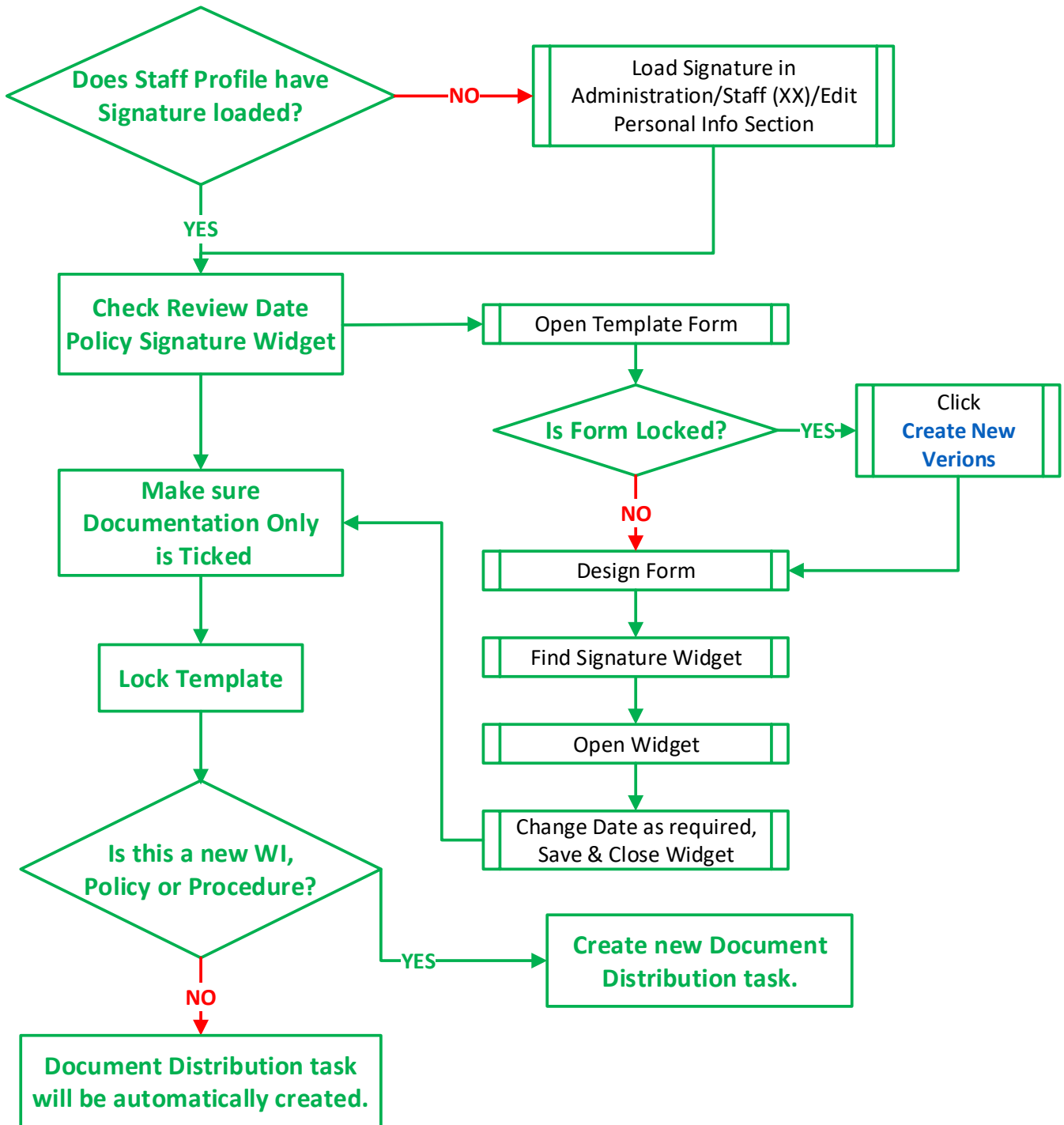




Documentation Only Forms

This is used for Template/Forms that are for review purposes only and include such things as Policies, Procedures and Work Instructions i.e. they are not forms completed in tasks or job docs. It ONLY applies to forms with template type "Work Instruction/Policies etc"

If at any stage you are unsure about what to do please contact our support team at support@safetyminder.co



Before starting the locking process:
Check the person logged on and locking the forms has a signature added in their [Personal Details](#) step #5.

- Then complete the following steps:
- Find and update the review date in the Signature Widget.
 - Make sure "Documentation Only" is ticked.
 - Lock the Form

The screenshot shows the 'PERSONAL DETAILS' form for Heidi Thonig. The 'Personal Info' section includes fields for First Name (Heidi), Last Name (Thonig), Employment Agreement (Permanent), No. Hours Per Week (40), Status (New), TimeZone (UTC+12:00 Auckland, Wellington), Date of birth (9/01/19...), and Age (53). A red box highlights the signature widget, which contains a handwritten signature and two icons (a red square and a blue square).

Contd/...

A. Updating the Review Date

Locking these forms will push them with the review date into [Documentation/Work Instructions-Policies-Procedures](#). So, before doing this you need to find the widget inside the form that has this date. We suggest you lock 10-15 forms with each date, so that you have staggered review dates for them.

1. To find the widget name open the required form in Administration/Templates/Forms and click **DESIGN FORM** see below.
2. Scroll to find the signature widget and click on it, in the top left corner it will show the Widget ID & name.
3. Click **SAVE** then OK to exit SmartForms™, then **Back** to close the form.

SmartForms

Design View Preview

Saved Widget (NECA04 - Manager Sign Policies - V1)

Title: STOP WORK PROCEDURE

Managers Name: @LockUser

Date: @LockDate

Signature: [Signature Field]

Review Date: 31/07/2021

4. Open a new tab for Administration/Templates/ Widgets.
5. Use the search box to find the Widget and open it.
6. Click **DESIGN FORM** see below.

NOTE: this widget should be the same in all these types of forms.

Home / Administration / Templates / Widgets

EXCEL PDF FILTER + GROUP Superseded Hide Versions

Neca04

Document ID	Ver...	Title	Template Type
NECA04	1	Manager Sign Policies	Work Instruction/Policies etc

7. Click on the Review Date field as shown. This will display the information in the left panel.
 8. Type in a new date in the Text field – format must be DD/MM/YYYY as shown.
- you can also click EDIT to open the text box for edit.
 9. Click **SAVE** and OK to exit SmartForms™, then **Back** to close the widget
- You can now go to the Forms page and lock the first set of documents, as per below.

SmartForms

Design View Preview

Text Block

Text: 31/07/2021 EDIT

Title: Manager Sign Policies Document ID: NECA04

Managers Name: @LockUser

Date: @LockDate

Signature: [Signature Field]

Review Date: 31/07/2021

9 Save Back

B. Documentation Only

Before locking the template make sure that “Documentation Only” is ticked.

Home

LOCK SAVE DELETE COPY BACK

Title: STOP WORK PROCEDURE

Document ID: PR04

Version Number: 2

Template Status: Creating

Template Type: Work Instruction/Policies etc

Report Paper Type: A4 Portrait

Sub-Contractor Template:

Need Revision:

Documentation Only

Archive Template:

Industry Type: Select Industry Type

State / District: SA x

Division: FOUNDATIONS x

DESIGN FORM PDF VIEW

Contd/...

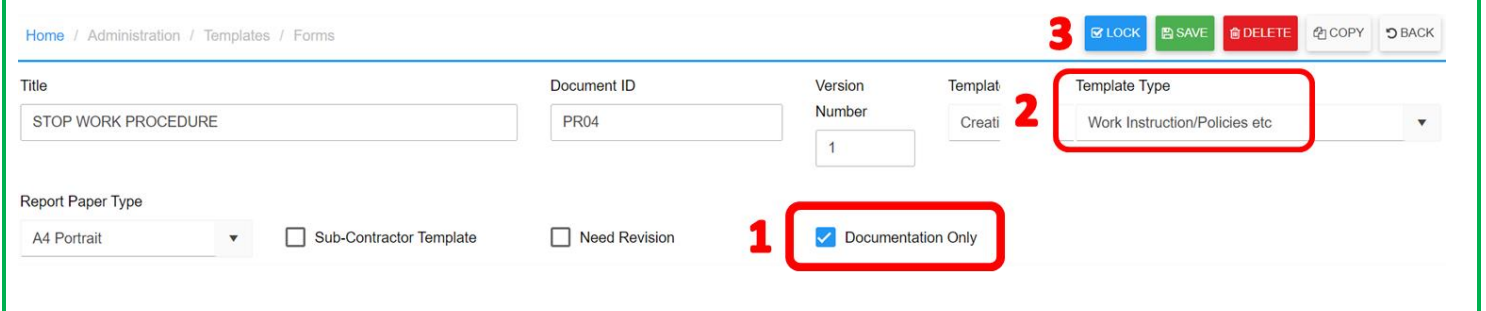
C. Locking the Form

Open the form to be locked, click **DESIGN FORM** to make any changes and check the review date. Click **SAVE** and OK to exit SmartForms™ then:

1. **CRITICAL** – make sure “Documentation Only” is ticked.
2. Check the template type is set to “Work Instructions/Polices etc”.
3. Click **LOCK & YES** to the confirmation message.

This may take a few moments, it is important to wait for the screen to return to the grid view.

A new version will now show in [Documentation/Work Instructions-Policies-Procedures](#).



Home / Administration / Templates / Forms

3 LOCK SAVE DELETE COPY BACK

Title: STOP WORK PROCEDURE Document ID: PR04 Version Number: 1 Template Type: Work Instruction/Polices etc **2**

Report Paper Type: A4 Portrait Sub-Contractor Template Need Revision **1** Documentation Only

NOTES:

- These can now be sent out for staff to read and sign off in the: [Registers/Document Distribution/Work Instruction/Work Policy Register](#)
- Once an entry has been created in Document Distribution Register, each time you create a new version Safetyminder will automatically create a new entry for all staff to sign off.
- Remember when you create a **new version** you will need to re-tick Documentation Only.

