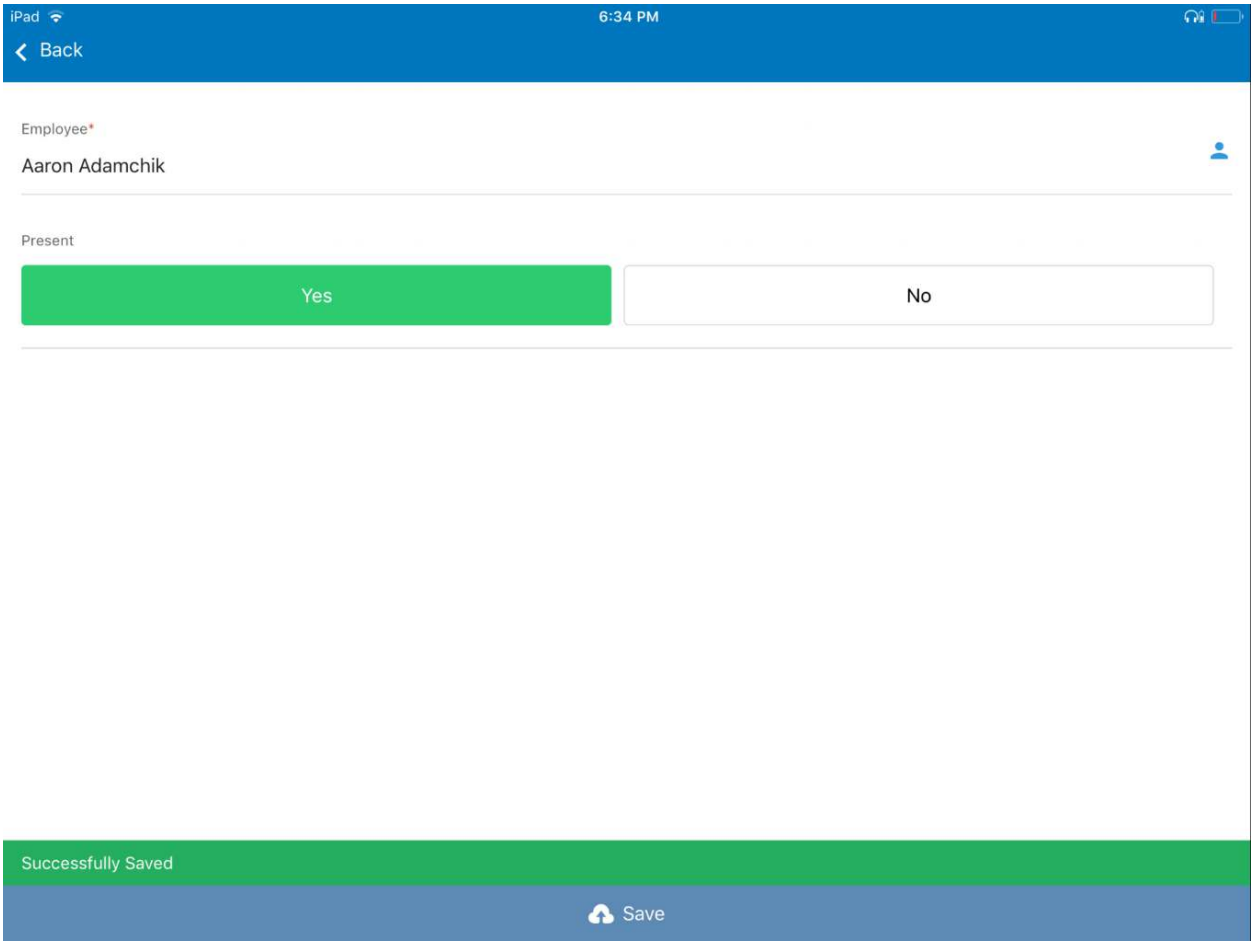
To add an attendee, tap the blue “Add” button, then tap the grey text that says “Tap here to select”



Search for the employee you are trying to add and tap the radio button to the left of their name, then tap “Done”.



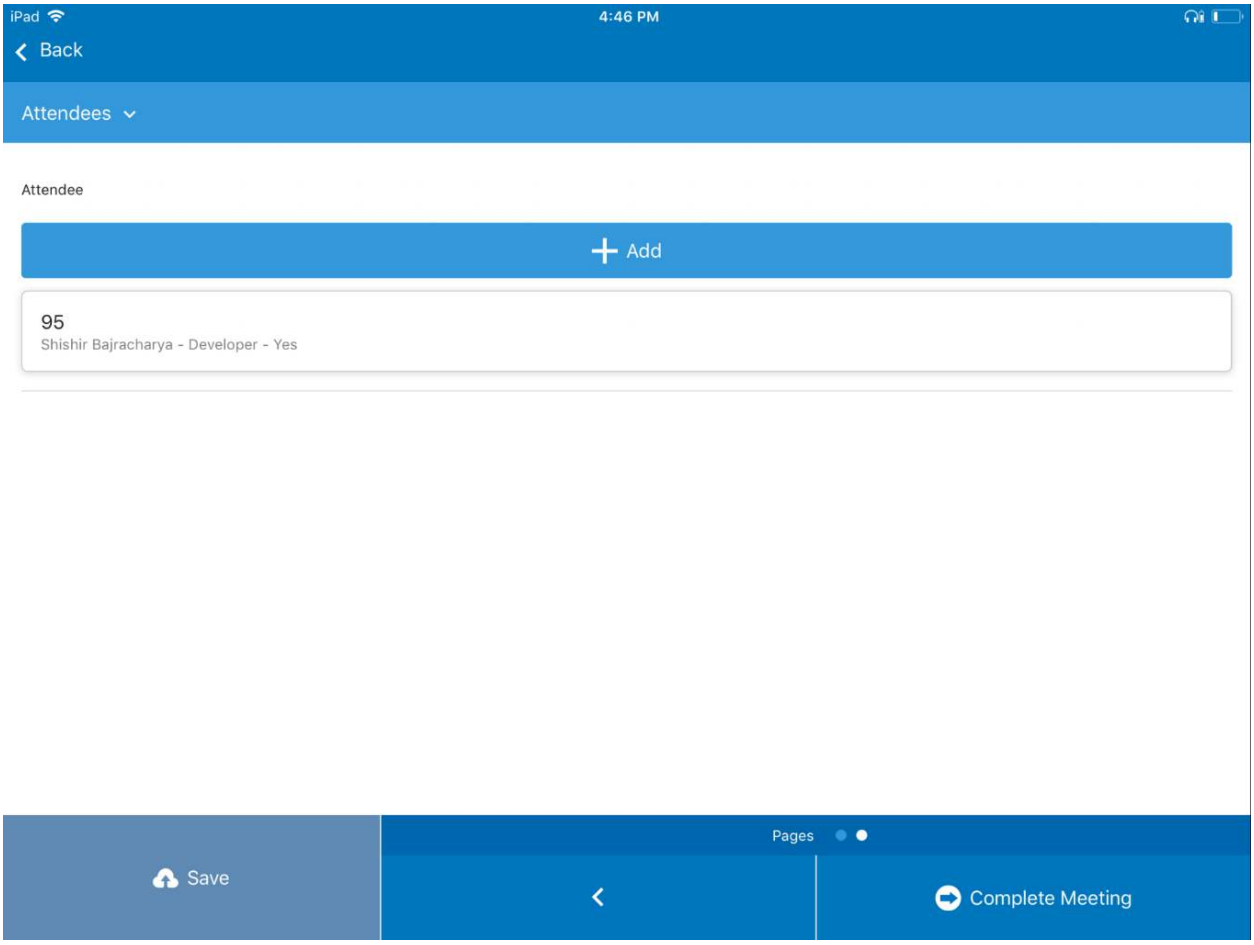
To save the new employee to the meeting's Attendee list, you must tap "Save" at the bottom of the screen.



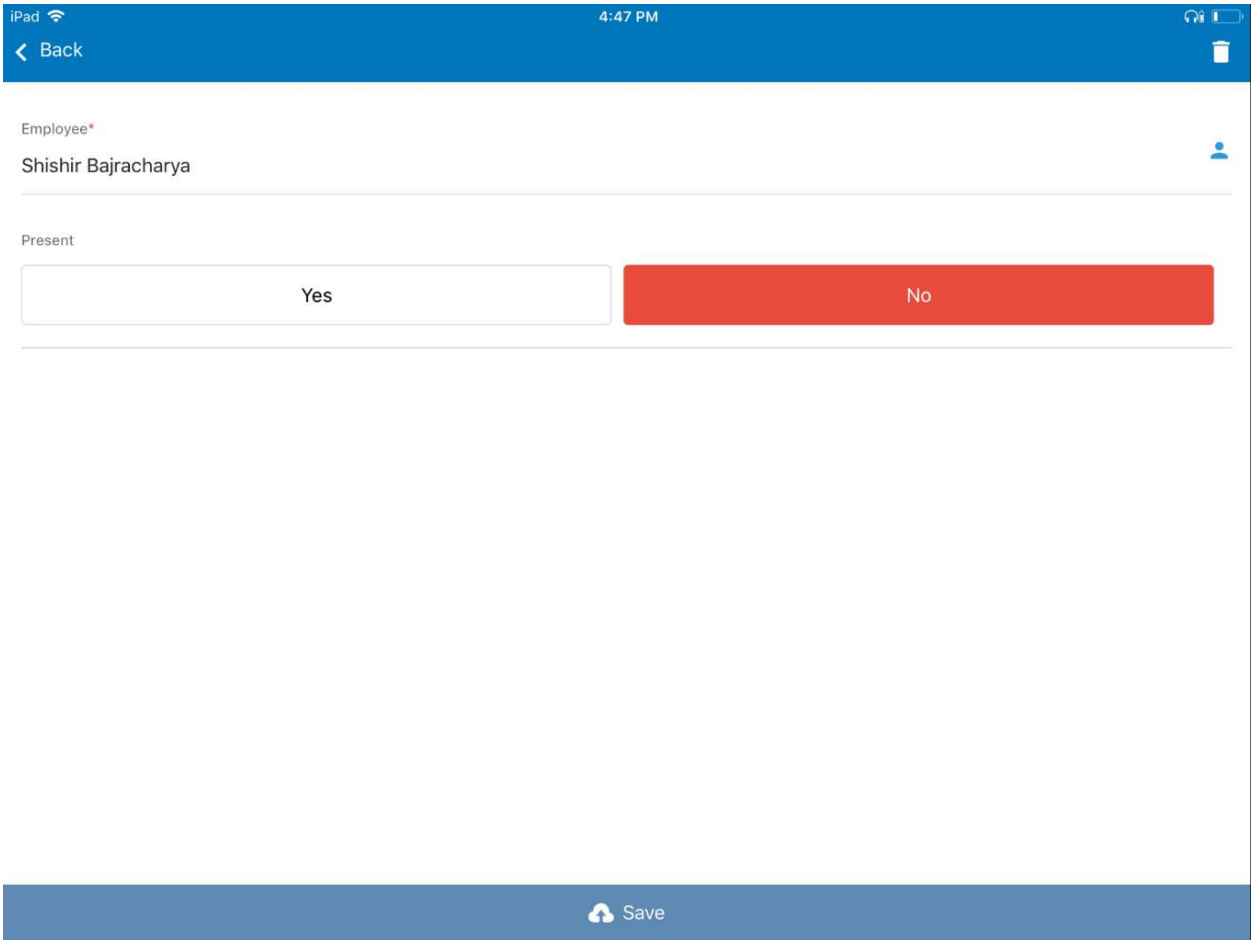

Once it has been saved, you will see a green bar just above "Save" that informs you the employee has been saved. At this point, tap the Back button to return to the list of attendees.

## Indicating an Attendee's Absence

If an attendee misses a safety meeting, we must select their name from the attendee list to go into their attendee record and change the presence flag to indicate "No".



If you tap “Back” before you tap “Save”, it will ask if you want to discard your changes. You must tap “Save” at the bottom of the screen and then you can navigate back to the attendee list.

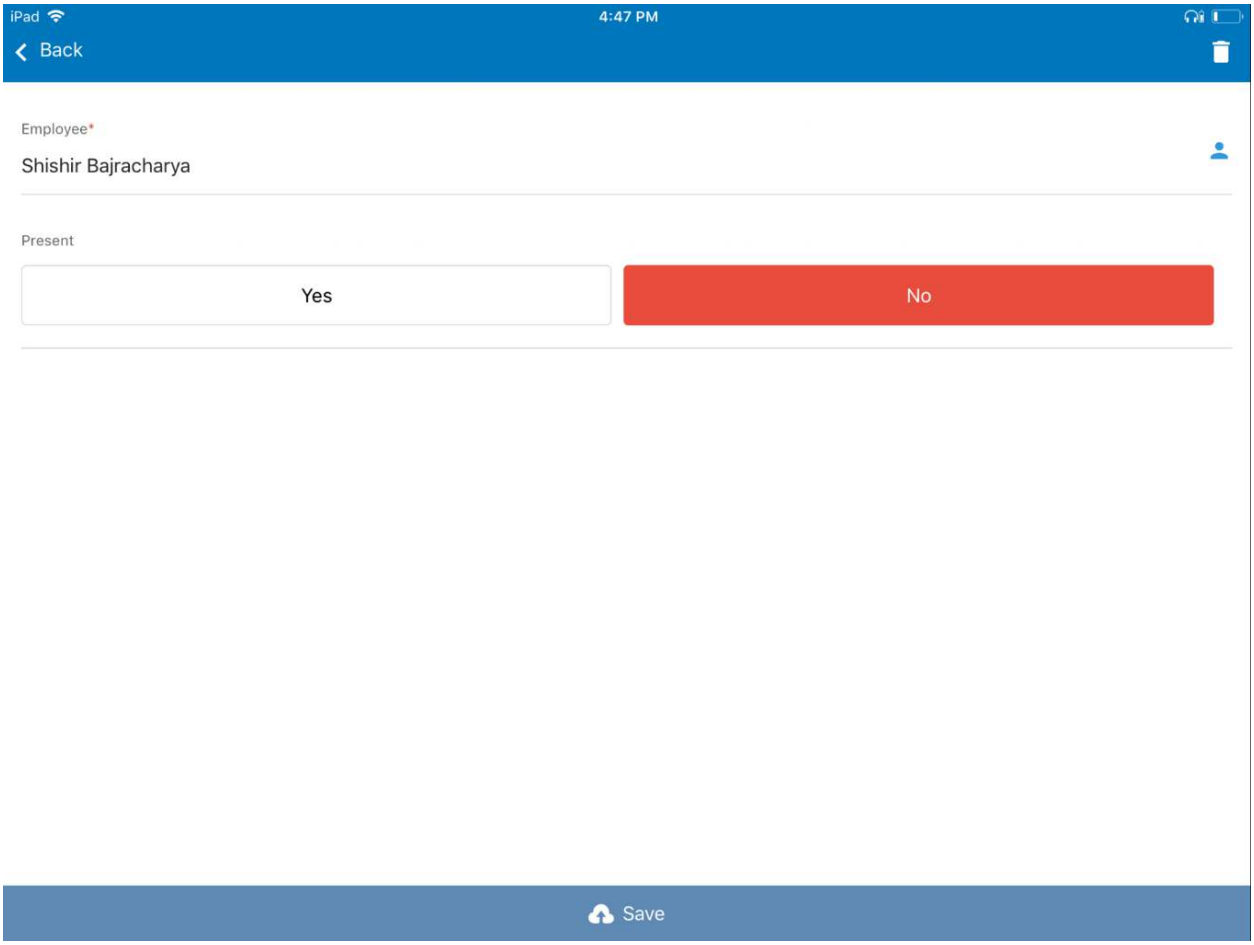


## Removing an Attendee

Removing an attendee can be done from the web or the mobile application.

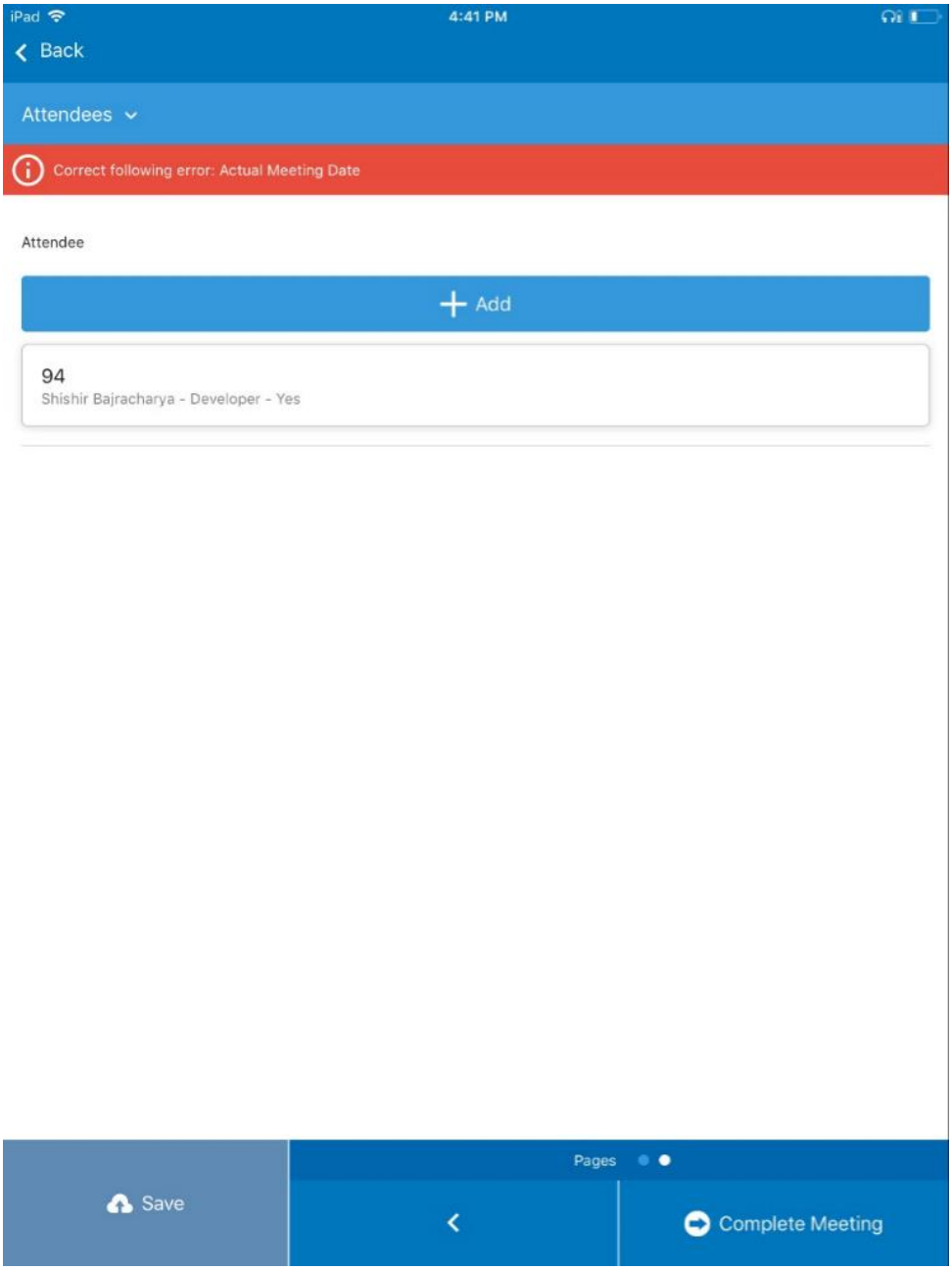
> **Please note:** Version 1.0 of the mobile application contains a bug that requires a little finesse to work around. Because this is a temporary bug that will be corrected in a future release, that is documented in Appendix A at the end of this document. This documentation will be updated when the bug is fixed.

Instead of marking an attendee as not present, click on their name in the Attendee list and then tap the recycle bin icon in the top right corner to remove them from the meeting series. You will receive a prompt confirming if you are sure you want to delete this employee record.

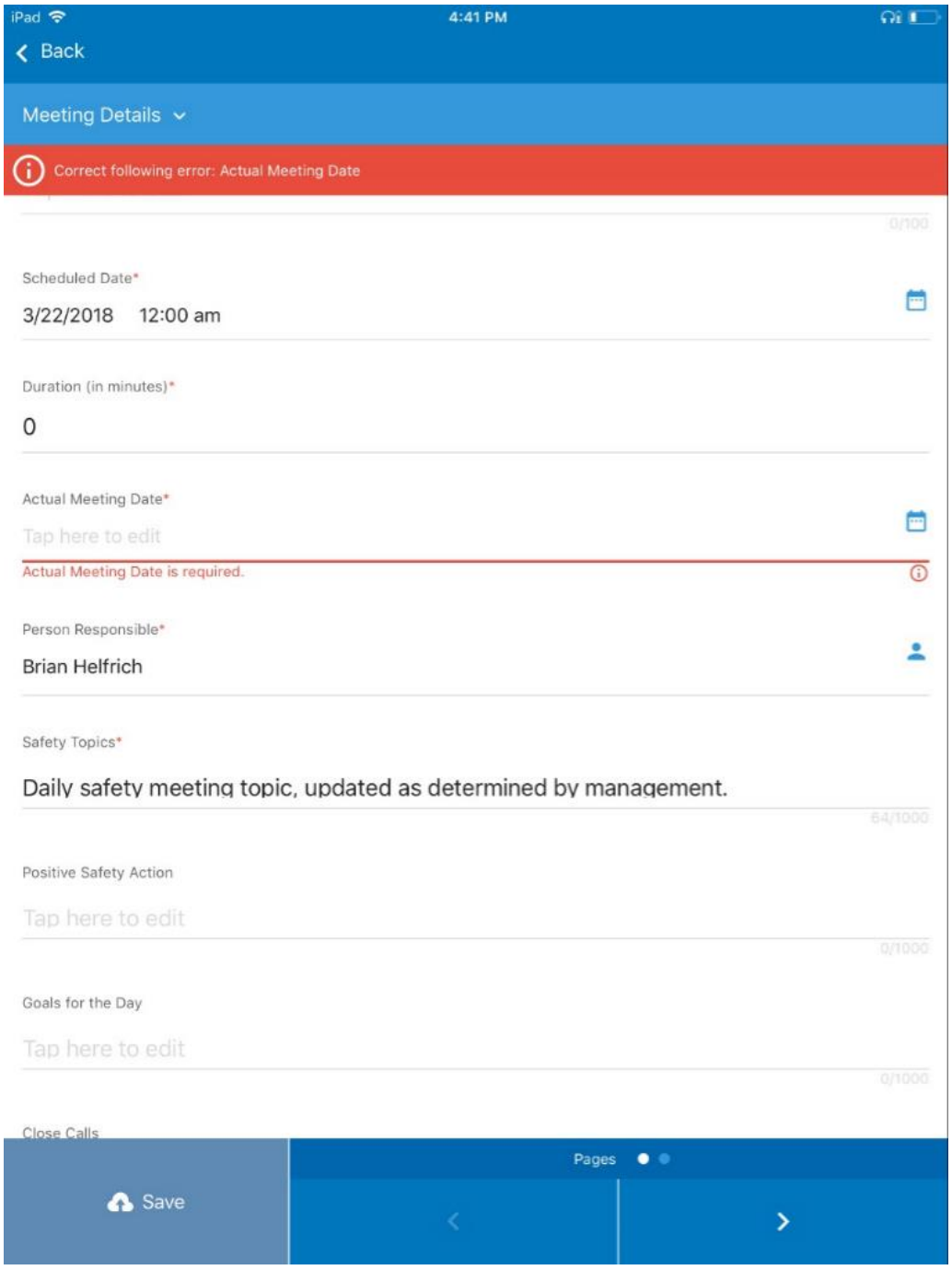


# Completing a Safety Meeting

After finishing the attendee list, you can tap "Complete Meeting" in the bottom right corner. If you have missed any required fields, an error message will appear to inform you what is missing – in this example, the "Actual Meeting Date" is missing.



To enter the missing information, click the left arrow in the bottom center of the screen and look for the field highlighted in red.



# After completing a meeting

After you complete a meeting, the saved form must be uploaded to the server to set the meeting's status as "Complete" and create the next day's meeting. This is all automatic, but it requires you to upload your meeting forms at the end of each day.

*Helpful hint:*
It's only once the completed meeting has been uploaded to the server that the next day's safety meeting is created based on the meeting series' frequency.

# Appendix A: Missing Bin Workaround

Version 1.0 of the Safety Meeting application contains a bug that doesn't show the recycle bin icon to remove an attendee in the event they are no longer going to attend a specific meeting series. Instead of creating a new meeting series we will update the list of attendees so the next meetings do not include these employees.

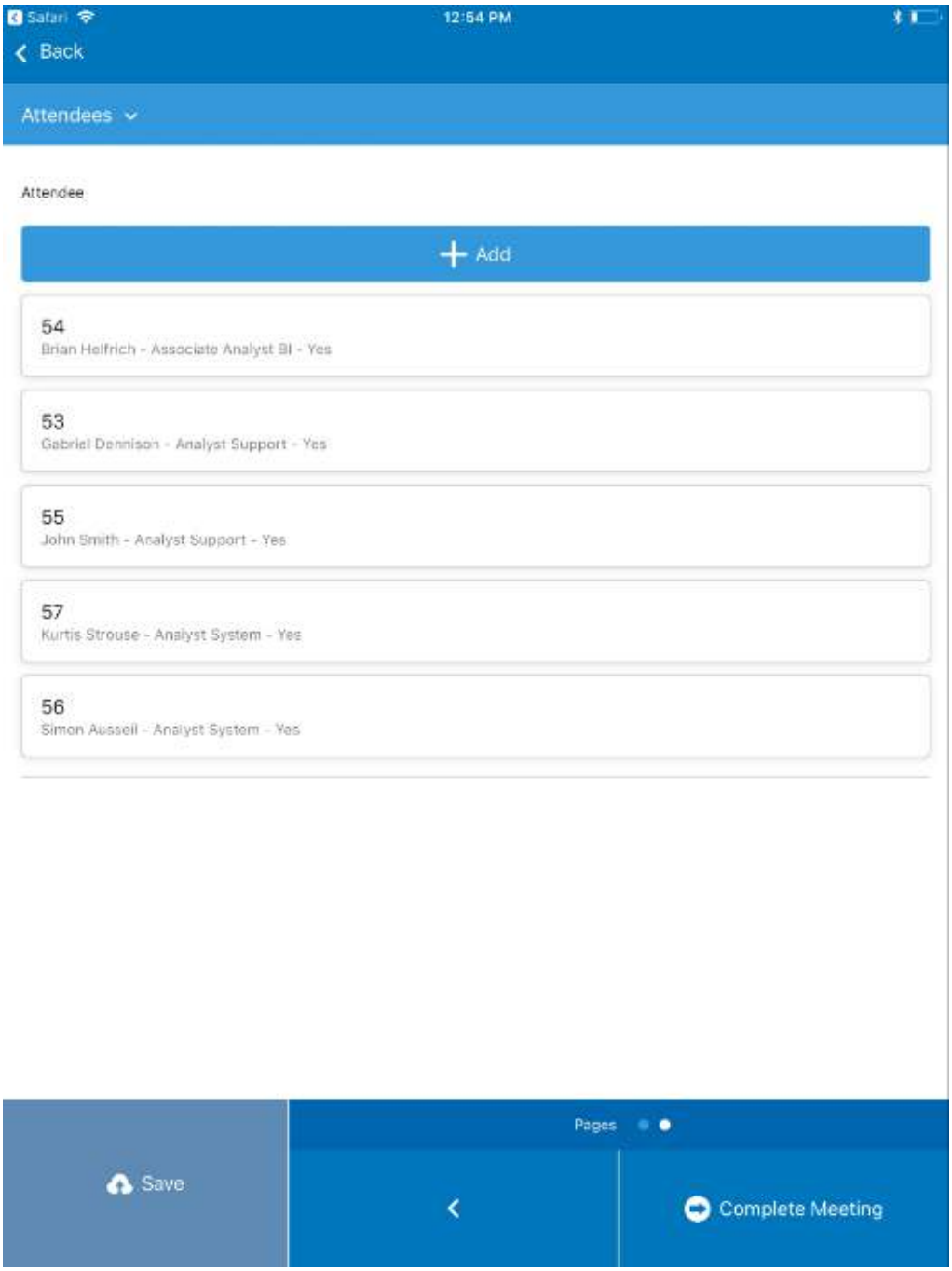
## Overview

Open the Attendees page with list of employee attendees; screenshot 1.
Select one of the records; screenshot 2. (Missing bin.)
Tap on employee name to bring up selection grid; screenshot 3. (Bin is restored.)
Tap to leave selection grid; screenshot 4. (Bin remains.)
Able to delete employee records; screenshot 5.

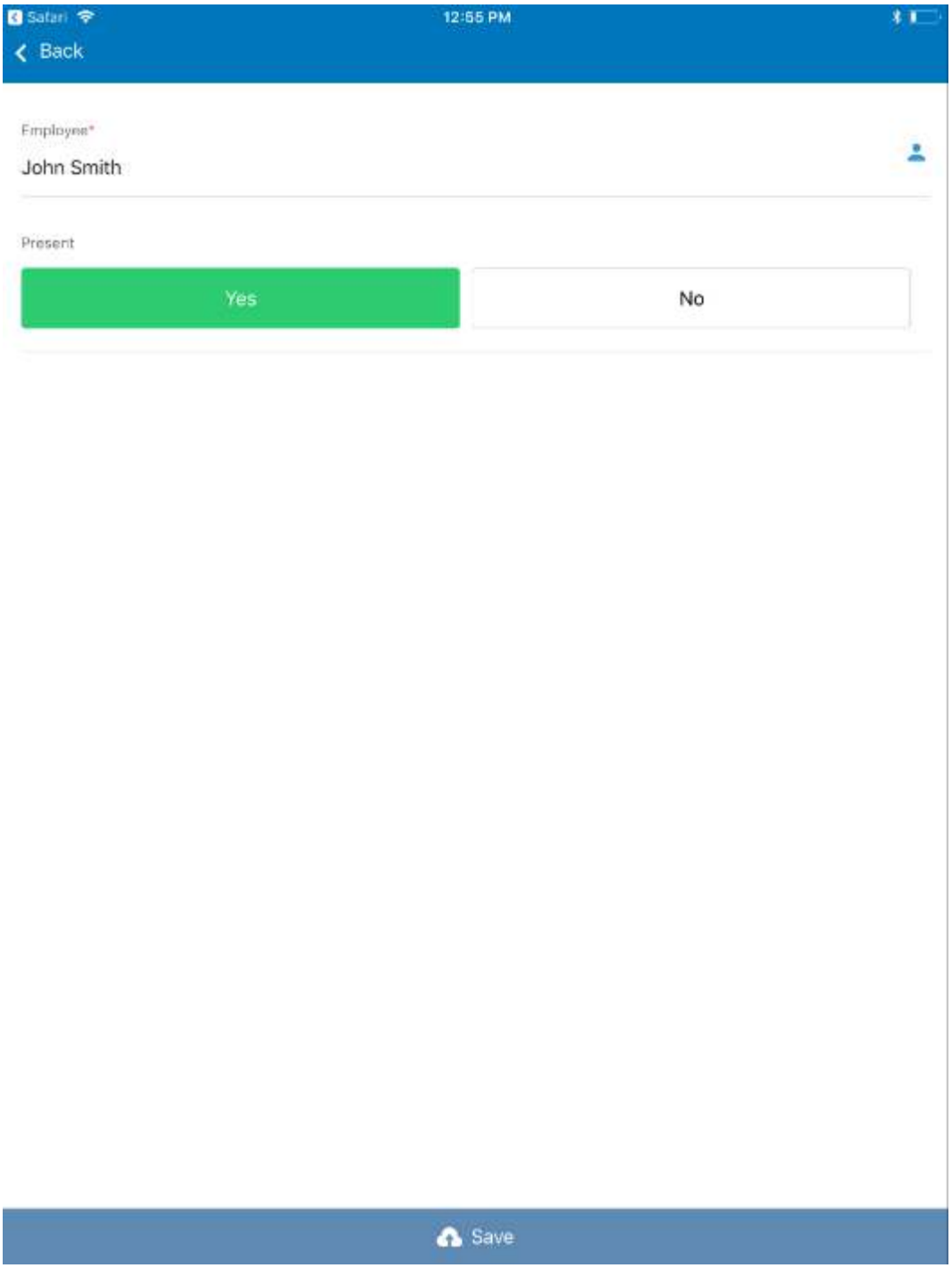
See the next page for a step-by-step screenshot guide.

Screenshot Guide

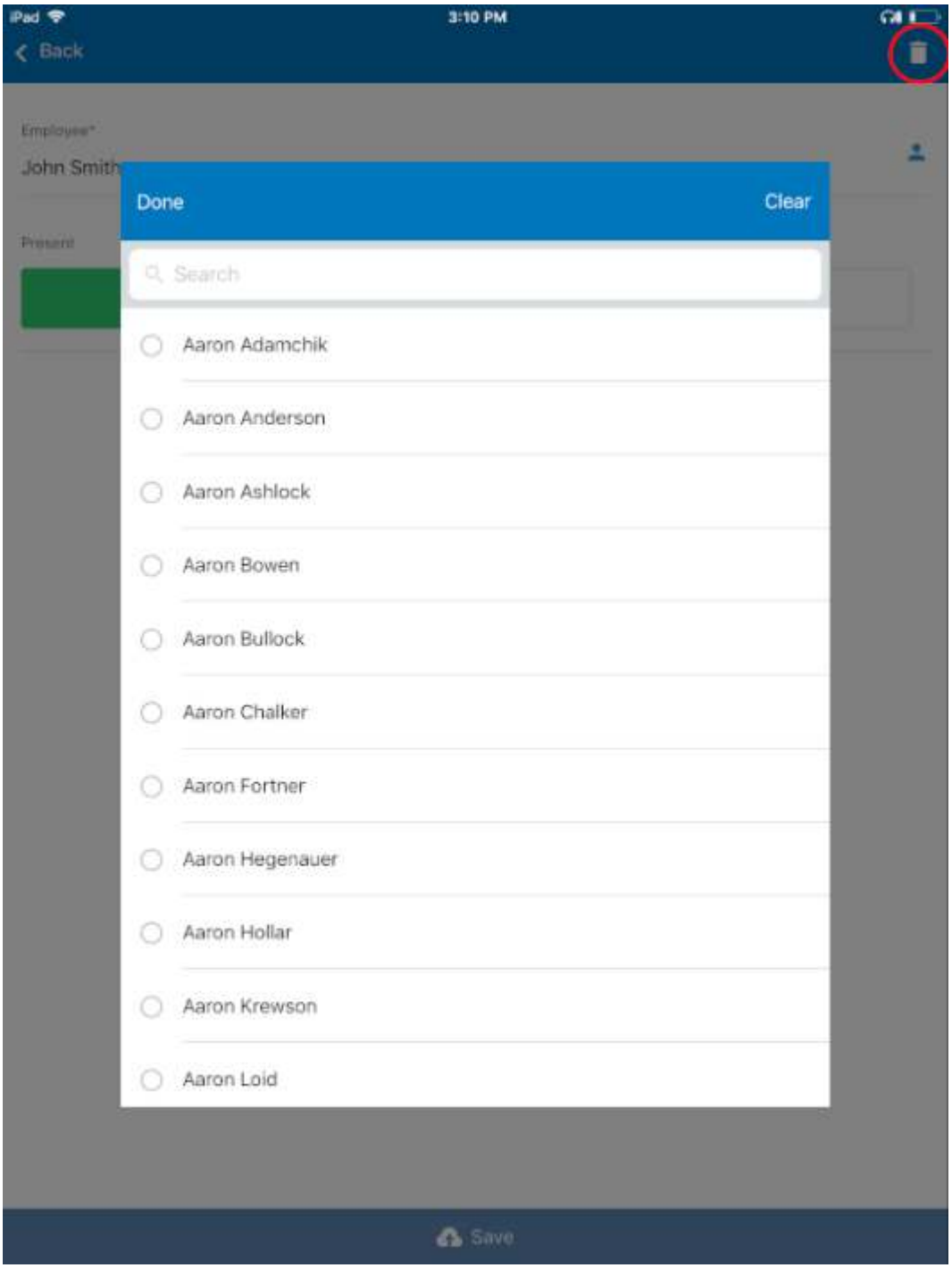
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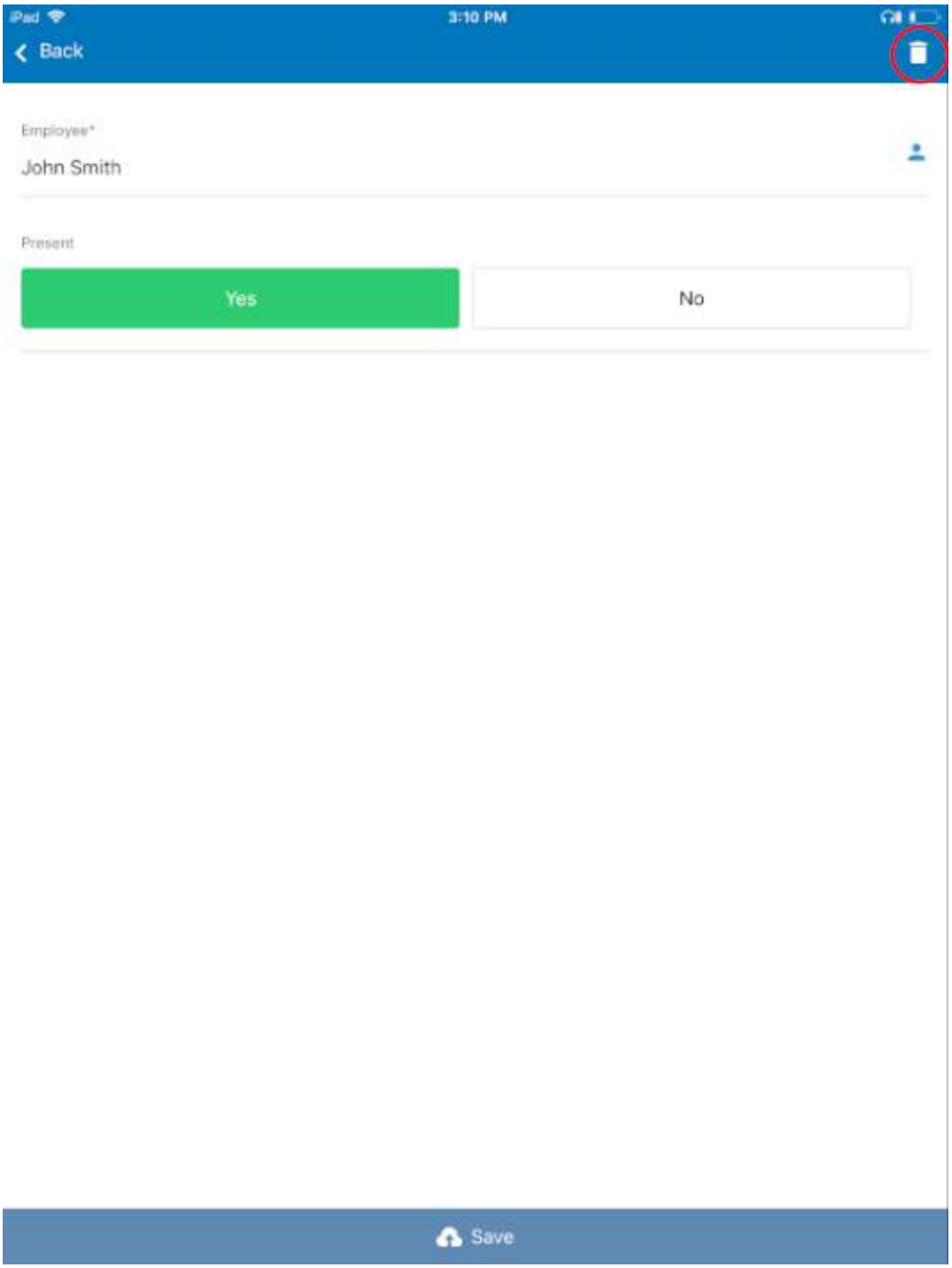
#2



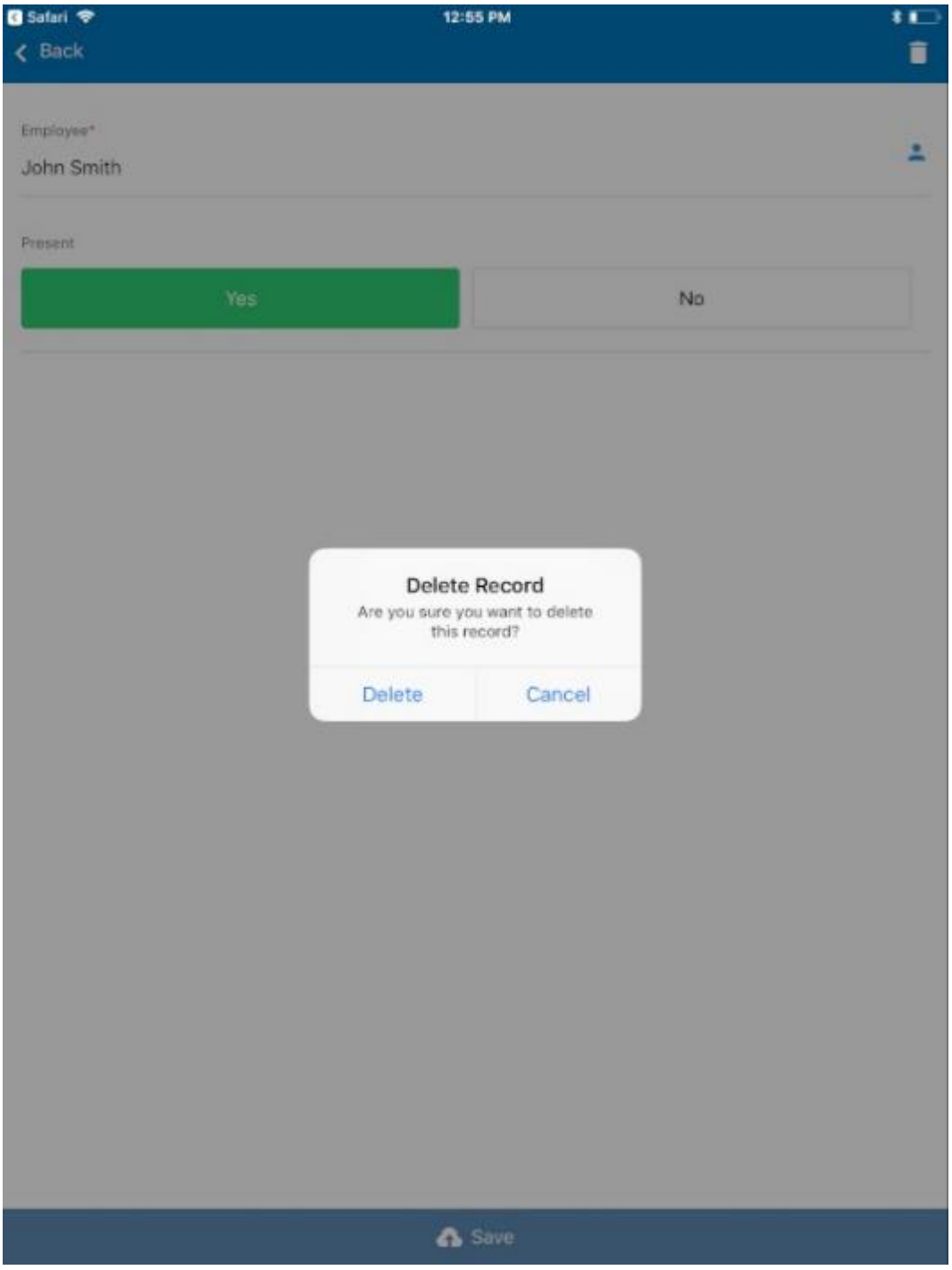
#3


iPad
3:10 PM
Back
Employee*
John Smith
Present
Done
Clear
Search
Aaron Adamchik
Aaron Anderson
Aaron Ashlock
Aaron Bowen
Aaron Bullock
Aaron Chalker
Aaron Fortner
Aaron Hegenauer
Aaron Hollar
Aaron Krewson
Aaron Loid
Save

#4



#5


Safari
12:55 PM
Back
Employee*
John Smith
Present
Yes
No
Delete Record
Are you sure you want to delete this record?
Delete
Cancel
Save