SAFETY EVOLUTION

FORM DESIGNER

Training Guide

Admin View

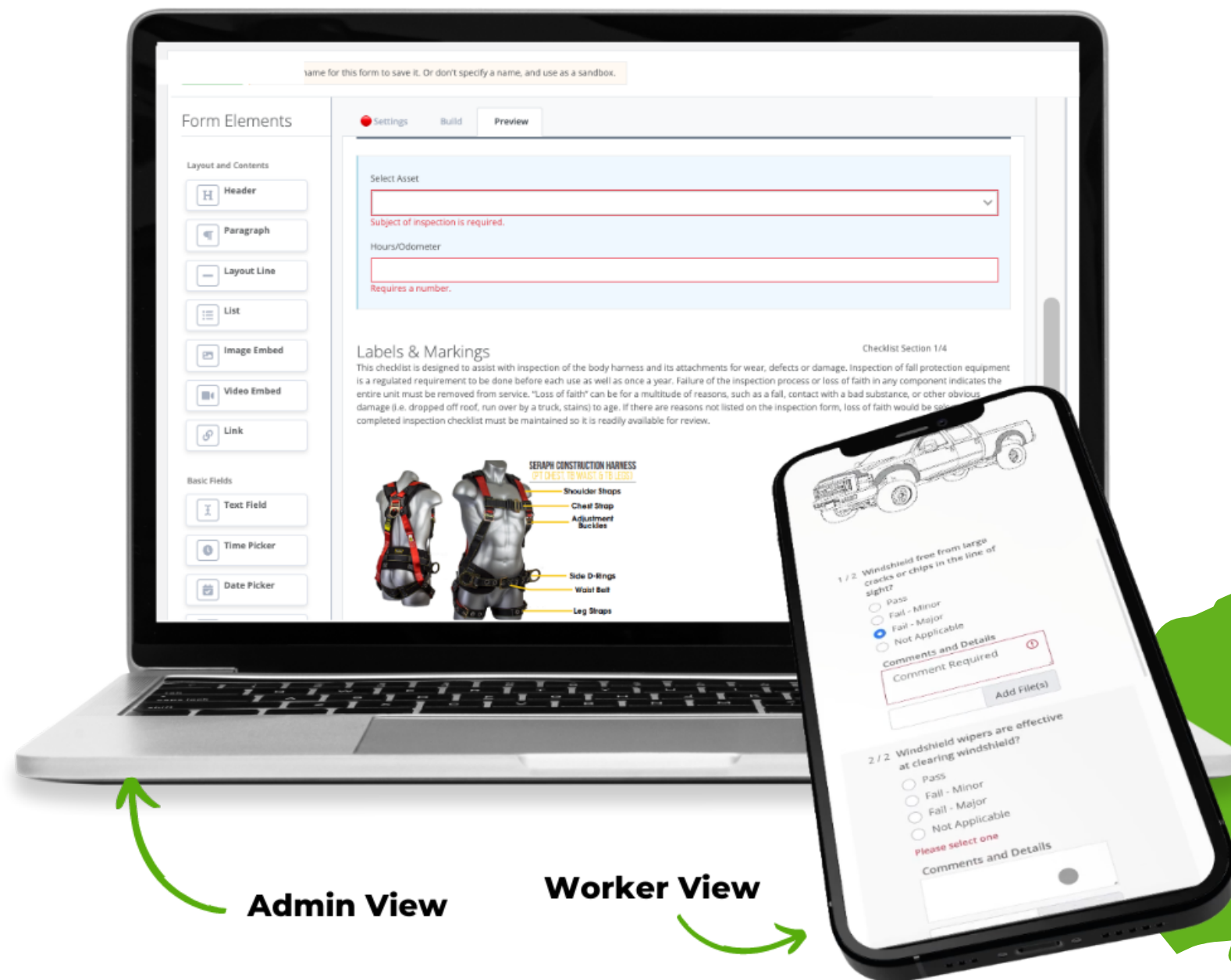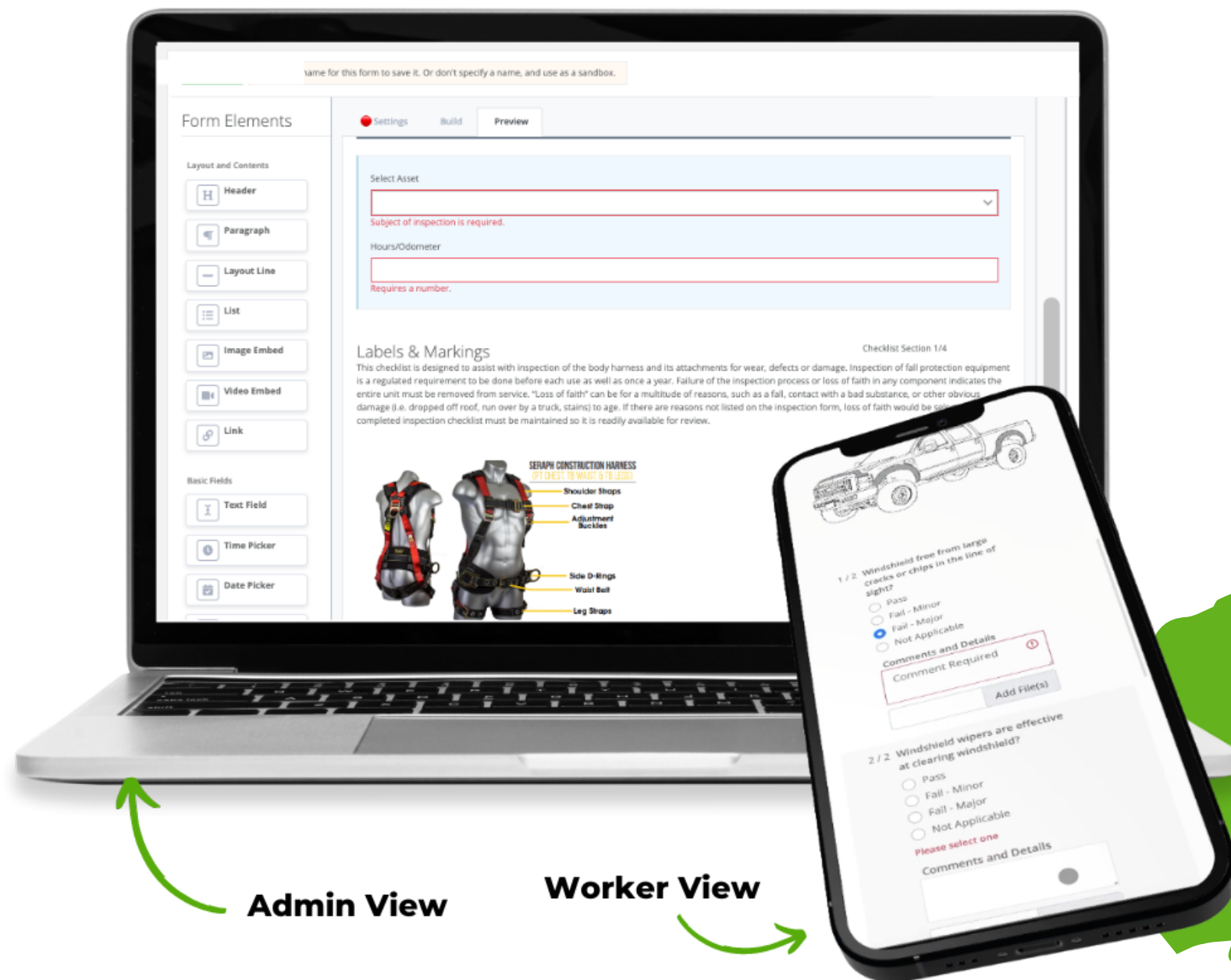Worker View

Build Digital Safety Forms That Do What You Want

Safety Evolution's Form Designer gives you the ability to digitize all of your safety paperwork with powerful modules that initiate alerts/notifications, capture worker and third-party signatures, and make tracking your assets, employees, sites and locations effortless.

Admin View

Worker View

Objectives

By the end of this training guide, you will have an understanding of:

1 Form Designer

Build your own or choose from Template Library

2 Layout & Contents

Give structure and static content to your form

3 Basic Fields

Collect information from your workers when filling out.

4 Integrated Elements

Connect the entities in your company to your forms

5 Inspection Element

Build custom equipment, site, quality check inspections

6 Action Item Element

Generate Action items off of any of your form designs. Great for Safety Meetings

7 Task Risk Assessment

Create your own Hazard Assessments with task descriptions, hazards, risk ranking and controls.

8 Safe At-Risk Element

...

9 Element Properties

Control the element settings and populate them with content

10 Preview & Publish

Test your form before pushing live for the workforce

Form Designer

Create new forms, make edits and duplicate designs

1 Form Designer

1. **CREATE A NEW FORM** OR **EXPLORE** TEMPLATE **LIBRARY**

2. **SEARCH** OR SHOW/HIDE **ARCHIVE DESIGNS**

Form Designer

Home / Settings / **Form Designs**

Form Designs

New Form Design ... ▾   **1**

Filter on Name   **2**

[   ]   ◯ Show Archived Forms   [Filter]

Status **3**	Name of Form **4**	Date **5**	Options **6**
● Draft	How to Make a Form	March 31, 2022	Actions ▾
● Unpublished Edits	Emergency Response Plan	March 30, 2022	Actions ▾
● Unpublished Edits	Perfect Safety Meeting Roadmap	March 29, 2022	Actions ▾

3. **STATUS** OF THE FORM

4. **FORM NAME** WORKER'S SEE

5. **DATE CREATED**

6. **EDIT, DUPLICATE, ARCHIVE, DELETE**

Form Designer

50+ templates for you to edit and make your own!

Form Template Library

Start from one of our fully editable templates

Self-Retracting Lifeline Inspection Form

A self-retracting lifeline inspection should be personally conducted before each use.

Use Template

Safety Harness Inspection Form

A safety harness inspection should be personally conducted before each use. When inspecting your harness look for stitching that may be broken, burned or pulled ...

Use Template

Backhoe Loader Inspection

Daily Pre-Use inspection, we recommend editing to make your own.

Use Template

Form Designer

Create new forms, make edits and duplicate designs

1. USE SETTINGS TO NAME YOUR FORM

2. USE THE BUILD TAB TO ADD ELEMENTS, UPDATE ELEMENT PROPERTIES, REARRANGE, DELETE AND GROUP

3. PREVIEW AS YOU BUILD TEST WHAT A WORKER WILL SEE

Form Designer

Home / Settings / Form Designs / **Editor**

Save Form   Provide a name for this form to save it. Or don't specify a name, and use as a sandbox.   Publish Form

Form Elements

● Settings   Build   Preview

1   **2**   **3**

Form Name

This will be how the forms is identified by your team (e.g. Confined Space Entry Plan).

Description

This is can help give an overview of the purpose of this form to help workers

Element Properties

Click Element to set Properties

This will only apply to the selected fields.

Layout and Contents

H Header

¶ Paragraph

— Layout Line

☰ List

Form Designer

Create new forms, make edits and duplicate designs

1. ADD FORM ELEMENTS …

2. …ELEMENTS WILL SLIDE INTO THE MIDDLE SECTION. THE HIGHLIGHTED ELEMENT…

3. …IS WHAT SHOWS IN ELEMENT PROPERTIES
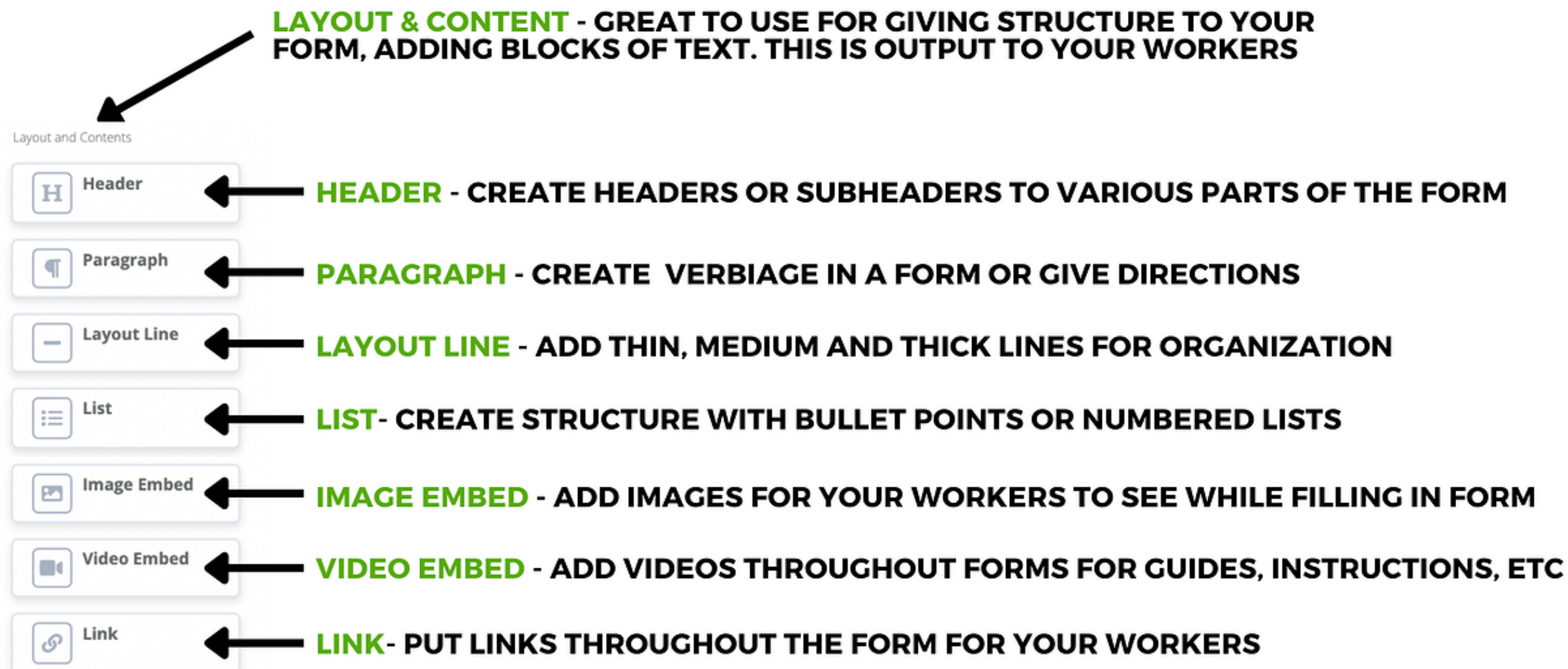
Layout & Contents Elements

Give structure and static content to your form. (This is where you speak to the worker!)

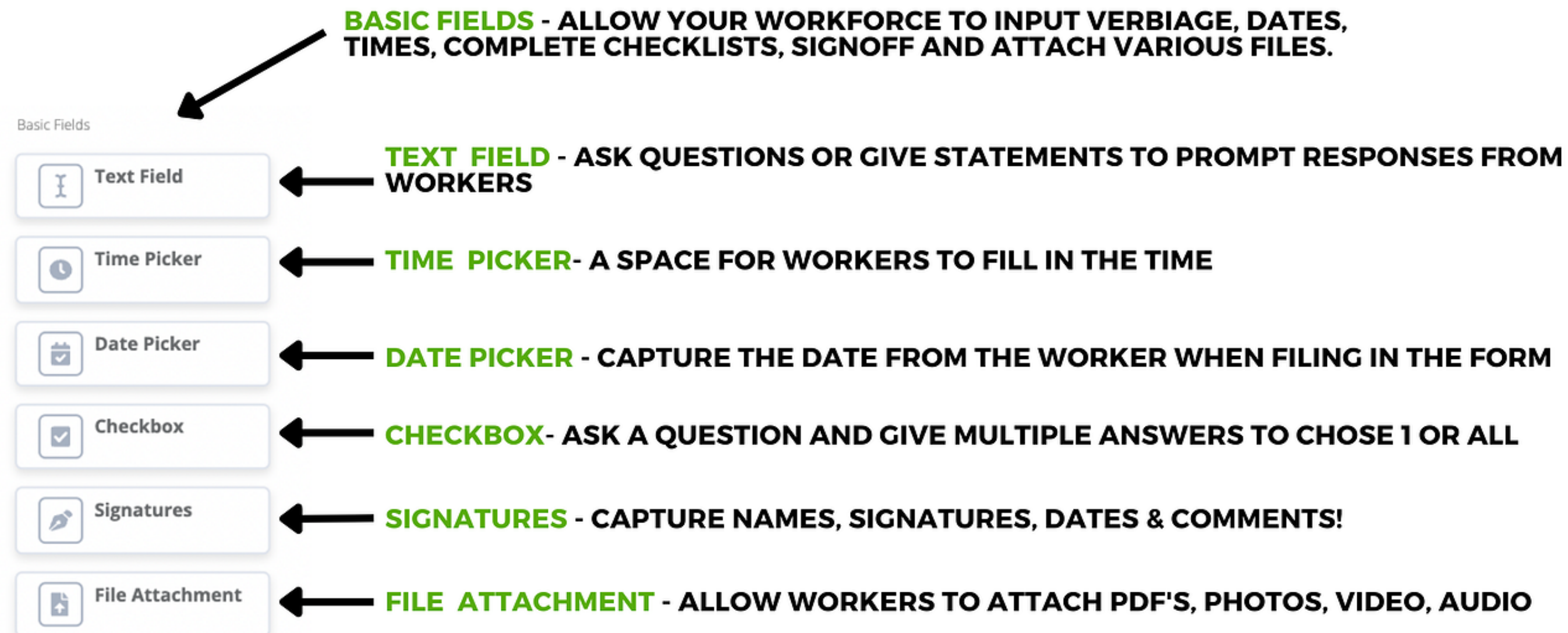**LAYOUT & CONTENT** - GREAT TO USE FOR GIVING STRUCTURE TO YOUR FORM, ADDING BLOCKS OF TEXT. THIS IS OUTPUT TO YOUR WORKERS

Layout and Contents

| Header |

HEADER - CREATE HEADERS OR SUBHEADERS TO VARIOUS PARTS OF THE FORM

| Paragraph |

PARAGRAPH - CREATE VERBIAGE IN A FORM OR GIVE DIRECTIONS

| Layout Line |

LAYOUT LINE - ADD THIN, MEDIUM AND THICK LINES FOR ORGANIZATION

| List |

LIST- CREATE STRUCTURE WITH BULLET POINTS OR NUMBERED LISTS

| Image Embed |

IMAGE EMBED - ADD IMAGES FOR YOUR WORKERS TO SEE WHILE FILLING IN FORM

| Video Embed |

VIDEO EMBED - ADD VIDEOS THROUGHOUT FORMS FOR GUIDES, INSTRUCTIONS, ETC

| Link |

LINK- PUT LINKS THROUGHOUT THE FORM FOR YOUR WORKERS

Basic Field Elements

Collect information from your workers when filling out. (Use this area to ask questions and collect responses!)

BASIC FIELDS - ALLOW YOUR WORKFORCE TO INPUT VERBIAGE, DATES, TIMES, COMPLETE CHECKLISTS, SIGNOFF AND ATTACH VARIOUS FILES.

Basic Fields

Text Field	**TEXT FIELD** - ASK QUESTIONS OR GIVE STATEMENTS TO PROMPT RESPONSES FROM WORKERS
Time Picker	**TIME PICKER**- A SPACE FOR WORKERS TO FILL IN THE TIME
Date Picker	**DATE PICKER** - CAPTURE THE DATE FROM THE WORKER WHEN FILING IN THE FORM
Checkbox	**CHECKBOX**- ASK A QUESTION AND GIVE MULTIPLE ANSWERS TO CHOSE 1 OR ALL
Signatures	**SIGNATURES** - CAPTURE NAMES, SIGNATURES, DATES & COMMENTS!
File Attachment	**FILE ATTACHMENT** - ALLOW WORKERS TO ATTACH PDF'S, PHOTOS, VIDEO, AUDIO

Integration Elements

» **Connect the entities in your company to your forms. Your Employees, Assets & Sites will populate into drop-down lists on a form**

INTEGRATION ELEMENTS - **ACTIVE LISTS OF YOUR WORKFORCE, EQUIPMENT, & SITES THAT WILL POPULATE IN A LIST FORMAT FOR YOUR WORKFORCE TO CHOOSE FROM**

Integration Elements
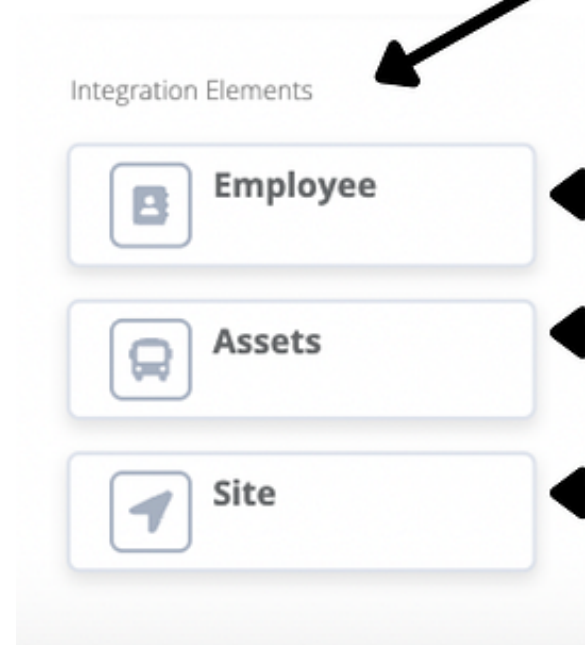
Employee → **EMPLOYEE** - **ACTIVE EMPLOYEES WILL POPULATE INTO THE LIST**

Assets → **ASSETS** - **ALL YOUR BUILT IN ASSETS WILL POPULATE INTO THE DROP-DOWN LIST**

Site → **SITE** - **ACTIVE SITES WILL BE IN THIS LIST FOR YOUR WORKERS TO SELECT**

Inspection Element

» **Allows for fully customizable responses with control over corrective action and commenting logic.**

Generate **customizable, multi-section inspections** which **initiate Corrective Actions**!

Introducing the New Inspection Building Element!

Select Inspection **Subjects**, Customized **Responses**, and Capture **inspection items** in Sections via the Element Properties

Inspection Element

>> **Setting Inspection Subject and Customizing Form Responses**

Subjects such as **Site, Asset, Employee**. This will **give your workers a list of subjects** to choose from **when completing the inspection**.

Default **responses** can be **edited** for their language

Commenting and **Corrective Action** behaviours.

Manage Inspection Responses

Inspection Responses

Add responses to the statement/ questions in your inspections. These will apply to all inspection sections added to this element. If you want a response to automatically create a corrective action you can toggle that on. Corrective Actions require comments. You may also require comments on responses that do not initiate a corrective action.

Pass

- Trigger Corrective Action Creation?
- Require Comment (required for Corrective Actions)

Fail - Minor

- Trigger Corrective Action Creation?
- Require Comment (required for Corrective Actions)

Fail - Major

- Trigger Corrective Action Creation?
- Require Comment (required for Corrective Actions)

Add Response Option

Cancel   Save Changes

Link to a Company Entity

Site

Specify the resource this inspection concerns. Assets for equipment inspections, Employees for competency type forms, and Sites for site inspections.

Manage Inspection Responses

Add custom user responses and determine if they will result in a Corrective Action or require a comment from the form user.

Current Response Options

- Pass
- Fail - Minor (Corrective Action) (Comment)
- Fail - Major (Corrective Action) (Comment)
- Not Applicable (Comment)

Edit Inspection Responses

Publish Form

Add additional **responses** or **delete** those that are not necessary.

Open the **Response Editor**

Inspection Element

Building Sections and Adding Inspection items

Give Inspections **Headers** to help stucture your forms

Add section **Description** and instructions to workers

Embed images to give reference material to workers

Drag and Drop to **re-order**

Add as many **items** as you need

Delete unwanted inspection **items**

Edit or **Delete** existing sections

Create a **new inspection section**

Inspection Element

>> **What your Workers See!**

Action Item Element

>> **Generate Action items off of any of your form designs. Create meeting forms for your managers, toolbox talks, and more!**

2 **This element will automatically generate actions items** to be assigned for correction **when a worker hands in the form**.
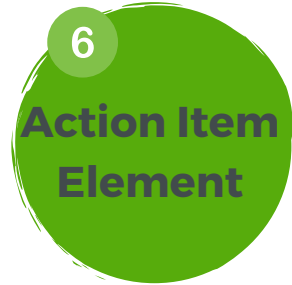

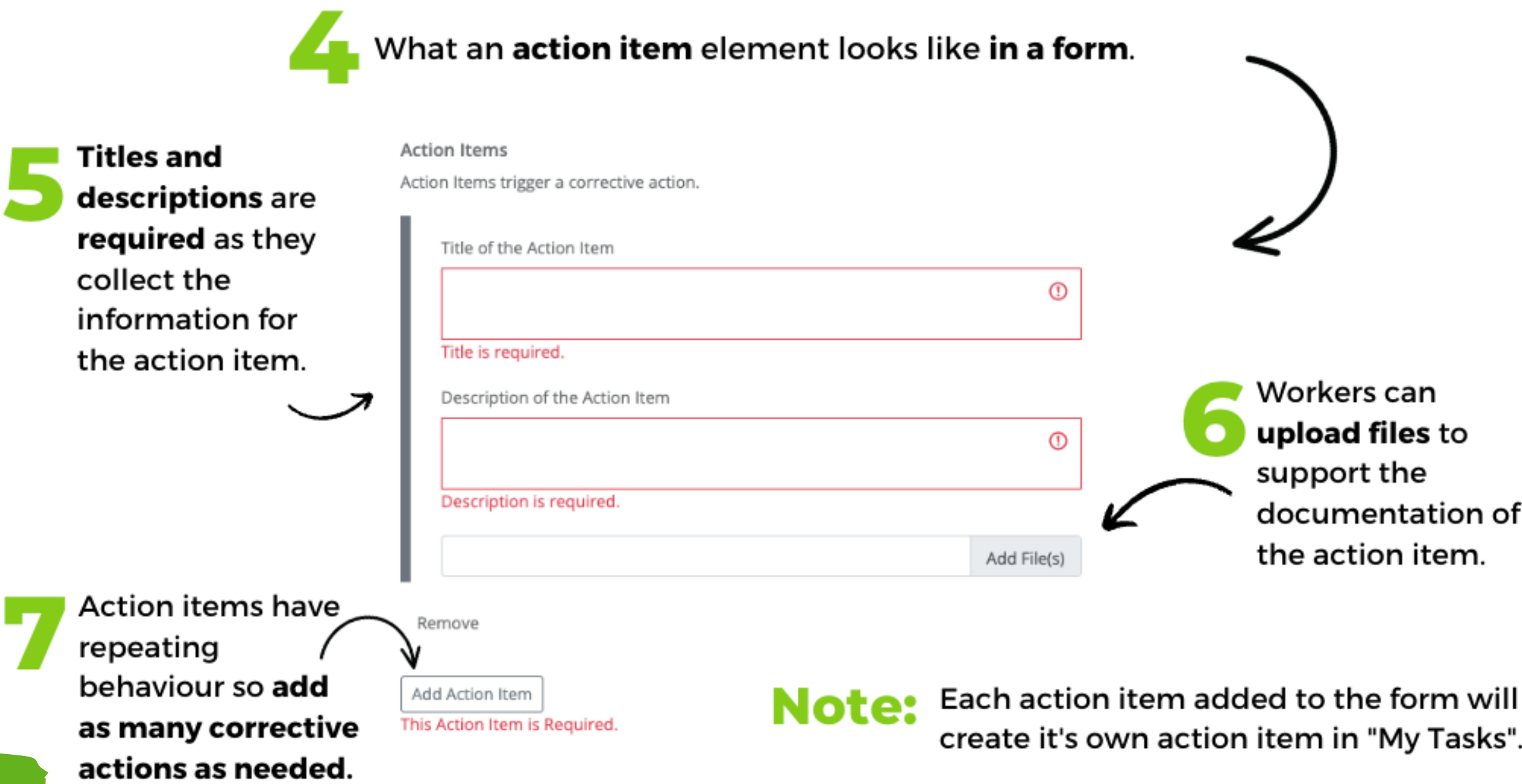
1

Click to add the element to your form design

3 Action items **can be made as a required field**, but most cases such as Safety Meetings, this can be left as optional.

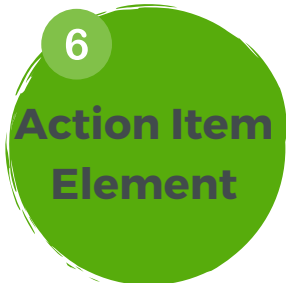# Action Item Element

>> **Generate Action items off of any of your form designs. Create meeting forms for your managers, toolbox talks, and more!**

4 What an **action item** element looks like **in a form**.

5 **Titles and descriptions** are **required** as they collect the information for the action item.

Action Items

Action Items trigger a corrective action.

Title of the Action Item

Title is required.

Description of the Action Item

Description is required.

Add File(s)

6 Workers can **upload files** to support the documentation of the action item.

7 Action items have repeating behaviour so **add as many corrective actions as needed.**

Remove

Add Action Item

This Action Item is Required.

Note: Each action item added to the form will create it's own action item in "My Tasks".

Action Item Element

>> **Generate Action items off of any of your form designs. Create meeting forms for your managers, toolbox talks, and more!**

Each Action Item added creates one action item in My Tasks

In a form

"My Tasks" View

Action Item Element

>> **Generate Action items off of any of your form designs. Create meeting forms for your managers, toolbox talks, and more!**

8 Example of an Action Item originating from your new form in the "My Tasks" View.

Action Items

Home / Action Items / **All**

Showing Recent Corrective Actions

Date Range:

2021-06-02 to 2022-12-01

Action Items

Search:

Export CSV

ID	Site	Status	Description	Assignee	Reporter	Created On	Report ID	Type	Title	Closed
CO000000000-6685	Warehouse	Pending	Icy Walkway is a hazard: Need to have a shop hand shovel and gravel the walkway asap	Unassigned	Justine Conway	2022-12-01	CF00000000-132	Safety Meeting	Safety Meeting - Required Action Item test	

Task Risk Assessment Element

Create your own Hazard Assessments with task descriptions, hazards, risk ranking and controls.

2 Click into the Task Risk Assessment tile in the builder tab to access the properties

1

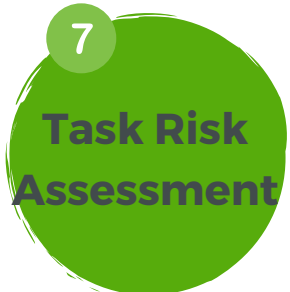**Click to add** the element to your form design

3 Task Risk Assessments **can be made as a required field** if you do not want to allow your workers to hand-in a form without it filled in.

Task Risk Assessment Element

Create your own Hazard Assessments with task descriptions, hazards, risk ranking and controls.

Task Steps

Task steps include task step description, hazard recognition, risk assessment, controls to mitig...
assessment after controls are in place.

No Task Steps Created Yet

Click "Add a Task Step" below to begin

Add Task Step

Click Here to add task step details ➤

4 Workers will see this in a new form. To add a Task Step click here.

5 The task step **description**, the **hazards**, the **calculated risk**, the required **controls**, and the **mitigated risk** after the controls are in place are added in this pop-up window by your workers.

Task Steps ✕

Task Step

Attach trailer to pickup ✓

Hazards for this step

Damage to property, injury to workers in area, busy work area with other crews close by ✓

Risk Assessment

Severity
Serious

Probability
Occasional

Controls to Mitigate the Hazards

Trained spot in line of sight all times, use radio for communication while vac trucks are running, review proper hand signals with spotter, 360 walk around ✓

Mitigated Risks

Mitigated Severity
Moderate

Mitigated Probability
Remote

Mitigations and/or management activities properly designed and operating. Routine procedures in place. No further mitigation required

Cancel   Save Task Step

Task Risk Assessment Element

Create your own Hazard Assessments with task descriptions, hazards, risk ranking and controls.

6 Once workers have entered the task step information into the pop-up it is present on the form as seen below.

Task Steps and Controls

The following task steps were documented with the hazards listed and the corresponding risks assessed. The appropriate controls for the hazards are detailed and the resulting mitigated risk is shown.

Task Step 1
Attach trailer to pickup

Hazards

Damage to property, injury to workers in area, busy work area with other crews close by

Risk Assessment:
Severity: 3 — Serious
Probability: 3 — Occasional
Evaluated Risk: 9

Controls

Trained spot in line of sight all times, use radio for communication while vac trucks are running, review proper hand signals with spotter, 360 walk around

Mitigated Risk:
Severity: 2 — Moderate
Probability: 2 — Remote
Mitigtated Risk: 4

7 Task Steps can be **deleted** by clicking the trash can button

8 Task steps can be **edited** in the pop-up window by clicking "Edit Task Step"

Edit Task Step

9 **Add** more **task steps** as required by clicking here

Add Task Step

Safe At-Risk Element

>> **Coming soon...**

Element Properties

>> **Arrange, Duplicate, Delete & Group**

Element Properties

The Element Properties panel is where you control the element settings and populate them with content.

ELEMENT PROPERTIES - POPULATE CONTENT INTO EACH ELEMENT AND CREATE SETTINGS FOR HOW THE ELEMENT FUNCTIONS

SETTINGS - KEEP ORGANIZED AND SET PARAMETERS FOR YOUR ELEMENT

ELEMENT ORGANIZATION LABEL - THIS IS WHAT SHOWS IN THE BUILD SECTION AS THE ELEMENT LABEL. WE HIGHLY RECOMMEND GIVING EACH ELEMENT A NAME TO STAY ORGANIZED FOR THE FUTURE

THESE SETTINGS WILL CHANGE DEPENDING ON THE ELEMENT

CONTENTS - USE THE CONTENTS AREA TO ADD STATEMENTS, QUESTIONS, CREATE PLACEHOLDER ANSWERS, HELPER TEXT FOR HOW TO ANSWER THE QUESTION, ETC

THESE FIELDS WILL CHANGE DEPENDING ON THE ELEMENT

Element Properties

Text Field Properties
This will only apply to the selected fields.

Settings:

Element Organization Label

Recommended - Added to your Form Design Elements. This helps you keep your templates organized and easier to edit in the future

Required Field?
Toggle on if this field will be required to complete a form for your workers.

Single Line   Multi Line

Contents:

Text Field Statement/Question:

What is the statement you would like your form users to respond to?

Placeholder Text

Optional

Gives example for what they may place in the text field.

Help Text

Optional

You can add helper text to inputs (similar to this) which gives more context for the form filler for why/how they should complete this field.

Preview & Publish

Preview to test what a worker see's and test filling out the form. Publish your design to push to your workforce

Training Checklist

Build Digital Safety Forms That Do What You Want

☐ Create New Form

☐ Explore Template Library

☐ Layout & Content Elements

☐ Basic Fields Elements

☐ Integration Elements

☐ Inspection Element

☐ Action Item Element

☐ Task Risk Assessment Element

☐ Safe At-Risk Element

☐ Arrange, Duplicate, Delete & Group

☐ Preview

☐ Publish

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Visit our Help Center for more articles on how to get started at:

https://www.safetyevolution.com/knowledge

Other questions?

support@safetyevolution.com