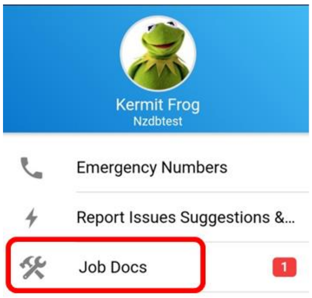
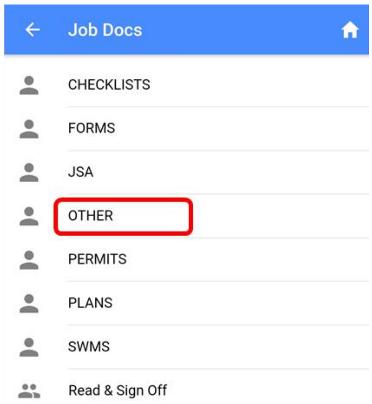
From the Main Menu select:

- Job Docs
- Click on the required sub-menu.

In the example below a Job Doc-Other has been created, this has an additional field to choose the type of form to be completed.

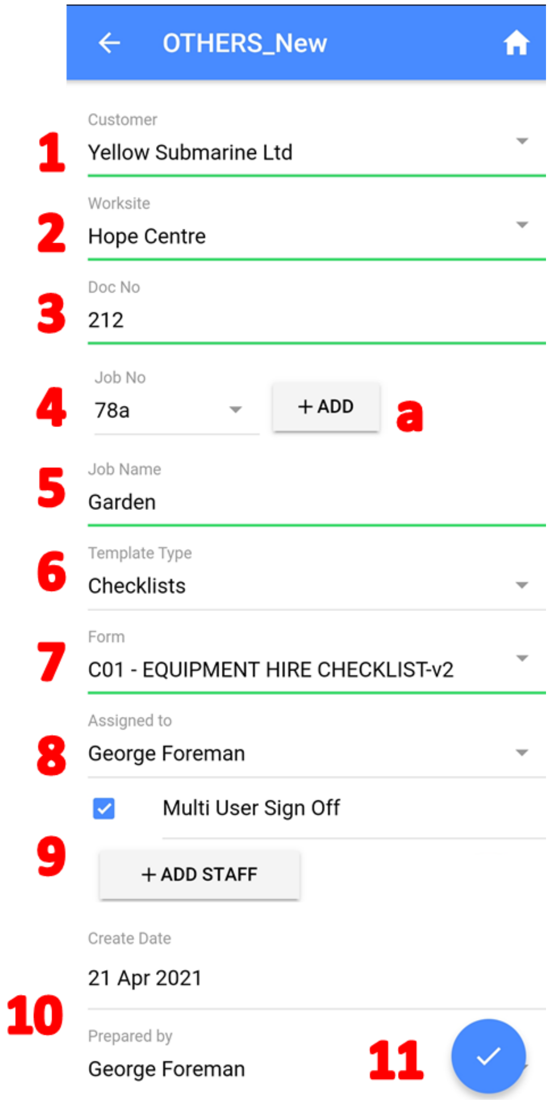


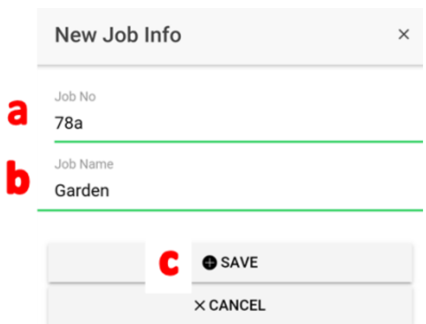




## A. Create New Job Doc – the same process applies to JSA, SWMS & Other

Click + to create a new Job Doc in any of the menus:

1. Select the Customer or add a new one as per section G.
2. Select the Worksite or add a new one as per section G.
   When the Customer has only one worksite this will automatically populated.
3. The Doc No will auto populate.
4. Select the Job No or +ADD to create a new one – see below.
5. Job Name will populate according to the Job No selected.
6. Select the type of template to be completed.
   ***Note:*** this field only displays in Job Docs/Other.
   If you are using States & Division in Staff/Personal Details this will limit the forms displayed.
7. Select the form to be completed.
8. Select who will be in charge of the Job Doc – this will default to the person logged on.
9. Tick if Multi User Sign Off is required & click **+ADD STAFF** – see below.
10. Create Date & Prepared by will auto populate.
11. Click ✓ to save and when the Job Doc is assigned to you it will open ready for completion – section C below.

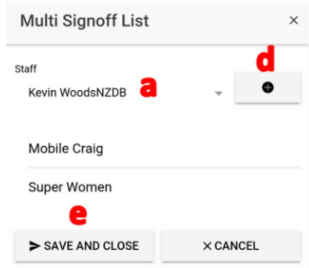


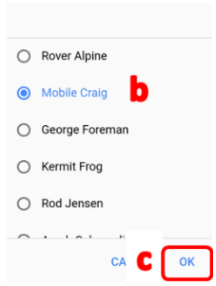




4. To create a new Job No:
   a. Type in a Job No.
   b. Type in a Job Name.
   c. Click Save.

If you have Simpro Configured see Get Jobs.
Contact support@safetyminder.co if you wish to pull jobs details from Simpro

9. To add staff for multi sign off:
    a. Tap in the Staff field.
    b. Select Staff member to add
    c. Click OK
    d. Click **+**
    e. Once all staff have been added click **▶SAVE AND CLOSE**



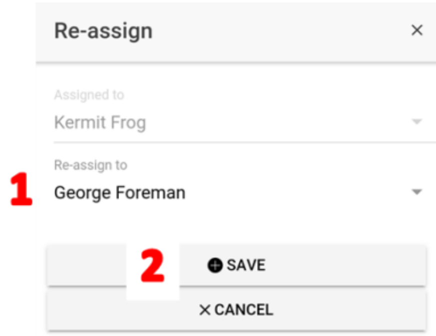

## B. Re-assign Job Doc

On all of the tabs is the option to Re-assign Job Doc.

1. Select the staff member to re-assign to.

2. Click SAVE.

This will move it from your task list to the user selected.



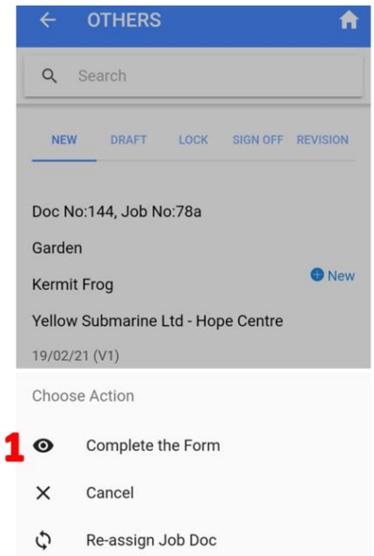

## C. Complete the Form

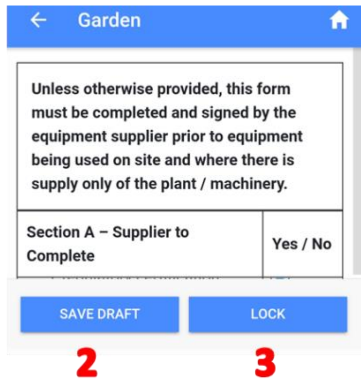
From the NEW & DRAFT you can now fill in the form:

1. Select **Complete the Form** or continue from above step A#11.
   Work through and complete the form.

2. Click **SAVE DRAFT** keeps the form on the Draft Tab.

3. Click **LOCK** which will save and open the form ready for signatures.




4. Click **View Form.**

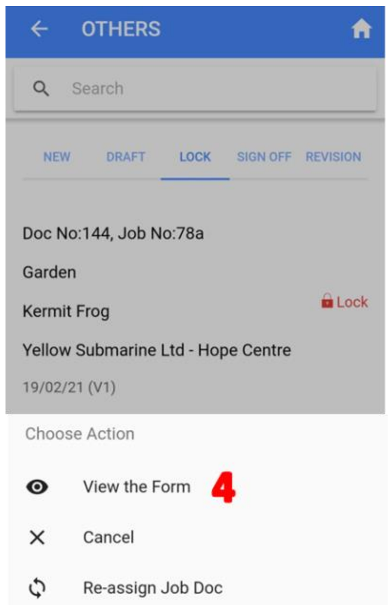
5. To amend the form click **MAKE CHANGES**. This takes you back to the draft tab.

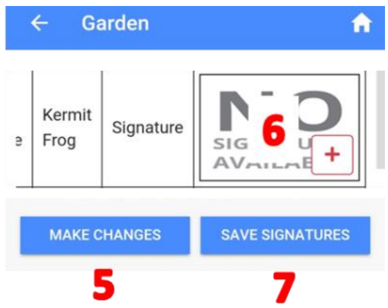
6. If everything is okay click the plus in the signature box & **+ADD ITEMS** for more signatures as required.

7. Click **SAVE SIGNATURES**.

The Job Doc will now close and move the SIGN OFF tab.

***See notes below regarding signatures.***



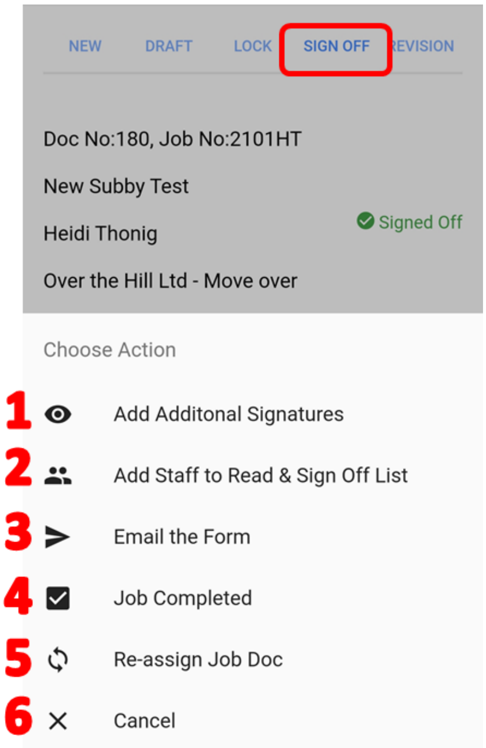



## D. SIGN OFF & REVISION Tab

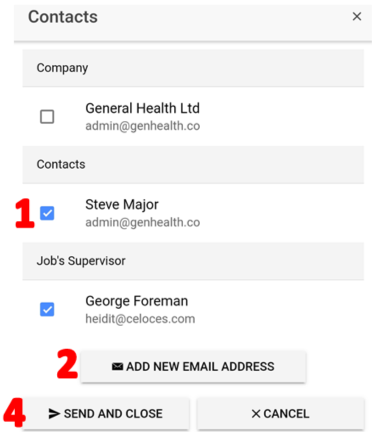
**From the Sign Off tab you can do the following:**

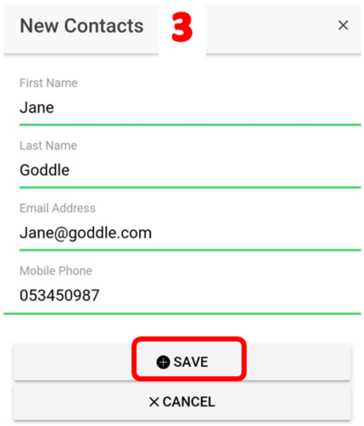
1. Add more signatures to the form as per #6 above and notes below.
2. For Multi Sign Off Job Docs view or Add Staff on the Read & Sign Off List.
3. Allows you to email the form - see E below.
4. When the job is finished you can archive the Job Doc so that no longer shows on the Mobile App – see F below.
5. Re-Assign the job as per B above.
6. Cancel to return to the list of Job Docs.

**The Revision Tab is for forms that have 2 parts e.g. signing into a confined space and then out again at the end of the day or access permits that are issued and then completed/cancelled.**




## E. Email the Form



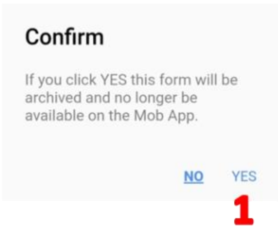

The contacts for this customer will display along with the job supervisor and project managers/supervisors:

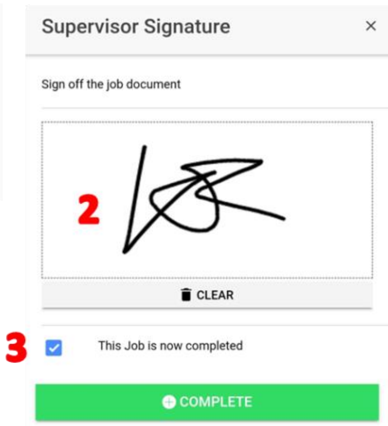
1. Select those you wish to send the job doc to.
2. If required lick **+ADD NEW EMAIL ADDRESS**.
3. Complete the fields and **SAVE**. This will add a new contact to the customers details. Last Name & Mobile phone are optional.
4. Click **➤ SEND AND CLOSE**.

## F. Job Completed

***NOTE: Once this process is completed the Job Doc will no longer be available on the Mobile App:***

1. Click YES to the confirmation message.
2. Sign the Panel.
3. Tick the “This Job is now completed” box.
4. Click **+COMPLETE**

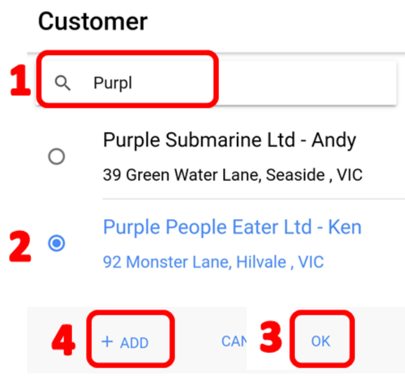


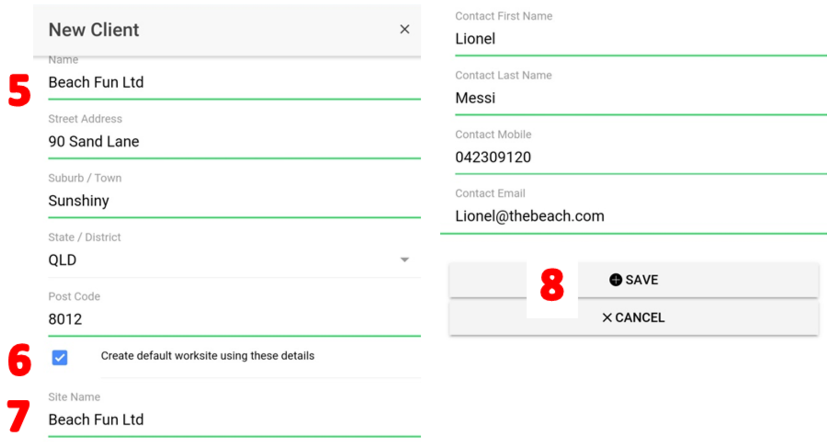



## G. Add Customer & Worksite

After you click on select ▼ use the search field to find the customer:

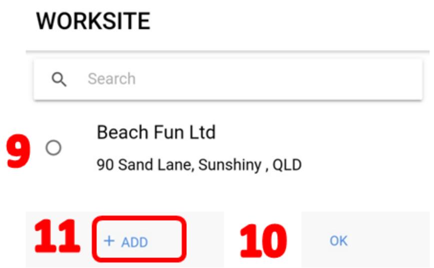
1. Start typing the name of the customer.
2. If you find the right customer select it.
3. Click **OK.**
4. If the required customer is not in the list click **+ADD** to create a new one.

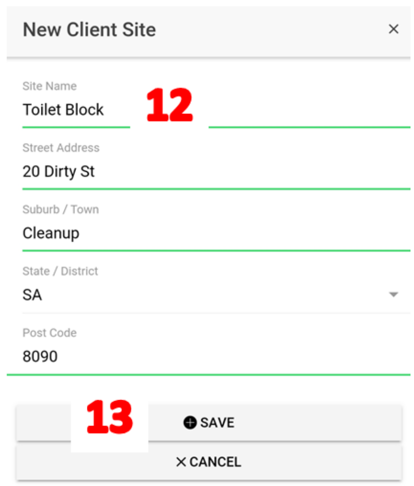


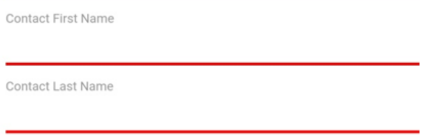




5. Complete the customer details
6. Create default worksite using these details will be tick. Untick if not required. You will then need to manually add a worksite as per below
7. The Site Name will be the same as the company name, change as required. Complete the remaining details.
8. CLICK **+SAVE** .

9. Select the worksite.
10. Click **OK** or
11. Click **+ ADD** to create a new one.
12. Complete the details.
13. CLICK **+SAVE** .




**NOTE:** Fields with red lines under them are compulsary.

## NOTES:

- Job Docs can also be created, filled in and assigned from the web app. These will go straight to the Draft Tab.
- Depending on the form setup Signatures are either active on the Draft or Lock tab.
- If they are active on the Draft tab then additional signatures cannot be added on the LOCK or SIGN OFF tab.
- Remember to check if a Template Type should be used in a specific register e.g. P&E Inspections as some of the data may not populate if you create Job Docs/Other.

There are two different types of signature boxes as show.

1. Add your signature on screen.

2. Tick the confirmation box.

3. Click **SAVE**.
   ***NOTE:*** This will only become active after 1 & 2 have been completed.

4. For the next staff member +ADD ITEM .