



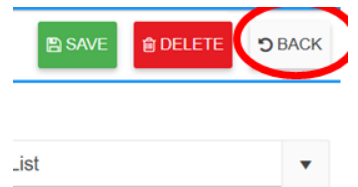
This process is used to lock forms and keep track of versions.

1. To view superseded forms tick the box as shown – this relates to former versions of a form.
2. Type in the search box to narrow down the forms displayed.
3. There are four template statuses:
  - a. Creating – in this state you can edit and refine your template They can be tested end to end in: [Job Docs/Template Testing](#).
  - b. Locked – these forms can be used in the relevant Job Docs menu or other registers e.g. P&E Inspection.
  - c. Superseded – once you have created and locked a new version of a form then the previous one will be marked as superseded. As a default these will not show in the grid.
  - d. For archived forms – see section B.

Home / Administration / Templates / Forms

Document ID	V...	Full Title	Type	Status	Archived	Editing User
AA-DA001	1	Drug Alcohol Testing-v1	Drug & Alcohol Scree	Locked	<input type="checkbox"/>	
AA-DA001	2	Drug Alcohol Testing-v2	Drug & Alcohol Scree	Creating	<input type="checkbox"/>	
AA-DA002	1	Drug Alcohol Test Pull Fields-v1	Drug & Alcohol Screening	Superseded	<input type="checkbox"/>	Heidi Thonig

4. The Editing User is the person currently working on the form; this temporarily protects the form so another user cannot inadvertently open it.  
 If you logout with clicking back then that form will not be available to other users.  
 If asked, open the form and click **BACK** to return the form to Edit Mode



5. Before forms can be locked you need to add the appropriate staff to [Key Roles & Responsibilities](#) under Authorised Document Controller  
 The Administrator user will automatically be added to the role when your database is created.  
 Other users can be added as required.

Home / Registers / Administrative Registers / Key Roles & Responsibilities

Title
Authorised Document Controller
Staff
Rover Alpine
Heidi Thonig

6. Locking a Template:
  - a. The LOCK button will be greyed while the form data is loaded.
  - b. Once it has gone blue, click **LOCK** on the template info page.
  - c. Click YES to the confirmation question.  
**This may take a while, it is important to wait for the grid to come up.**
  - d. The Form is now available to use in Create Job Docs and registers.  
 See **NOTES** below regarding Documentation.



Home

**6b**



Title

Test Step in container

**Confirm** X

As owner or director you accept this form is correct and ready to be locked for use in Job Docs.

**c** **YES** NO

7. To create a new version open the form - double click or select edit to open it. Click **CREATE NEW VERSION**
8. This will open a new form and update to the next version number and make the status "Creating".
  - a. The locked form can still be used in Job Docs.
  - b. Forms in creating status can be tested in Create Job Docs/Template Testing

Home

Title  
Shared PE pre use

Report Paper Type  
A4 Portrait  Sub-Contractor Template

Industry Type  
Select IndustryType

DESIGN F **7** **CREATE NEW VERSION** PDF VIEW

When the form has been tested properly you can lock as per #6.

Home

Title  
Drug Alcohol Testing

Document ID  
AA-DA001

Version Number  
2

Template Status  
Creating

Document ID	V..	Full Title	Type	Status
AA-DA001	1	Drug Alcohol Testing-v1	Drug & Alcohol Screening	<b>a</b> Locked
AA-DA001	2	Drug Alcohol Testing-v2	Drug & Alcohol Screening	<b>b</b> Creating

9. When you **LOCK** the new version, as per step #6a, the previous version will now show as Superseded and as per #1c and can only be viewed by ticking the box.

Home / Administration / Templates / Forms

EXCEL PDF FILTER GROUP **Superseded**  Hide Versions  p22

Doc...	V...	Full Title	Template Type	Template Status
P22	1	ENVIRONMENTAL SUSTAINABILITY POLICY-v1	Work Instruction/Policies etc	Superseded
P22	2	ENVIRONMENTAL SUSTAINABILITY POLICY-v2	Work Instruction/Policies etc	Locked

10. If you are creating similar forms you can use the **COPY** function to generate a new form. Copies can be created from forms with template status Locked or Creating. The new form will default to Version 1 and not be linked to the original for Documentation purposes.

Home

LOCK SAVE **10** **COPY**

Title  
Test Step in container

Document ID  
AA-S02

Version Number  
1

Template Status  
Creating

Template Type  
SWMS

11. It is important to type in a **new Code (Document ID) & Title**, to avoid confusion with the original form.
12. Click **SAVE**.

Add New Item

Code  
IND13

Title  
Site Induction Green

**11**

**12** SAVE CANCEL

### A. Update Formsminder Version:

1. Hold down CTRL+F5 on your keyboard.
2. In the message box click **CONFIRM**.
3. Check version number.

updating to new version

update available for the app please confirm

**2** Confirm


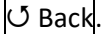
Design View Preview **3** Formsminder V9.0.6 Save Back

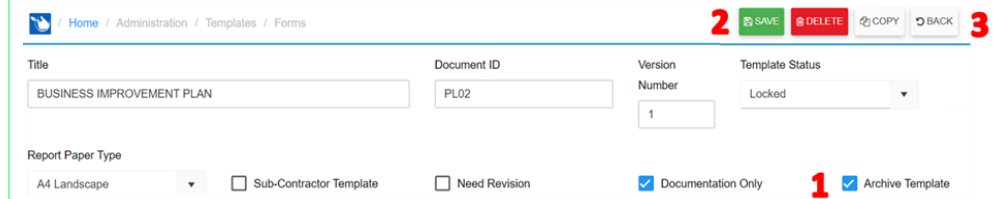
Title: Workplace Inspection Checklist Document ID: AA-1001

Trans-Tasman Software Pty Ltd T/A SafetyMinder Workplace Inspection

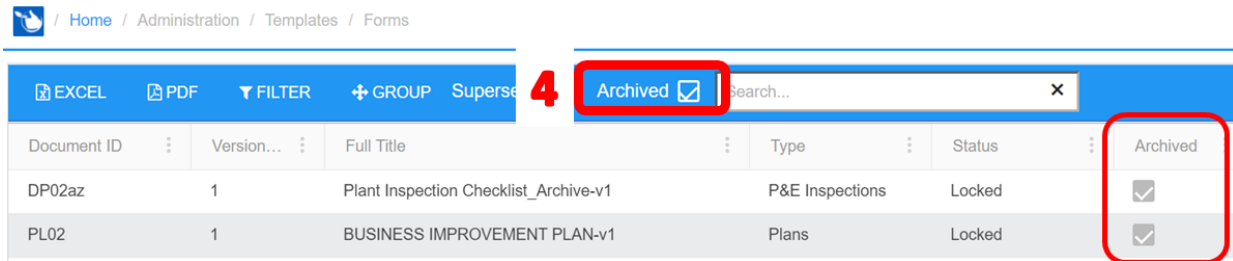
## B. Archive Forms:

When a locked form is no longer required i.e. you do not use this form anymore and a new version is not required. Open the form you need to archive:

4. Tick "Archive Template".
5. Click .
6. Click .

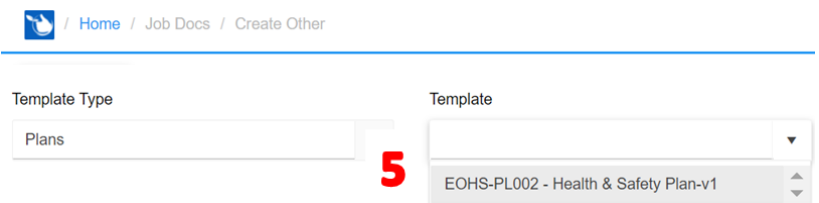


7. In the grid you can now tick the Archived box and see them.



Document ID	Version...	Full Title	Type	Status	Archived
DP02az	1	Plant Inspection Checklist_Archive-v1	P&E Inspections	Locked	<input checked="" type="checkbox"/>
PL02	1	BUSINESS IMPROVEMENT PLAN-v1	Plans	Locked	<input checked="" type="checkbox"/>

8. In Create Job Docs or registers the form will no longer appear in the selection list.



## NOTES:

**IMPORTANT:** Contact us at [support@safetyminder.co](mailto:support@safetyminder.co) if you need any help.

When certain forms are locked they will also push into the appropriate folder in Documentation:

- [Other](#) which includes Checklists, Forms, Plans & Permits.
- [Safe Work Method Statements](#)
- [Work Instructions-Policies-Procedures](#)


When new versions are pushed this will also push through to the appropriate [Document Distribution](#) menu.

**Work Instructions-Policies-Procedures** require a specific workflow see [Forms used for Documentation Only](#).

Click the links below to see what specific template types are used for:

- [Audit Report Internal](#)
- [Drug & Alcohol Screening](#)
- [Fitness & Welfare Checks](#)
- [Plant Inspection](#)
- [Post & Post Use Check List](#) in Shared Plant & Equipment
- [Warehouse/Office Inspection](#)

There are specific fields that are used in some of the above Forms that may not populate when using Template Testing.

- When a locked form needs to be updated or changed use [Create New Version](#).
- To create a different form with similar information or fields use the  button. Remember to give it a unique Document ID & Title.

Locked Forms are available in the mobile app to [Create Job Docs](#).



