

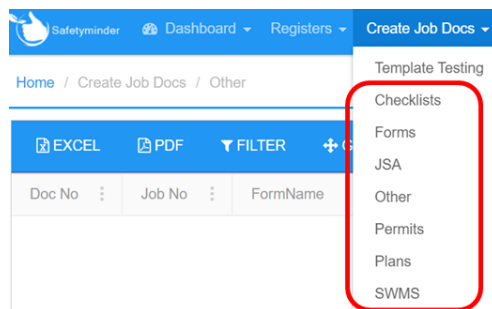


A. Create Job Doc

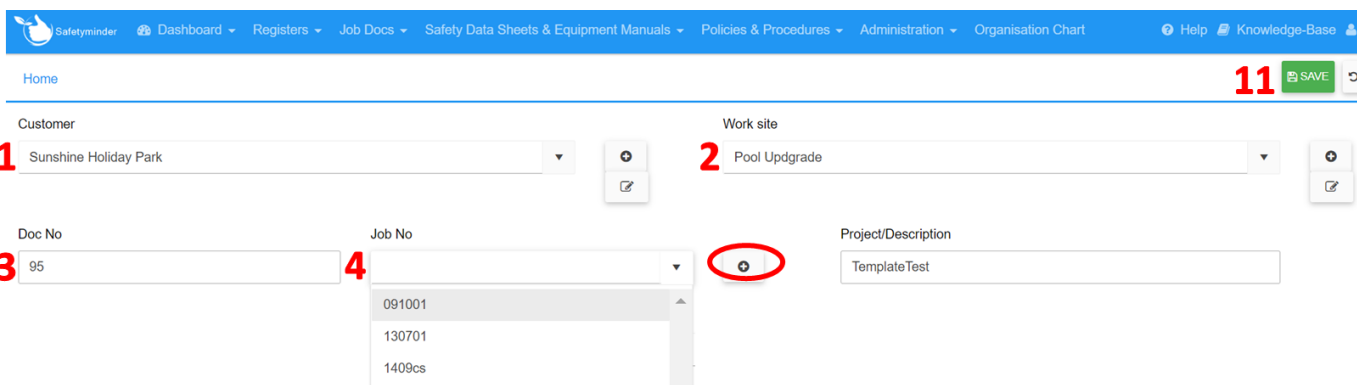
Once you have created [Customers](#) and [Forms](#) that are locked, you can create and assign job docs.

From the Create Job Docs menu select any of the options shown.

Click **+ADD NEW**



1. Select a Customer from the list or click **+** to add a new one.
2. Select the Work Site from the list or click **+** to add a new one.
3. The Doc No will automatically populate.
4. Select the Job No or click **+** to add a new one.



Add New Item

ClientSiteID
Pool Upgrade

Job No: 8923 Job Name: Pool House

Sub-Contractors
SAILING HQ x

c **SAVE** CANCEL

4. Add New Job No:
 - a. Type in a Job No and Name
 - b. Select all of your Sub-Contractor companies that will be working on this job.
 - c. Click **SAVE**

5. Select who will be in charge at the job.
6. Prepared By will default to the user logged on.
7. Creation Date will default with today's date, it can be changed if required.
8. Tick **Multi Sign OFF** & add staff to the grid.
This will distributed the job doc to individual mobiles for sign off once completed on the mobile app.
9. Signed off by Site Supervisor will populate when the Job Doc is completed in the Mobile App.
10. For "Create Other" you will need to first select from the Type list, then choose the required form.
For those in the menu list, you will just need to choose a Template. See NOTES re selection list.
11. Click **SAVE** (see image above).

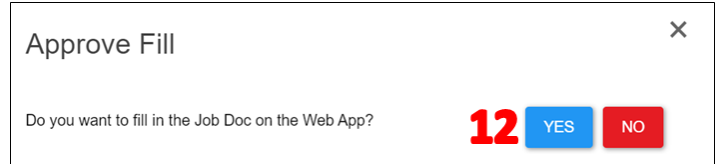
Assigned To: **5** Kermit Frog PreparedBy: **6** Heidi Thonig CreationDate: **7** 24/04/2021

8 MultiSignOff **9** Signed off by Site Supervisor **10** Template Type: Checklists Template: C01 - EQUIPMENT HIRE CHECKLIST-v2

Staff: Rod Jensen

Staff	Viewed On App	Signed Off
George Foreman	<input type="checkbox"/>	<input type="checkbox"/>
Rod Jensen	<input type="checkbox"/>	<input type="checkbox"/>

12. If you wish to fill out the form on the Web App click **YES** – this will allow you to pre-populate any required information before sending the form out to the Mob App.
Clicking **NO** will send a blank form out to the team.



Approve Fill

Do you want to fill in the Job Doc on the Web App?

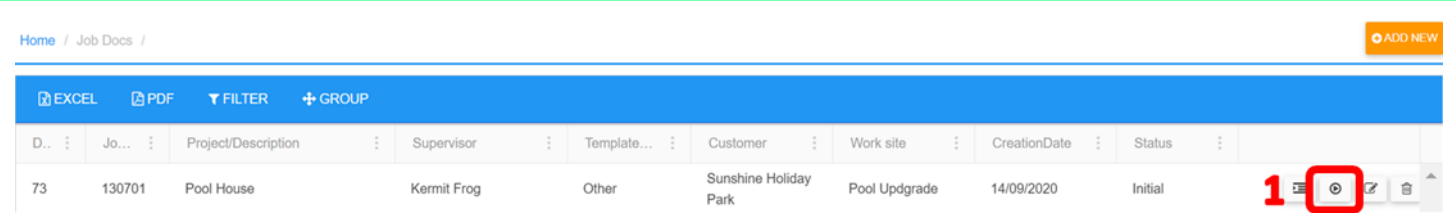
12 YES NO

B. Add Steps

1. Clicking the “Steps” button will open the form in edit mode allowing you to include additional steps.
[Steps - adding to SWMS - Safetyfinder](#)

C. Complete Initial Setup

1. Clicking the “Initial” button will open the form in the Web App for completion.



Home / Job Docs / ADD NEW

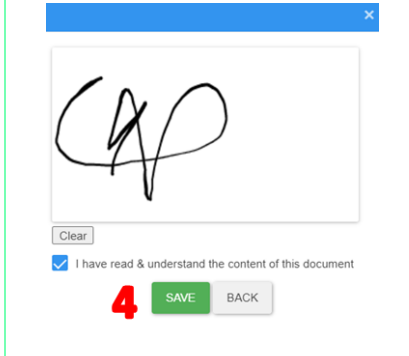
EXCEL PDF FILTER GROUP

D.	Jo...	Project/Description	Supervisor	Template...	Customer	Work site	CreationDate	Status
73	130701	Pool House	Kermit Frog	Other	Sunshine Holiday Park	Pool Upgrade	14/09/2020	Initial

1 [Initial button highlighted]

2. Scroll through and complete the information as required and when finished click **Submit**. This will send the form to the Assigned person in #5 above.
3. If the Job Doc does not need to be sent out to the mobile app then click SIGN OFF.
4. Use the mouse to add your signature, tick the box and click **SIGN OFF**. This will send it straight to Completed Jobs.

Click this link for creating [Draft Job Docs - Safetyfinder](#)



Clear

I have read & understand the content of this document

4 SAVE BACK

Mark all PPE required for this task – ensure available prior to commencing work

P
P
E

1	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	7	<input type="checkbox"/>	8	<input checked="" type="checkbox"/>	9	<input type="checkbox"/>	10	<input type="checkbox"/>	11	<input type="checkbox"/>	12	<input type="checkbox"/>
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2 SUBMIT CREATE DRAFT SIGN OFF **3**

The Job Doc will need to be completed, locked and signed off in the Mobile App under [Job Docs](#).

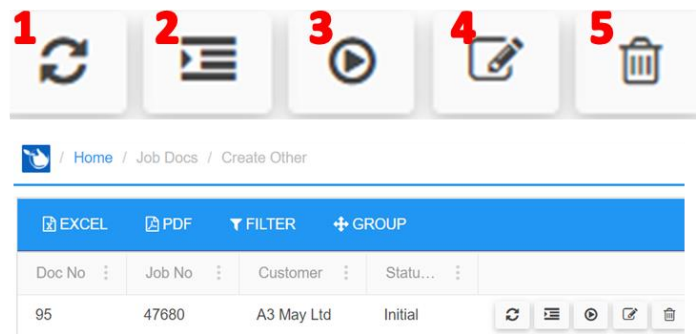
NOTES:

- If States or Divisions have been set in the [Staff-Personal Details](#) then only [Template/Forms](#) that have the same States and/or Divisions set will show in #10 above.
- When you select “[Email the Form](#)” (section E) from the mobile app Safetyfinder will send a copy of the Job Doc to the people you select.
- Template Testing is for testing Template/Forms that have not been locked yet to make sure they work. For forms that are used inside registers e.g. P&E Inspections, not all the functions will work here.
- Under Create Job Docs/Other you are able to select the remaining template types to create job docs for. Predominately the other types should be used inside specific registers e.g. P&E Inspections, Fitness & Welfare Checks, Audit Report Internal etc.

NOTES:

Icons Explained:

1. Reassign – see below
2. Add [Steps](#) to Job Doc SWMS.
3. Fill in the Job doc on Web App – when you click YES after saving the Job Doc – Step #12.
4. Edit – change the supervisor or customer.
5. Delete the Job Doc.



1. Select the person to Reassign the Job Doc to.
2. Click [SAVE](#)

Edit Item ×

Assigned To: George Foreman

Reassign To: Kermit Frog **1**

2 [SAVE](#) [CANCEL](#)

