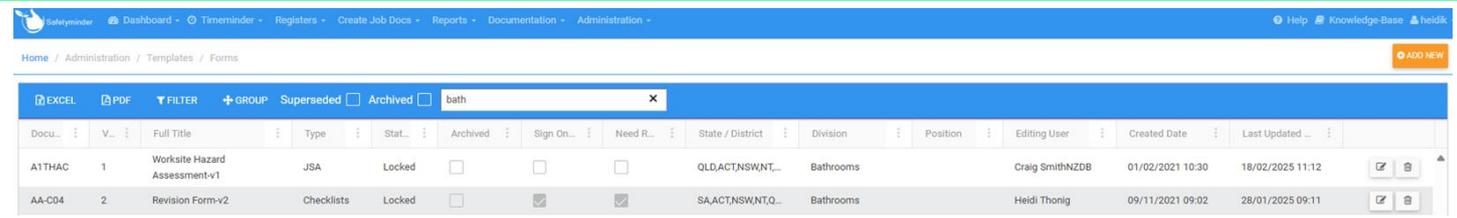This is where you will build and edit your form templates that will be used in Jobs Docs.
From Administration/Template/Forms:

- Double click or select the Edit icon to update any existing template form.
- OR Click **+ADD NEW** to create a new template form.

Use the filter and search box to find specific entries.

| Docu... | V... | Full Title | Type | Stat... | Archived | Sign On... | Need R... | State / District | Division | Position | Editing User | Created Date | Last Updated ... | | |
|---------|------|-----------|------|---------|----------|-----------|-----------|------------------|----------|----------|--------------|--------------|------------------|--|--|
| A1THAC | 1 | Worksite Hazard Assessment-v1 | JSA | Locked | ☐ | ☐ | ☐ | QLD,ACT,NSW,NT,... | Bathrooms | | Craig SmithNZDB | 01/02/2021 10:30 | 18/02/2025 11:12 | ✏ | 🗑 |
| AA-C04 | 2 | Revision Form-v2 | Checklists | Locked | ☐ | ☑ | ☑ | SA,ACT,NSW,NT,Q... | Bathrooms | | Heidi Thonig | 09/11/2021 09:02 | 28/01/2025 09:11 | ✏ | 🗑 |

## Template Form Info Page

1. Type in a Title.
2. Type in a Document ID.
3. The Version No will auto populate.
4. The Template Status will be "Creating" until the form is **locked.**
5. Select the Template Type. You can add to these under Administration/Templates/Template Type.
   NOTE:
6. Select the Report Paper Type.
7. Tick if this Template needs to be used by a Subcontractor.
8. **Need Revision** is ticked for forms that have 2 parts e.g. permits where you need to sign workers on and off, or complete questions once a task is finished.
9. **Documentation Only** is used for Work Instructions-Policies-Procedures.
   These are sent out from **Registers/Document Distribution/Work Instruction-Work Policy Register** for sign off.
   **NOTE**: they are not used in Create Job Docs.
10. Archive Template is used when a template form will no longer be used for Job Docs.
11. Sign on Lock is generally used for SWMS, where workers will either sign on the Supervisors device and be sent out for Multi Sign Off.
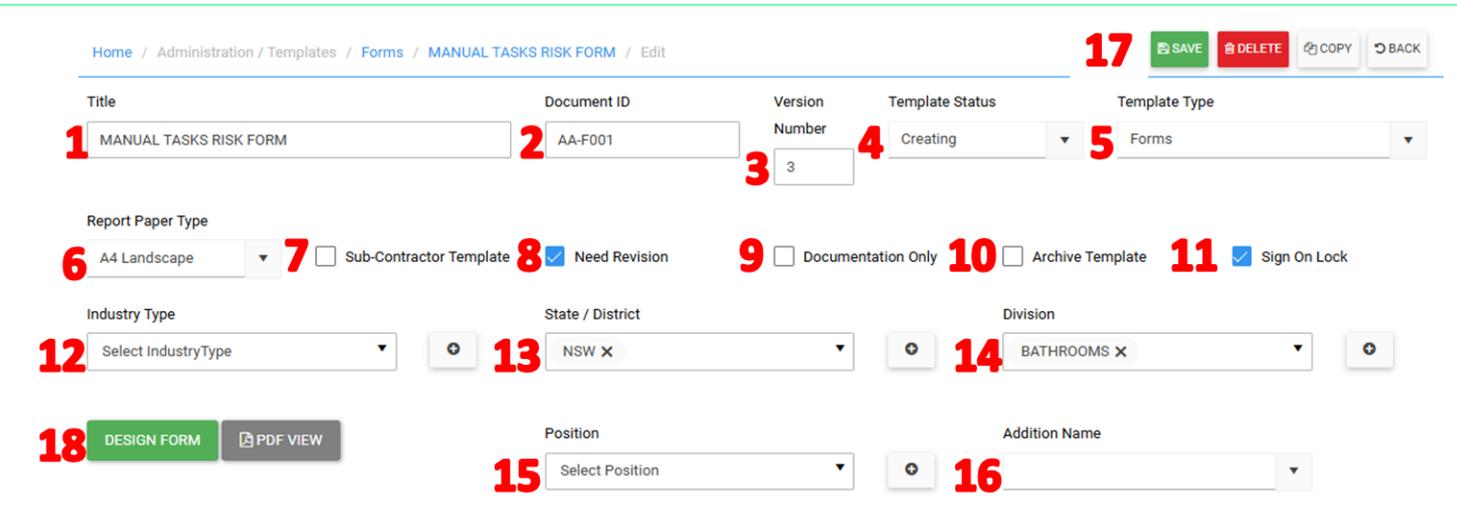
12. Select an industry type this template will apply to. You can use the ⊕ button to add new **Industry Types.**
13. When States is turned on in your database you can select multiple options to limit the templates that are shown to individual staff e.g. if a form has NSW selected then only staff with NSW selected in their staff details will see this template form in their selection list.
14. When divisions are selected then only staff with the same divisions set in their details will be able to see this template form in the selection list. Multiple divisions can be selected.
15. Select Positions as required.
16. This field is used to push back extra details to SIMPRO in the pdf name.
17. Click 🖫 **SAVE** at this stage to save the form information.
18. Click **DESIGN FORM** to create or **edit the form**.

At any stage you can click SAVE, DELETE, or BACK.

## Return form to Edit Mode

| Status | ⋮ | Editing User | ⋮ |
|---|---|---|---|
| Creating | | Heidi Thonig | |

If you are logged out while in a template form, close the tab or copy it, then this will lock the form to your user and no one else can open it.

To return it to edit mode open the form and click ↻BACK.

## Template Types

The list is in:
Administration/Templates/Template Type

There are standard template types that cannot be edited or deleted, they are used in specific job doc menus or registers as noted in the description.

Forms used in registers have specific text widgets to pull data from them contact support@safetyminder.co for more info.



| Title | Used In |
|---|---|
| AA New SMDEMO | |
| Audit Report Internal | Registers/Administrative Registers/Internal Audit Reports |
| Checklists | Create Job Docs/Checklists |
| Competency Checks | Registers/Training etc/Skills & Competencies Register |
| Drug & Alcohol Screening | Registers/Injury & Health Managemen/ Drug & Alcohol Screening |
| Fitness & Welfare Checks | Registers/Injury & Health Management/Fitness & Welfare Checks |

## NOTES:

- Click this link for help with **Template Editing**.
- Use Create Job Docs/Template Testing to run through the workflow of your document before locking them.
- Once you are happy with the function and layout you can  **Lock, Copy,  and create New Versions**