



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

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

Before starting the locking process the following items need to be checked:

- A. The person logged on and locking the forms must have a signature added in their [Personal Details](#).
- B. Find and update the review date in the Signature Widget.

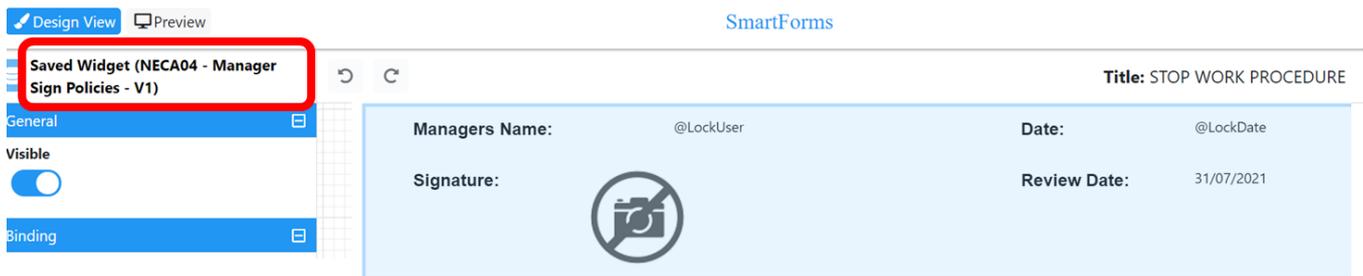
B - Updating the Review Date

- When you lock templates that have "Documentation Only" ticked there is a widget which will populate the user's name, signature, issue date and review date.
- To stop all items in this folder having the same review data we suggest you lock your forms in batches, updating the widget for every 10 to 15 documents locked. This way you will have a staggered review of policies & procedures.

To find the widget open the form to be locked, click **DESIGN FORM**.

Scroll to the where the signature widget is, in the top left corner it will show the Widget ID & name is.

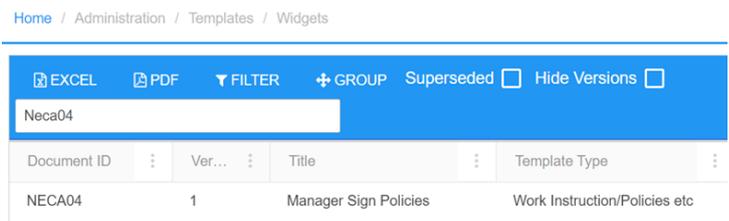
Note: most likely all of these documents will use the same widget.



Go to Administration/Templates/ Widgets.

Use the search box to find the Widget and open it.

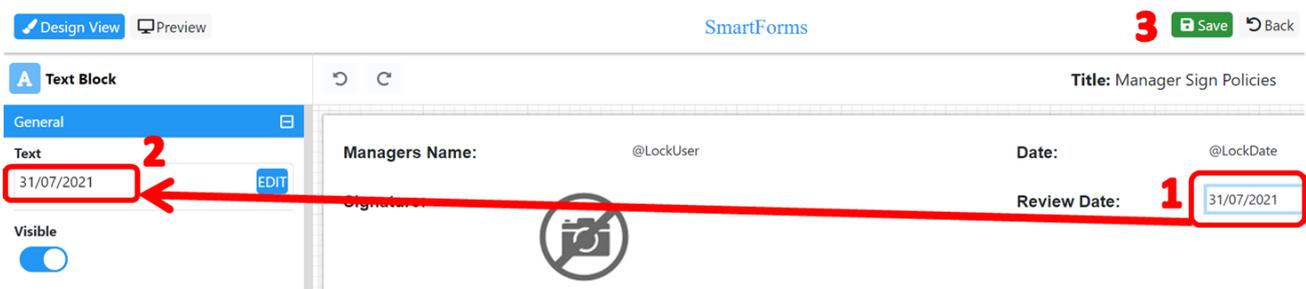
Click **DESIGN FORM**.



1. Click on the Review Date field as shown. This will display the information in the left panel.
2. 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.
3. Click **SAVE**.
4. Click **Back** on the template info page.

You can now go to the Forms page and lock the first set of documents, as per below.

When you are ready to change the Review Date follow the steps above to set a new date.



Locking the Form

Open the form to be locked

1. **CRITICAL** – make sure “Documentation Only” is ticked. When you create a new version you will need to re-tick.
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.

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

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

NOTE:

- These can now be sent out for staff to read and sign off in the: [Registers/Document Distribution/ Work Instruction / Work Policy Register](#)
- After the first entry is created in Document Distribution when new versions are created in the Documentation folder, using either of the above methods, then a new entry will automatically be created in the distribution registers.