



SafetyCulture

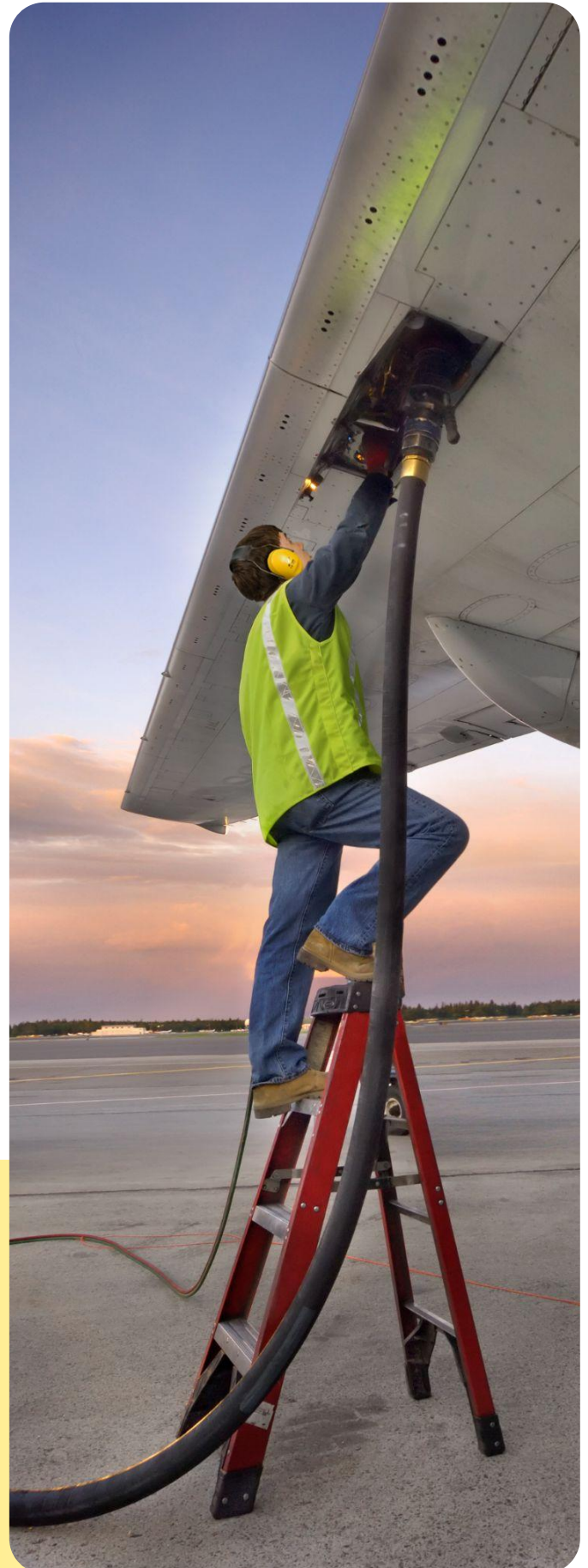
Getting started

Frontline User Training Guide

Learn how to get started with the SafetyCulture mobile application

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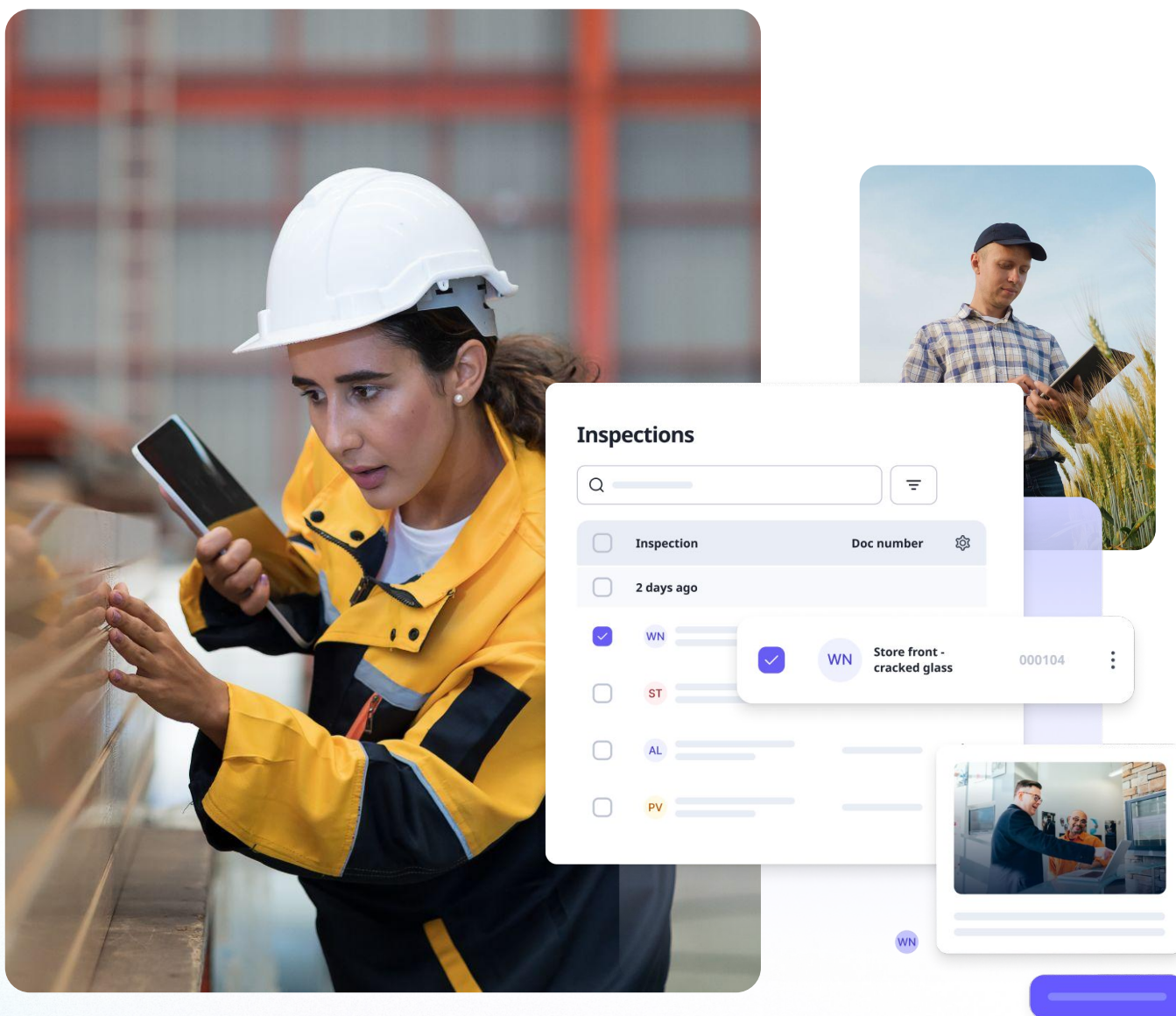
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Why SafetyCulture

SafetyCulture isn't just another app; it's a **mobile-first operations platform built for the frontline**. Our digital solution redefines the way you work, making it easy to conduct inspections and important checks, organize and complete tasks, raise and resolve issues, manage and track physical assets, learn important skills and access procedures on the go.

We put the power of improvement in the hands of every team member. So anyone can understand what's working, what's not, and what to do about it—all from their mobile device.

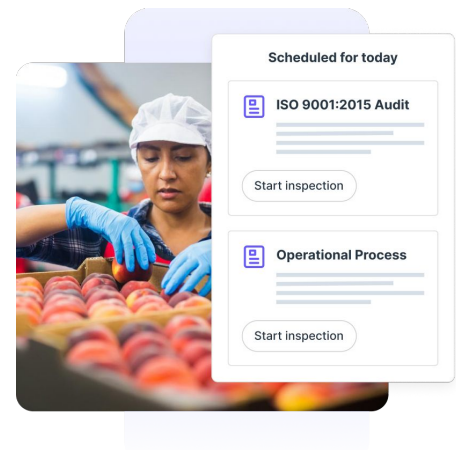


SafetyCulture overview

Templates

Go paperless with digitized processes

Templates is where you'll find digital versions of the forms, checklists, inspections, and audits that you and your team previously completed on paper, spreadsheets, or other systems.



Inspections

Execute checks in any environment

Inspections are the process you and your team go through to capture data. Easily complete digital assessments assigned to you, attach evidence, and identify problems, both online and offline.

Reports

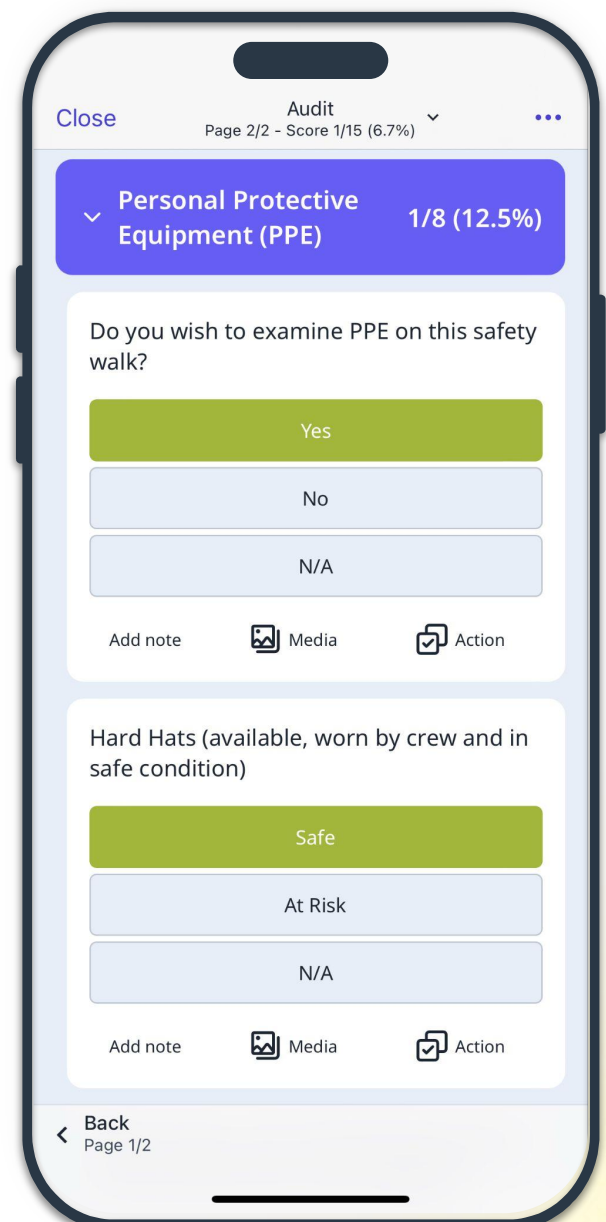
Generate professional reports on the spot

Once you have completed an inspection, you can download and share professional reports that give a clear view of what was assessed, outstanding items, and any next steps.

Actions

Complete tasks on time, every time

Actions is your go-to task management tool. Quickly create and assign corrective actions or follow-up tasks at any time, and ensure the work gets done with reminders and notifications.



SafetyCulture overview

Issues

Report what happens, when it happens

Issues gives you and your team the ability to capture and report what's happening on-site, while instantly notifying the right people for collaborative resolution.

Heads Up

Never miss a critical message again

Heads Up simplifies workplace communications, allowing you to stay informed by receiving, acknowledging, and engaging with updates from your team and head office.

Training

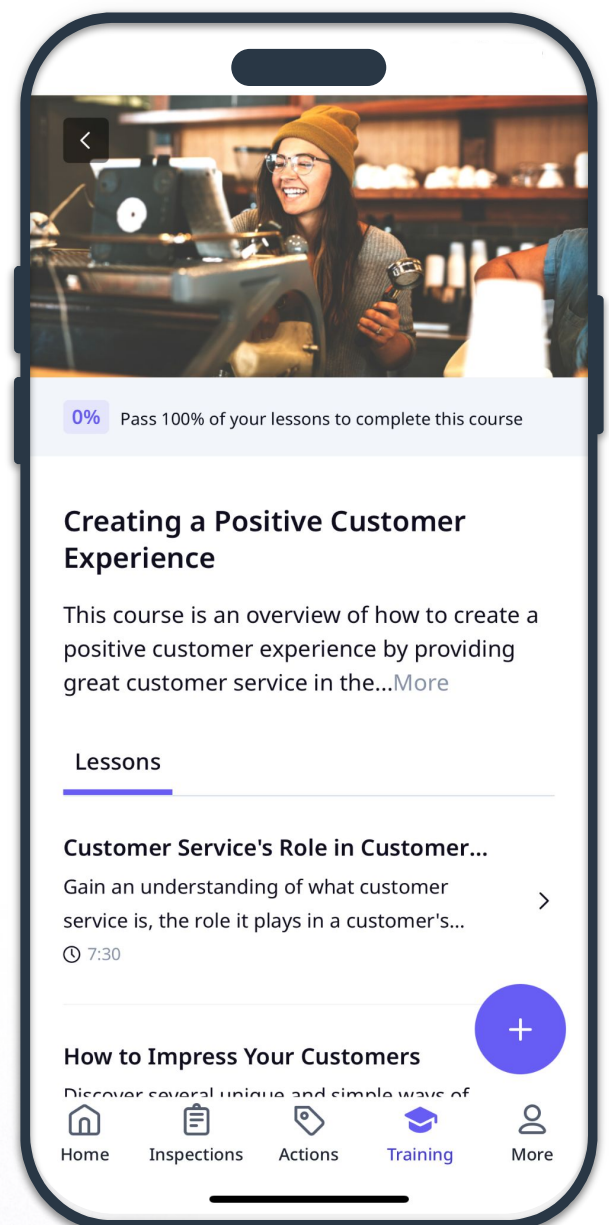
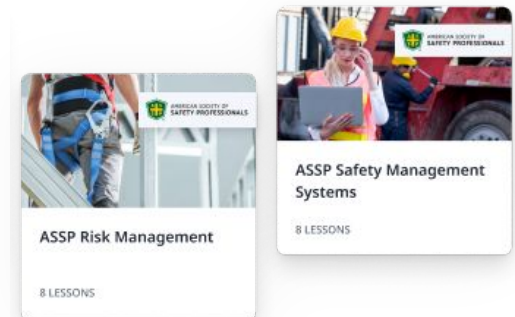
Learn from the palm of your hand

Training makes it easy to grasp vital concepts and retain the knowledge required to excel at your work. Earn certificates and explore assigned courses you can complete on the job.

Assets

Maintain the equipment you use

Assets provides an easy way to access important asset information and record any completed work on the equipment, vehicles, and machinery you rely on every day.



Download SafetyCulture

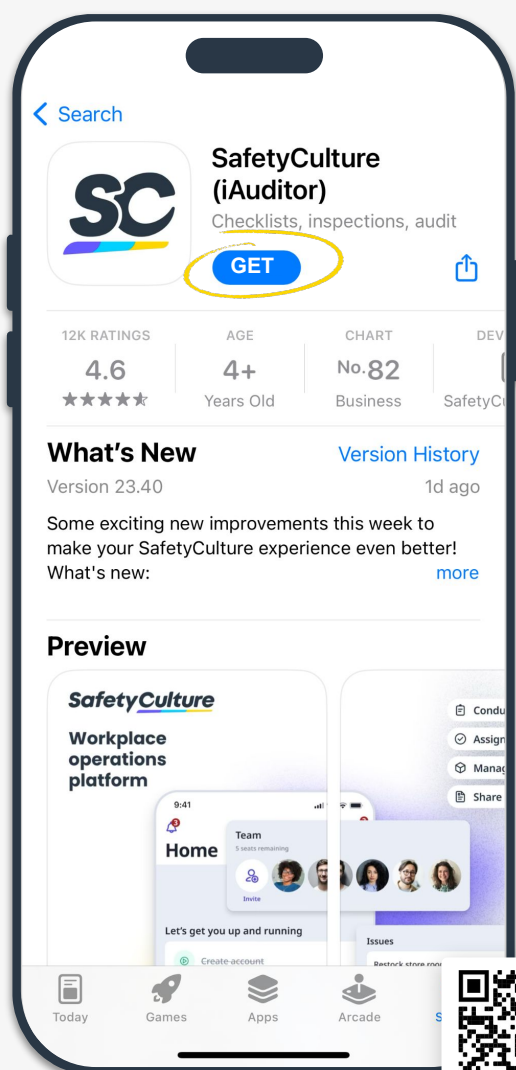
ios

Option 1: App Store search

1. Open the App Store.
2. Search for SafetyCulture.
3. Press **GET**.

Option 2: QR code

1. Scan the QR code.
2. Follow the link to the App Store.
3. Press **GET**



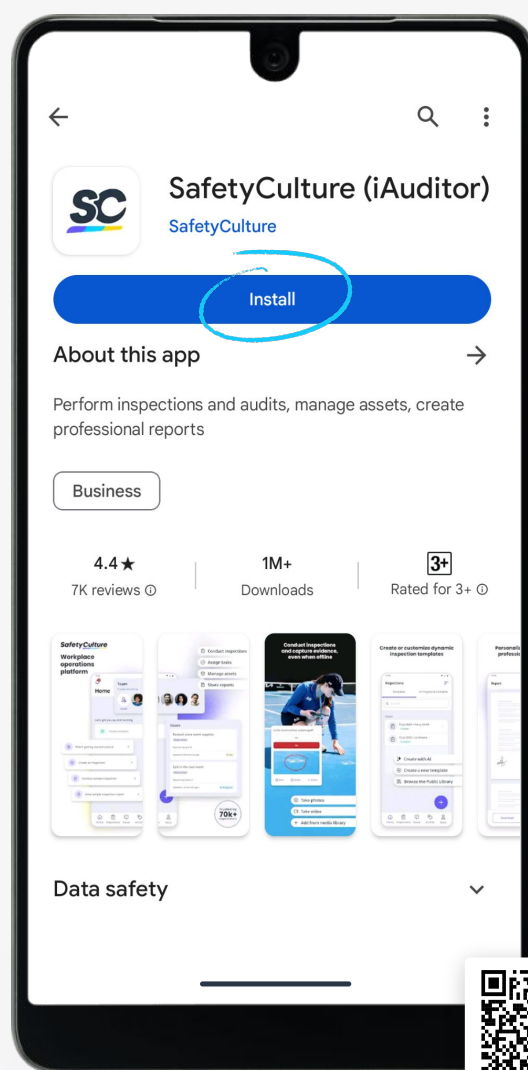
Android

Option 1: Google Play Store search

1. Open the Google Play Store.
2. Search for SafetyCulture.
3. Press **Install**.

Option 2: QR code

1. Scan the QR code.
2. Follow the link to the Google Play Store.
3. Press **Install**.

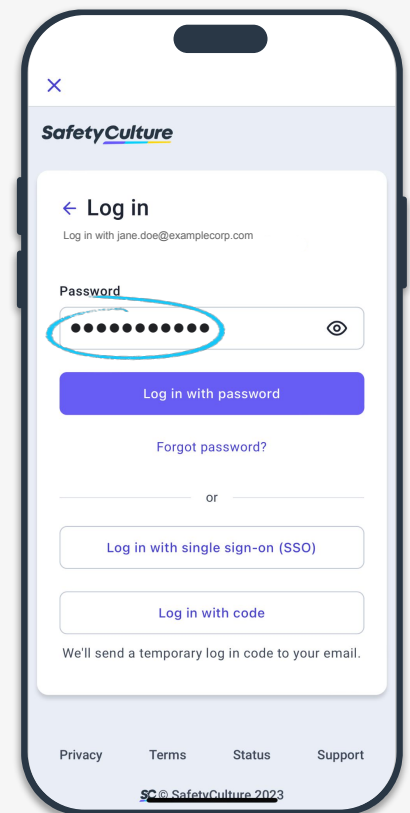
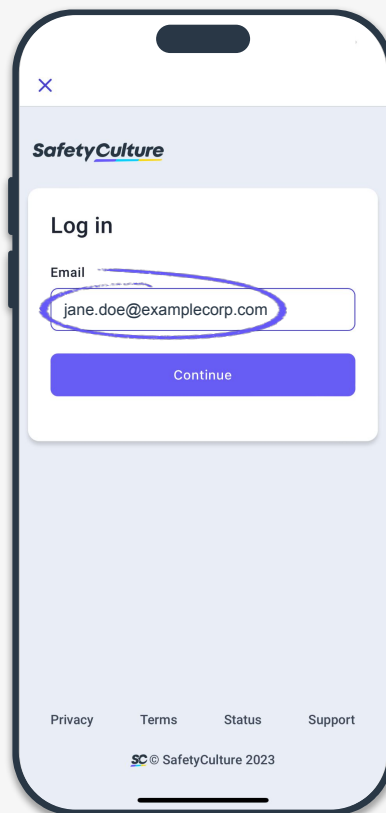
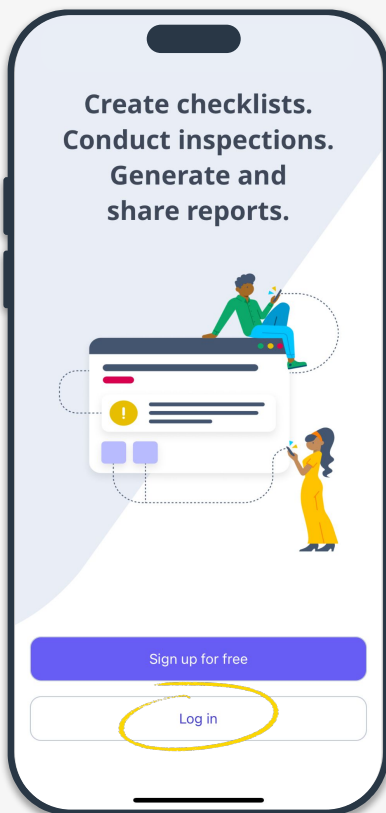


Log in to SafetyCulture

 **Tip:** If you received an email titled "Activate your SafetyCulture account," it means you've been invited to join an existing organization. To get started, you'll need to set a password on your mobile device's web browser.

Alternatively, your account administrator may have set a temporary password on your behalf. If you don't know your password, tap "Forgot Password?" or contact your SafetyCulture administration team for assistance.

Once you have activated your account, follow the steps below.



1. Open the SafetyCulture mobile app.
2. Press **Log in**.

3. Enter the email address for your SafetyCulture account.
4. Press **Continue**.

5. Enter your password.
6. Press **Log in with password**.

Your SafetyCulture home

An overview of your day

Say goodbye to scattered to-do lists and endless tabs; your SafetyCulture home screen houses a combined view of everything you need to do. View recent **Heads Ups**, **inspections**, **actions**, **issues**, and **training** in one place.



A detailed to-do list tailored to you

See what you've already started, your communications, and your weekly schedule.



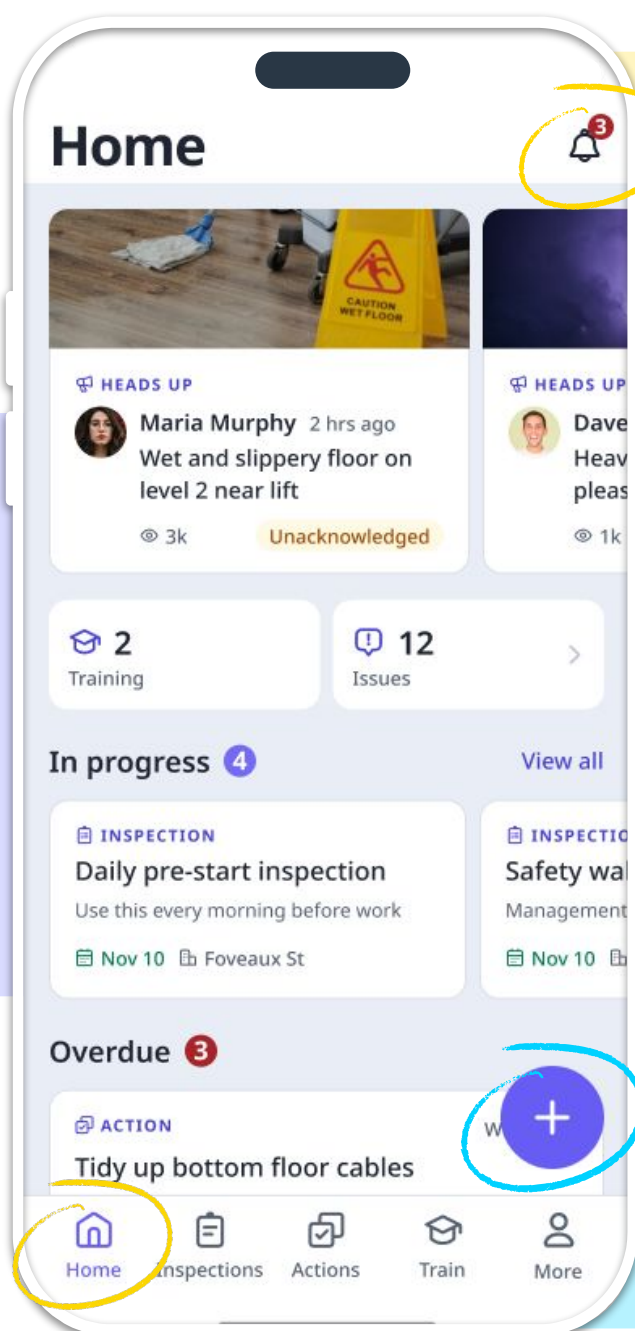
Get notified about important work

Receive notifications for scheduled inspections, action assignments, incident reports, team updates, and more.

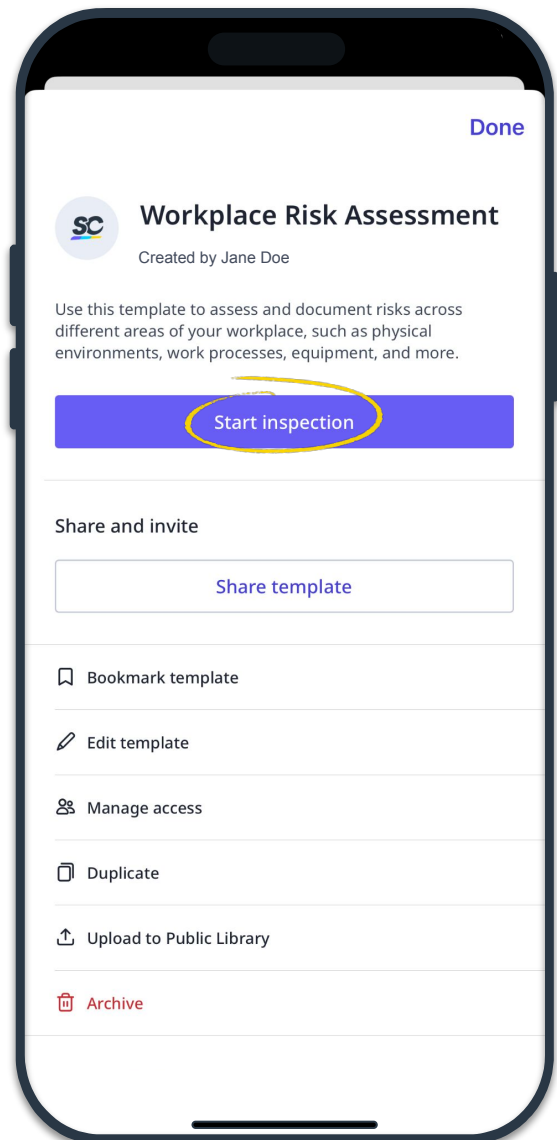
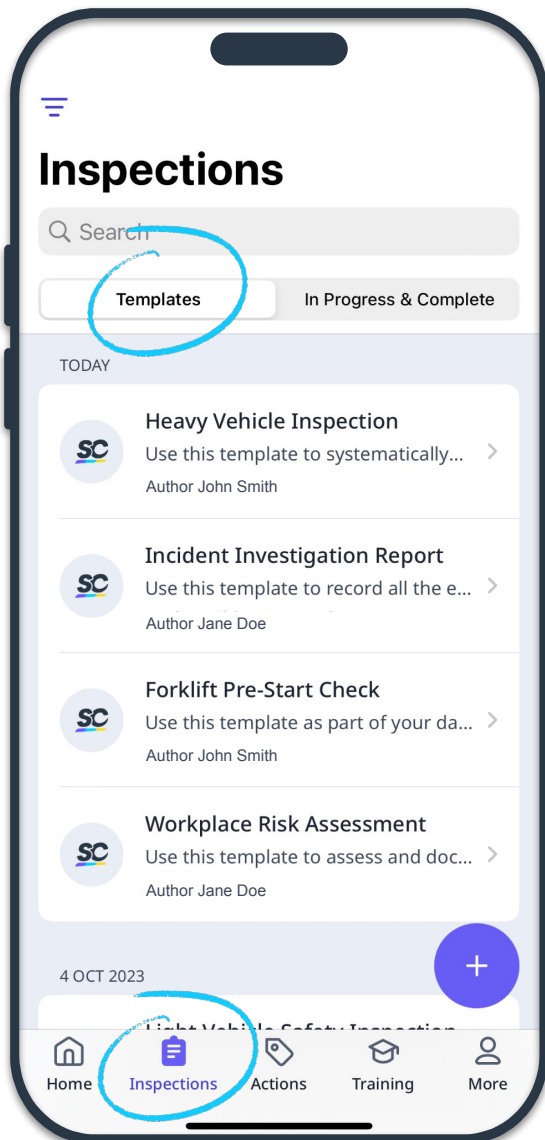


Quick-start your work from anywhere

Take immediate action in just a few clicks. Start inspections, create tasks, and report issues.



Conduct an inspection



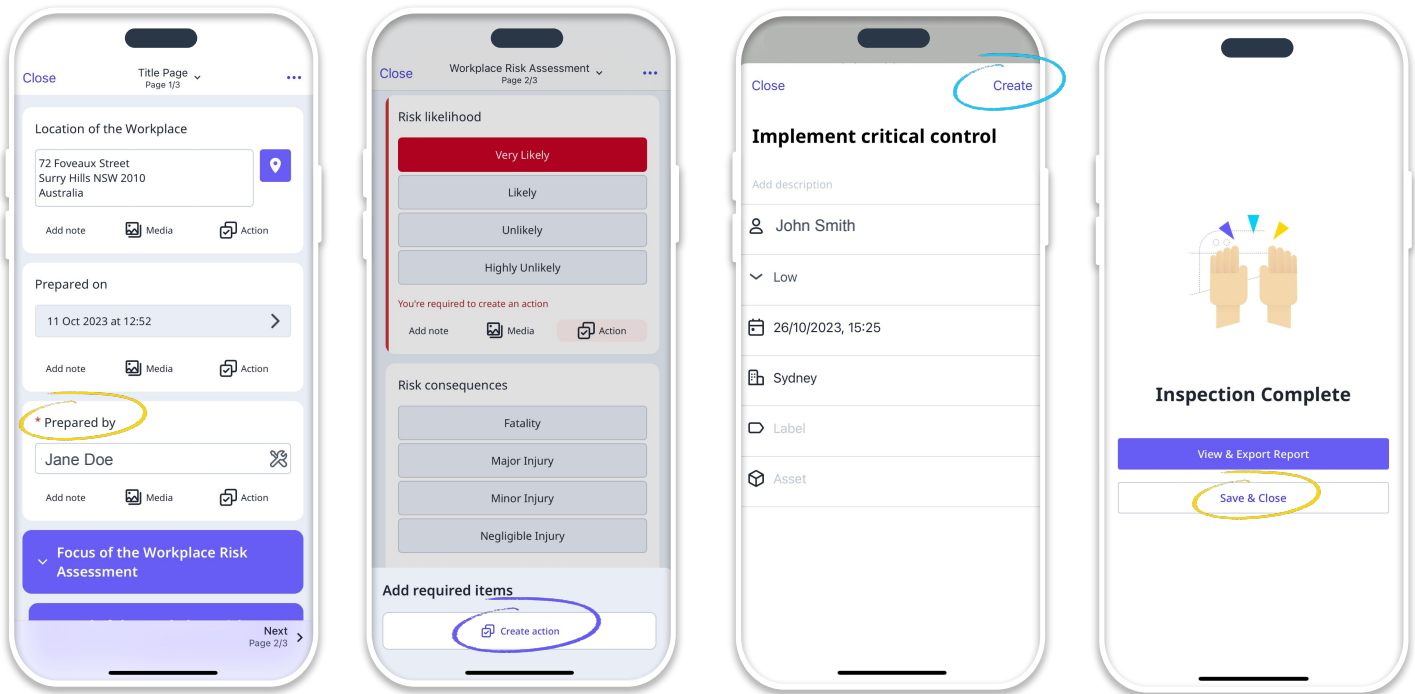
1. Tap **Inspections** at the bottom of your screen.
2. Select the **Templates** tab at the top of your screen.

3. Select the inspection you want to conduct.
4. Tap **Start inspection**

**Steps continued on next page*

Tip: All inspections are started from templates your team have created. If you start an inspection and do not complete it, it will be recorded as an "In progress" inspection. To pick up where you left off, head to the "In Progress & Complete" tab, select the inspection, and tap **Continue inspection**.

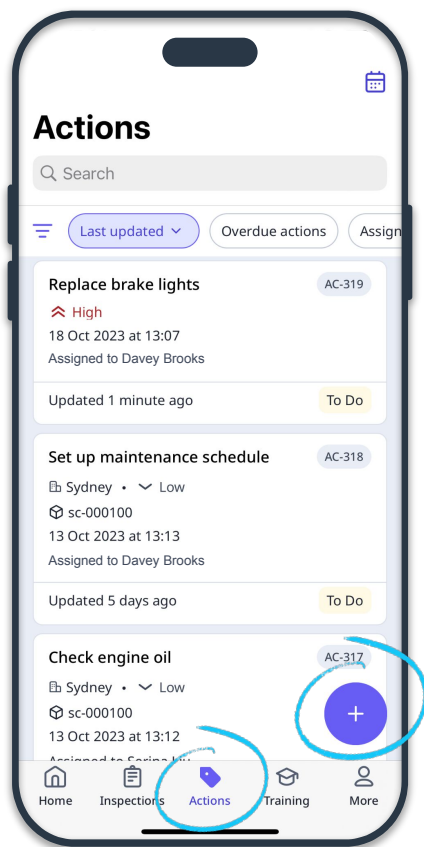
Conduct an Inspection



5. Title page fields will auto-fill with inspection start date, user's name, and GPS coordinates if location services are on.
6. Continue progressing through the inspection and take note of any ***required** questions.
7. If the question requires an action, tap **Create action**.
 - If there are actions created for the question in another inspection, the **Open actions** button will appear to view and link any existing actions.
8. Enter the action details. You must have an action title at a minimum.
9. Click **Create** to raise a to-do item.
10. Once you reach the end of the inspection, click **Complete inspection**.
11. You can review questions that have flagged responses or actions. For each question, you can:
 - Create an action.
 - Tap Skip to dismiss.
12. Select **View & Export Report** to download or email a copy of the inspection report, or **Save & Close** to finish.

Tip: You can add context to your answers with notes and media. For notes, you can type or use the microphone on your keypad. For media, you can take a picture or upload photos/PDFs from your device. You can also add annotations to images by tapping  in the bottom right corner of the image frame.

Create an action

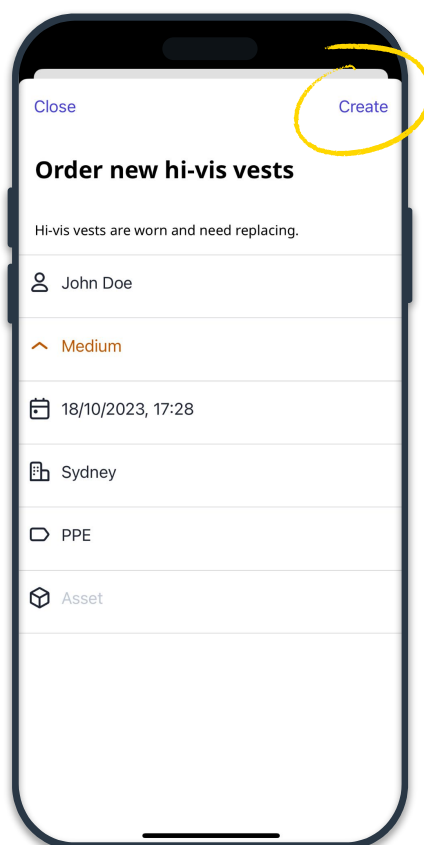


To create an action:

1. Tap **Actions** at the bottom of your screen.
2. Tap **+** at the lower-right corner of your screen.
3. In the pop-up window, enter the action details. You must have an action title at a minimum.
4. Tap **Create** at the upper-right.
5. Fill in the relevant action fields accordingly.



Tip: In the action timeline, you can provide comments and media files. Tap **Details** at the upper-right to provide more details, or change the status of the action.

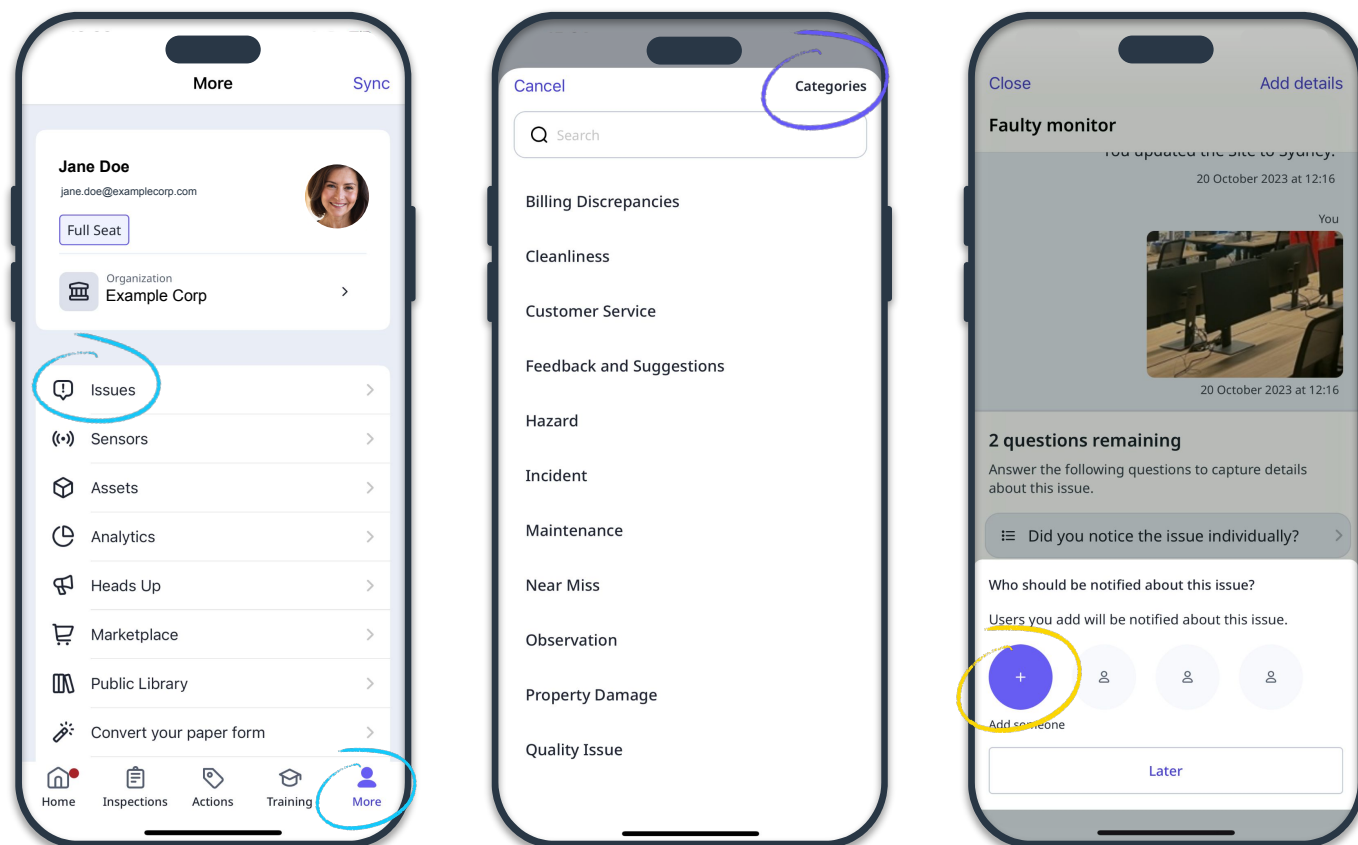


Action fields

Description

Title (required):	A short statement on what needs to be done.
Description	For further context on the task required.
Assignee	The person, or group, being assigned the task. Actions can also be assigned to members external to your organization.
Priority	Used to indicate the relative importance or urgency of a task.
Due date	The action due date and time.
Status	The status of the action, e.g. 'To Do', 'In Progress', 'Can't Do' and 'Complete'.
Site	Used to associate the action with a particular location, project, or team.
Label	Used to categorize and organize tasks.
Asset	Any assets associated with the task.

Report an issue



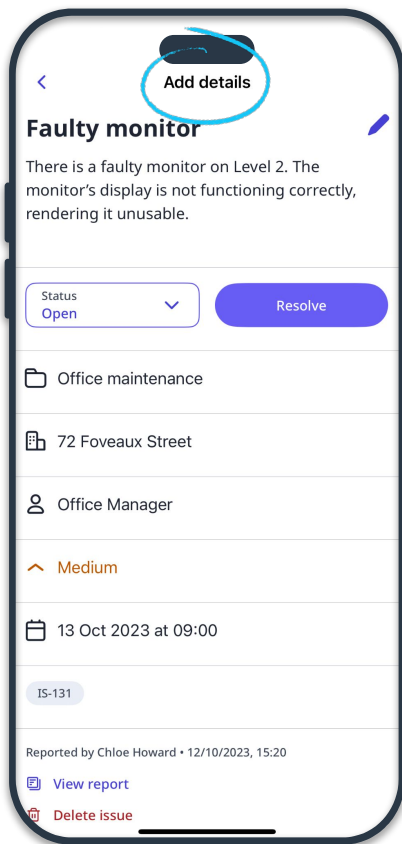
To report an issue:

1. Tap **More** at the bottom of your screen, then select **Issues**.
2. Tap **+** at the lower-right corner of your screen.
3. In the pop-up window, select the issue category.
4. Enter an issue title and description. You can also add a site, images or a video.
5. Tap **Submit**.
6. At the bottom of your screen, tap **+** to notify users or select **Later**.

**Steps continued on next page*

Issue fields	Description
Title (required):	A short statement on what has occurred.
Description	For further context on the reported issue.
Status	The status of the issue e.g. 'Open', 'Resolved'
Category	Used to categorize issues.
Site	Used to associate the issue with a particular location, project or team.
Assignee	The person, or group, being assigned the issue.
Priority	Used to indicate the relative importance or urgency of the issue.

Report an Issue

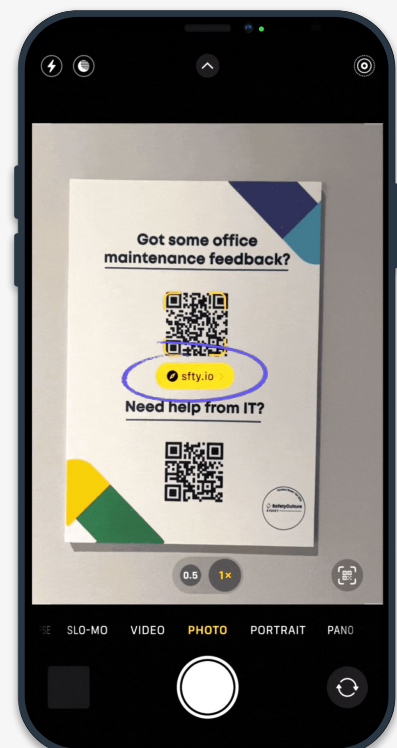


6. At the bottom of your screen, tap **+** to select the users you want to notify or select **Later**.
7. In the issue timeline, you can:
 - See the weather of the issue's location.
 - See the location of the issue.
 - Comment and answer questions.
 - Create actions.
8. Tap **Add details** at the upper-right corner of your screen to change the status, assign the issue, or provide more details.
9. Click back to go to the issue timeline. Tap **+** at the lower-left corner of your screen to:
 - Upload media attachments.
 - Start an inspection.
 - Notify someone.

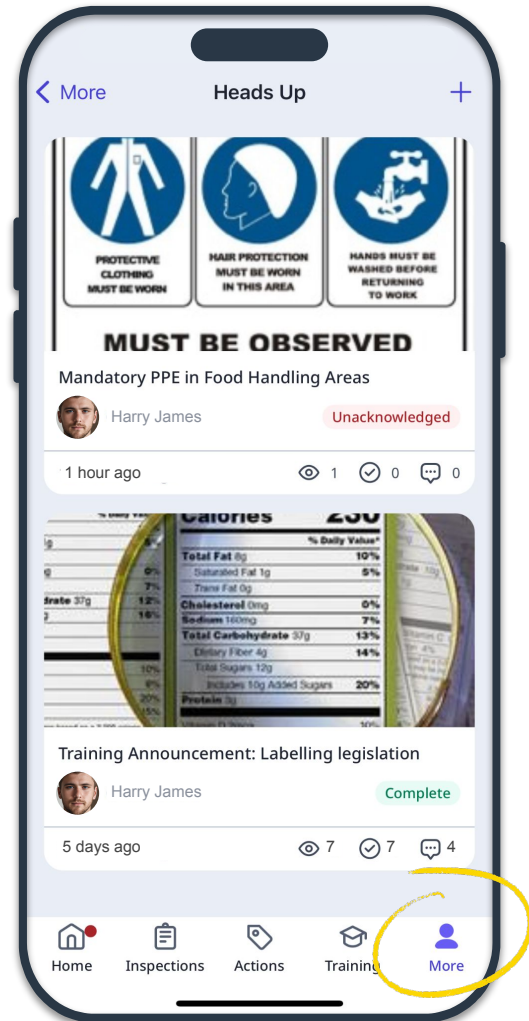
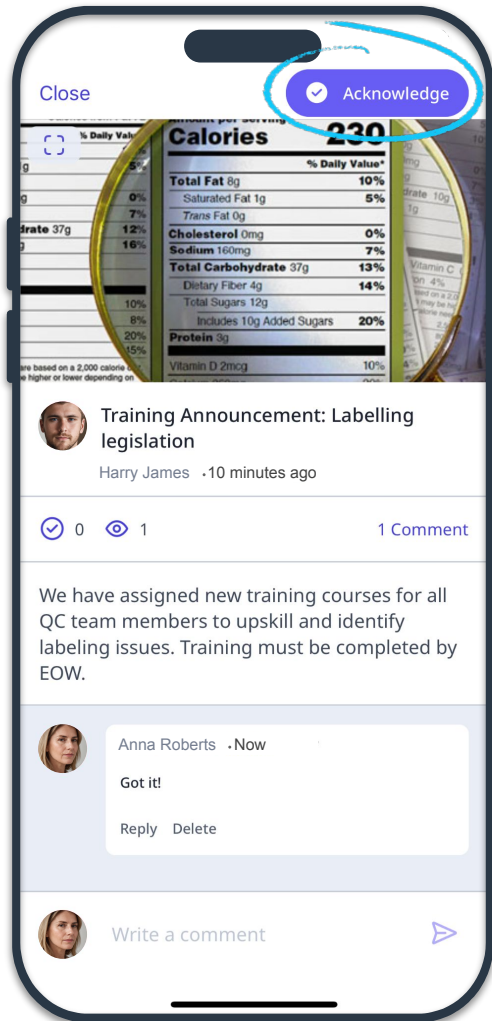
🔍 Notice a QR code on the job?

You can also report issues in SafetyCulture via an issue QR code. To report an issue:

1. Scan the issue QR code.
2. Tap the pop-up link to open a page in your device's default web browser.
3. Select the category of the issue you're reporting.
4. Upload attachments to provide more context, select a site, add a title and a description.
5. Scroll down to answer any custom questions.
6. On the bottom of your screen, enter your name and email or phone number.
7. Tap **Submit**.



View a Heads Up



View a recent Heads Up:

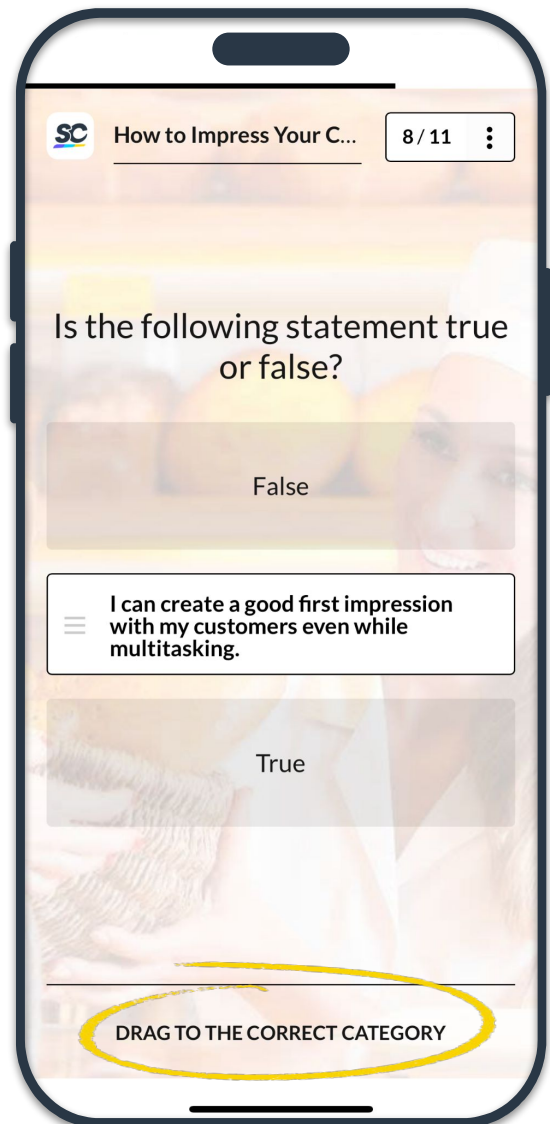
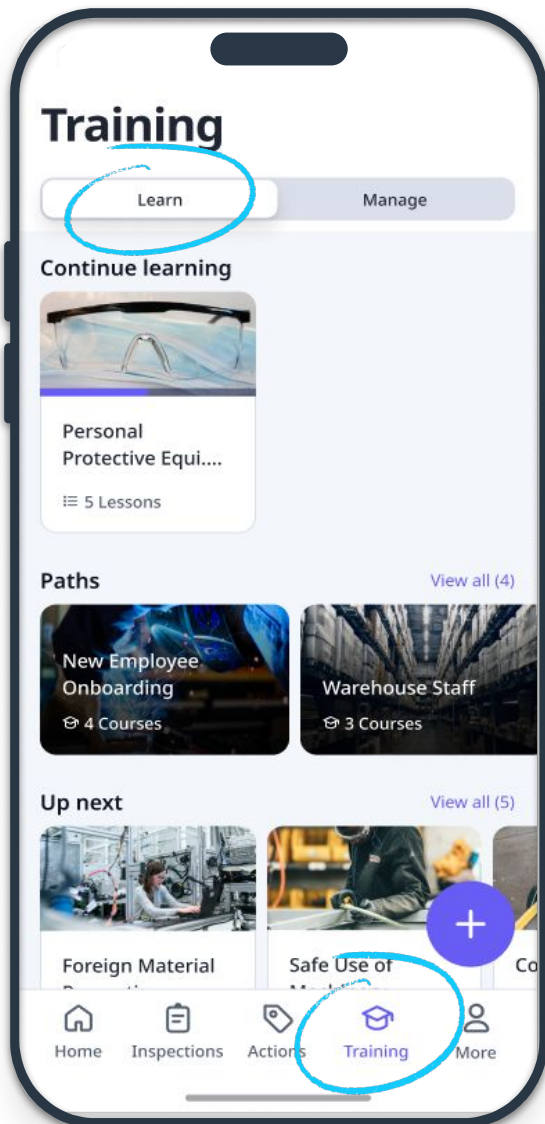
1. Tap **Home** at the bottom of your screen.
2. Heads Ups assigned to you are available at the top of your screen. Tap the Heads Up.
3. Once you've viewed the Heads Up, you may be required to acknowledge this by tapping **Acknowledge**.

View a past Heads Up:

1. Tap **More** at the bottom of your screen.
2. Tap **Heads Up**.
3. Filter and sort the list to find and open the Heads Up.
4. From here you can acknowledge the message or add comments.

Tip: If the author of the Heads Up has comments enabled, you can add a message to the post to learn more, show your engagement, or reply to an existing comment.

Complete training



1. Tap **Training** at the bottom of your screen.
2. Select the **Learn** tab at the top of your screen.
3. Select the course you want to start.

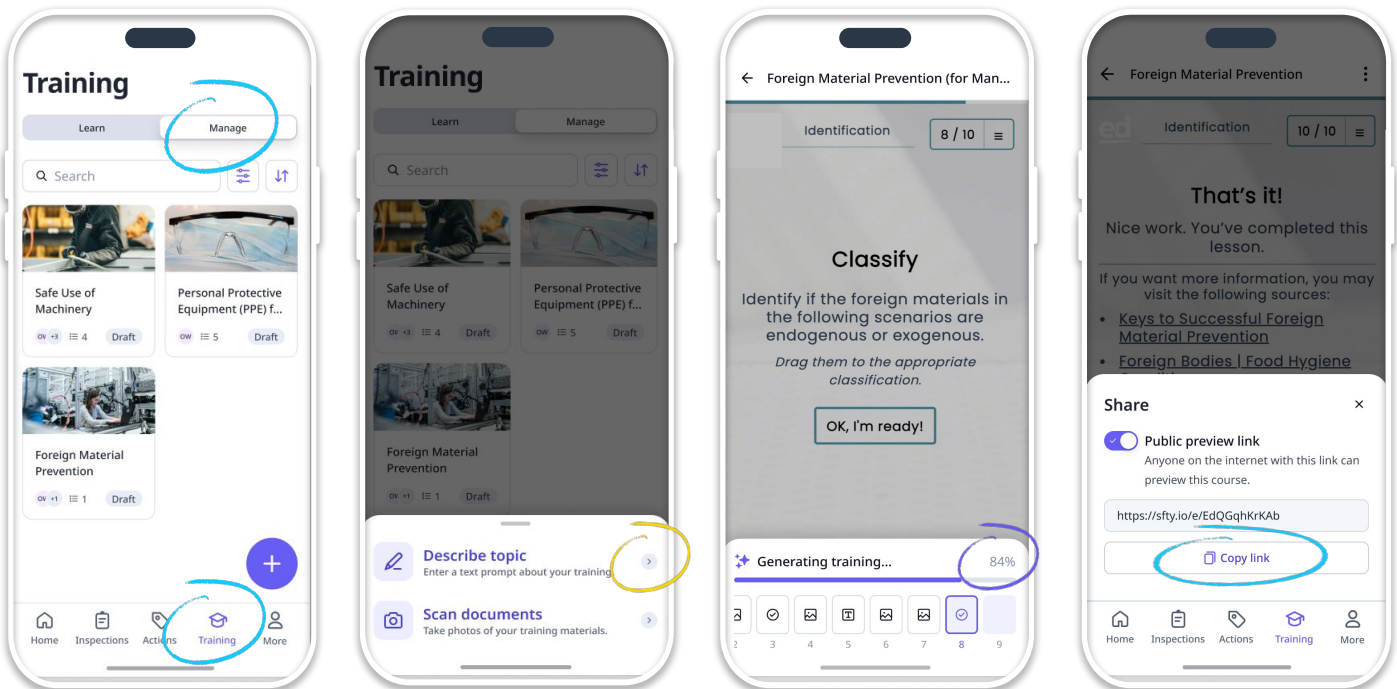
4. Tap **Start Lesson**.
5. Follow the prompts at the bottom of the screen.
6. Return to a previous slide or exit the lesson via the menu in the top right corner of the screen.



Tip: The “Learn” tab displays courses that have been published and shared with you. Any incomplete and in progress courses are found under “Continue Learning” section. “Paths” are courses that have been curated and assigned to you, and “Up Next” suggests courses based on due dates and priority.

Create training

 Can't find the training you need? Why not generate your own course with **Create with AI**.



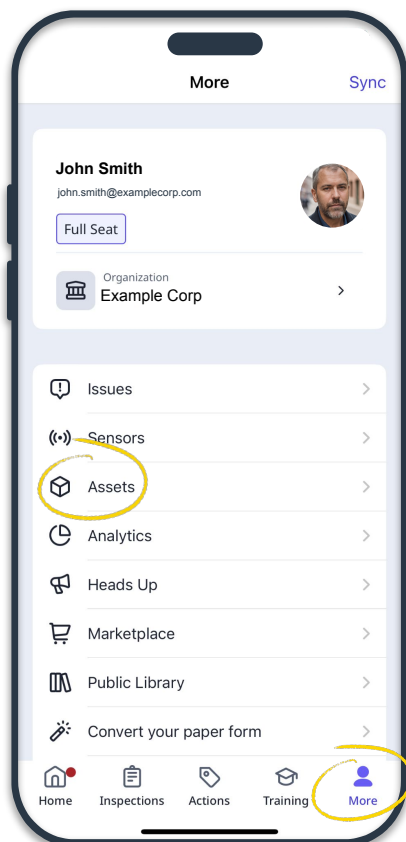
To create new training:

1. Tap **Training** at the bottom of your screen.
2. Select the **Manage** tab.
3. Tap **+** at the lower-right corner of your screen
4. In the pop-up, select how you want to create your course:
 - **Describe topic:** Tap **Enter text prompt** and enter your training topic. Then, tap **Create with AI** to automatically generate a course in seconds.
 - **Scan documents:** Tap **Take photos** and take up to six photos of your training materials. Then, at the upper-right of your screen, tap **Next**, and tap **Done**.
5. While the course gets created, you can either wait on the mobile app or exit, and we'll send you an email once the course is created.
6. Toggle on **Public preview link** to share a preview of your lesson. Tap **Copy link** to share via your chosen communication channel.



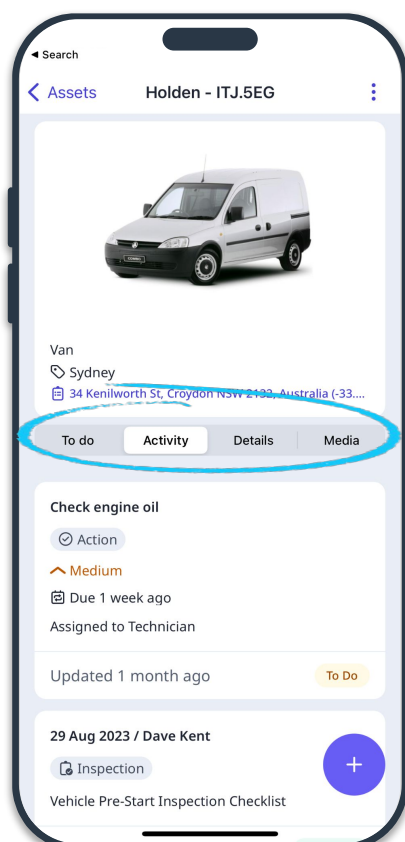
Note: We currently only support editing and publishing courses via the SafetyCulture web app. After creating your course, log in to the web app to make any edits. To publish your course, reach out to your account administration team.

View an **asset** profile



To view an asset profile:

1. Tap **More** at the lower-right corner of your screen.
2. Select **Assets** from the list of options.
3. Find the asset you want to view. You can choose how you want to view your assets by switching between **List**, **Gallery**, and **Map** on the upper-left of your screen.
4. Tap the asset.
5. On the asset profile screen, you'll find the following details and options available to you:
 - **Start an inspection & create an action:** Tap + to initiate inspections and actions with pre-filled asset and site information.
 - **To do:** View tasks related to the asset, including scheduled inspections, open actions, and in-progress inspections.
 - **Activity:** See a record of activities like inspections and actions associated with the asset.
 - **Telematic Readings:** Access odometer readings, engine hours, temperature, and GPS coordinates (only viewable if your SafetyCulture organization has been integrated with other asset management systems).
 - **Media:** Access documents and images related to the asset.



🔍 Notice a QR code on an asset?

Simply scan the QR code to be taken straight to the asset profile on the SafetyCulture mobile app.



App settings

Manual syncing

Syncing ensures that the information you access on your account is always up to date, no matter where you log in from.

To perform a manual sync, tap **Sync** on the upper-right corner of the **More** screen.

Live chat

Any questions? Need assistance?

Tap **More** at the lower-right corner of your screen, then tap **Live chat with support** to get real-time assistance from our experts!

Settings

Photo settings

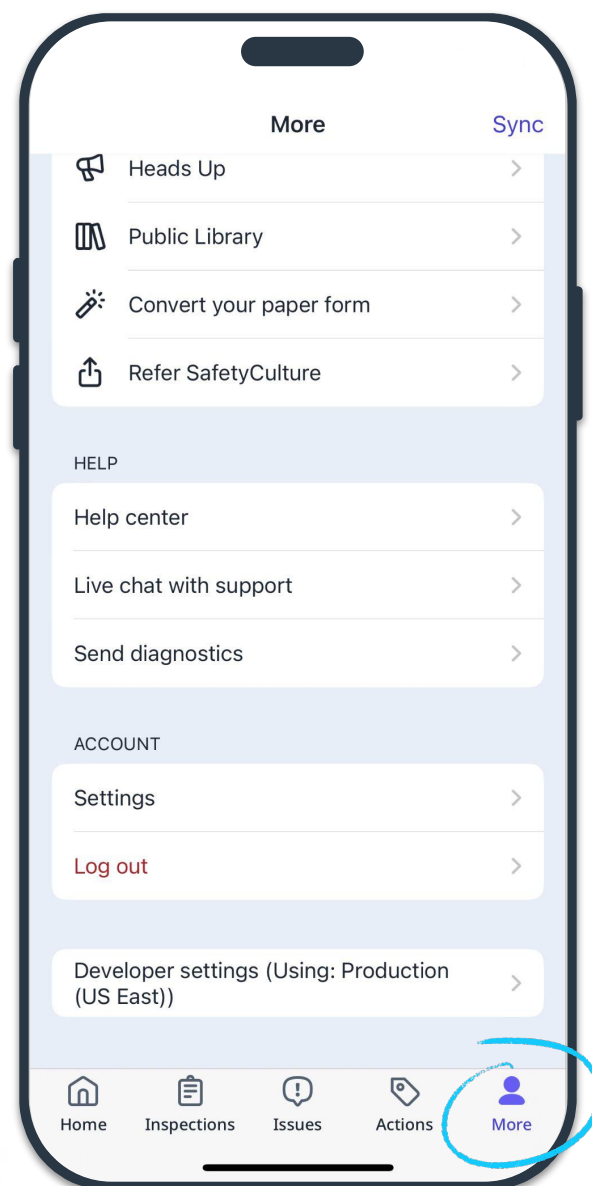
Do you want to automatically save all photos on your camera? Do you want photos to be automatically time-stamped?

Change the settings by going to **Settings**, then scroll down to the **Photo Options** section.

Notification settings

It is important to keep up to date with the latest information and receive reminders of tasks to be completed.

To change the notification settings, go to **Settings**, then scroll to the **Notifications** section.



Work offline



Don't have access to an internet connection when doing your work?

With SafetyCulture, you can conduct inspections and create actions via the mobile app even when your device is offline.

The screenshot shows the SafetyCulture mobile app interface. At the top, there's a status bar with 'SOS' and a signal strength indicator. Below that, a header bar contains 'Close', 'Audit', 'Page 2/2 - Score 2/28 (7.1%)', and a menu icon. The main content area displays two inspection questions. The first question is '1.9 Is the machine/plant located out of high volume traffic areas, while still allowing access for plant to load and unload if required?'. It has three response buttons: 'Safe' (green), 'At Risk' (light blue), and 'N/A' (light blue). Below the buttons are icons for 'Add note', 'Media', and 'Action'. The second question is '1.10 Are all instruments and gauges functional and in good working order?'. It has four response buttons: 'Satisfactory' (light blue), 'Non-Compliant' (light blue), 'Improvement' (yellow), and 'Not-applicable' (light blue). Below these buttons are also icons for 'Add note', 'Media', and 'Action'. At the bottom left, there is a 'Back' button and 'Page 1/2'.

Best practices for conducting inspections offline:

Before the inspection

- Update the SafetyCulture mobile app
- Download templates and inspections
 - Perform a manual sync to download all templates available to you.
 - Briefly open the inspections you need in edit mode to download them.
- Store copies of your inspection photos

During the inspection

- Save your changes
 - If you need to exit the mobile app, save your inspection progress by tapping **Back** for Android or **Close** for iOS devices.

After the inspection

- Sync your inspections
 - When in a stable internet area, manually sync your inspection data.
 - If sync issues occur, try force closing and reopening the mobile app, then manually sync.
- Sync your actions
 - To sync offline-created actions, go to the **Actions** tab and swipe down on the screen.

SafetyCulture

Additional resources

Join us for our bootcamps and training webinars at:
<https://safetyculture.com/events-and-webinars/>

Access the SafetyCulture Knowledge Base here:
<https://help.safetyculture.com/en-US/>

SafetyCulture Support

Our Support team are available to help you 24 hours a day, Monday-Friday, with limited support over the weekend.

Start a live chat with our team in-app or via our website :
www.safetyculture.com

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