

Admin View

Worker View

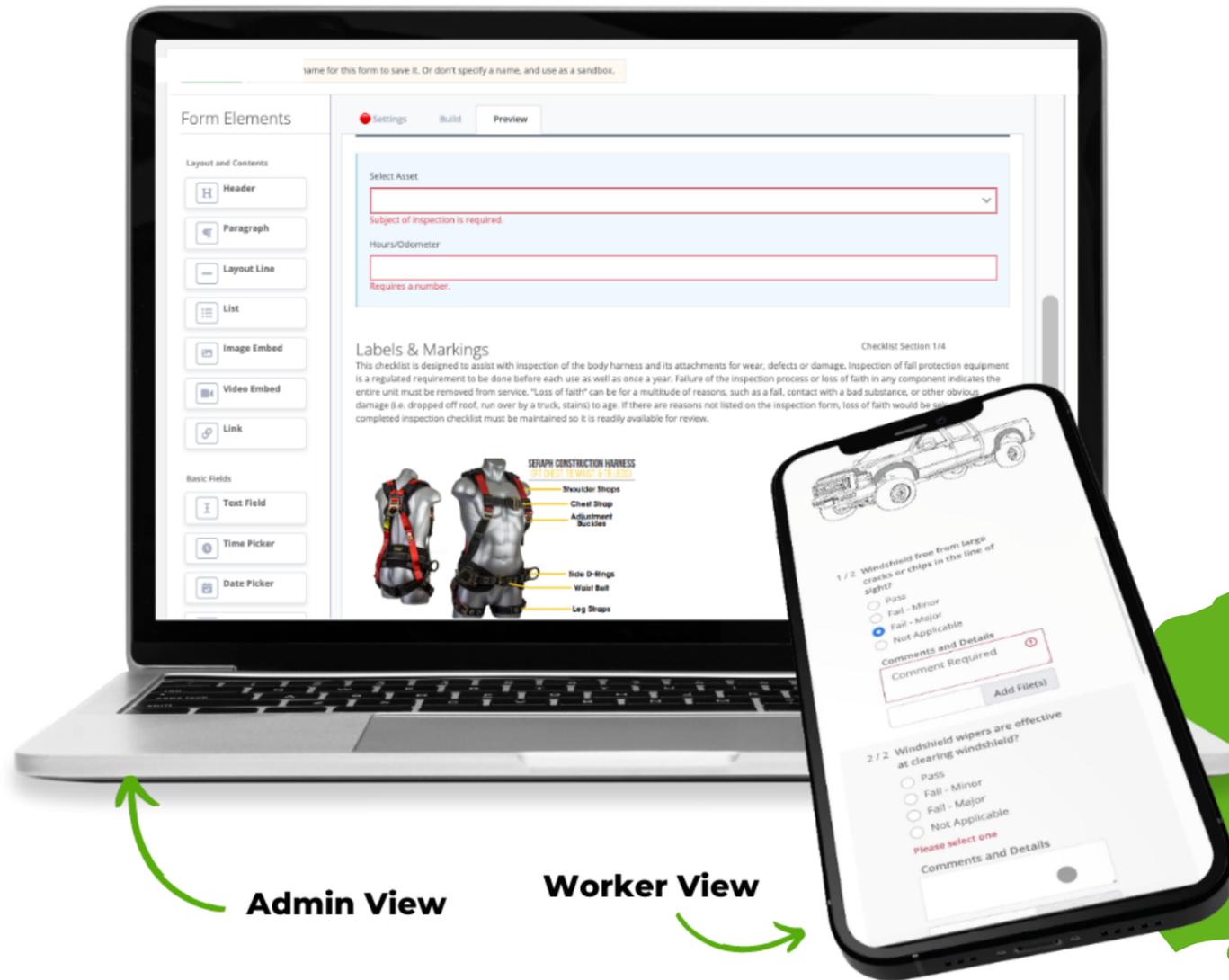
FORM DESIGNER

Training Guide



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

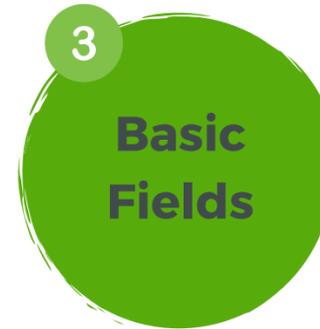
» By the end of this training guide, you will have an understanding of:



Build your own or choose from Template Library



Give structure and static content to your form



Collect information from your workers when filling out.



Connect the entities in your company to your forms



Build custom equipment, site, quality check inspections



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



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



...



Control the element settings and populate them with content



Test your form before pushing live for the workforce

Form Designer



» Create new forms, make edits and duplicate designs

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
 Show Archived Forms Filter

Status	Name of Form	Date	Options
<input checked="" type="radio"/> Draft	How to Make a Form	March 31, 2022	Actions ▾
<input type="radio"/> Unpublished Edits	Emergency Response Plan	March 30, 2022	Actions ▾
<input type="radio"/> Unpublished Edits	Perfect Safety Meeting Roadmap	March 29, 2022	Actions ▾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 ...

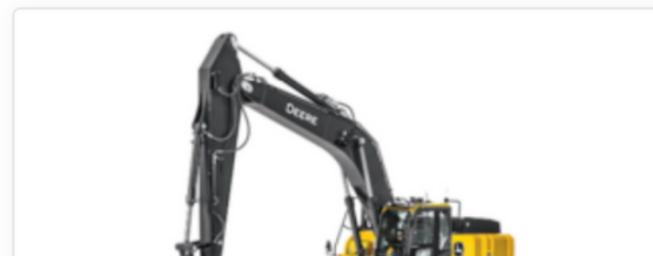
[Use Template](#)



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

The screenshot shows the Form Designer interface. At the top, there is a breadcrumb trail: Home / Settings / Form Designs / Editor. Below this is a 'Save Form' button and a text prompt: 'Provide a name for this form to save it. Or don't specify a name, and use as a sandbox.' To the right is a 'Publish Form' button. The main area is divided into three sections: 'Form Elements', 'Form Properties', and 'Element Properties'. The 'Form Elements' section on the left lists 'Layout and Contents' with options: Header, Paragraph, Layout Line, and List. The 'Form Properties' section in the center has three tabs: 'Settings' (selected), 'Build', and 'Preview'. Below the tabs are fields for 'Form Name' (with a text input), 'Description' (with a text input), and a note: 'This is can help give an overview of the purpose of this form to help workers'. The 'Element Properties' section on the right has a note: 'Click Element to set Properties. This will only apply to the selected fields.' Three numbered arrows point to the 'Settings', 'Build', and 'Preview' tabs respectively.



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

The screenshot shows the Form Designer interface with three numbered callouts:

- 1. Form Elements:** A sidebar on the left containing various form elements like Header, Paragraph, List, Text Field, etc.
- 2. Middle Section:** A central workspace with tabs for Settings, Build, and Preview. A 'Survey' element (checkbox) is highlighted in blue.
- 3. Element Properties:** A panel on the right showing configuration options for the selected Survey element, such as 'Settings', 'Element Organization Label', and 'Contents'.



Layout & Contents Elements

2

Layout & Content

» 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

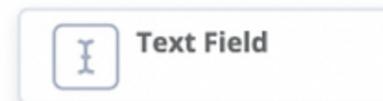
3

Basic Fields

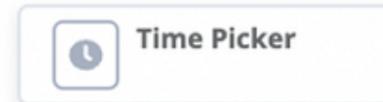
» Collect information from your workers when filling out. (Use this area to ask questions and collect responses!)

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

Basic Fields



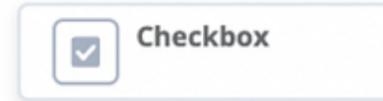
← **TEXT FIELD** - ASK QUESTIONS OR GIVE STATEMENTS TO PROMPT RESPONSES FROM WORKERS



← **TIME PICKER**- A SPACE FOR WORKERS TO FILL IN THE TIME



← **DATE PICKER** - CAPTURE THE DATE FROM THE WORKER WHEN FILING IN THE FORM



← **CHECKBOX**- ASK A QUESTION AND GIVE MULTIPLE ANSWERS TO CHOSE 1 OR ALL



← **SIGNATURES** - CAPTURE NAMES, SIGNATURES, DATES & COMMENTS!



← **FILE ATTACHMENT** - ALLOW WORKERS TO ATTACH PDF'S, PHOTOS, VIDEO, AUDIO



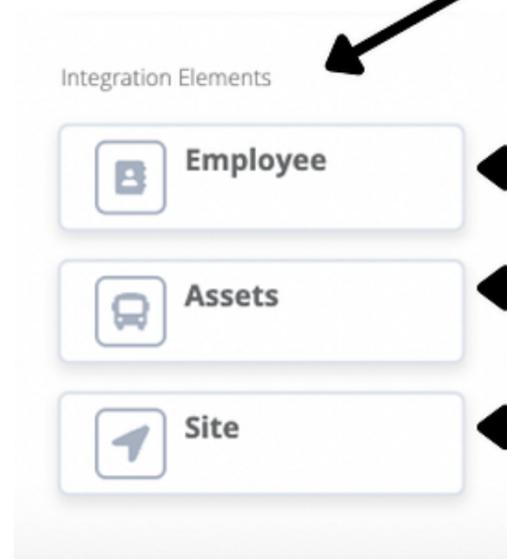
Integration Elements

4

Integrated 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



← **EMPLOYEE - ACTIVE EMPLOYEES WILL POPULATE INTO THE LIST**

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

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



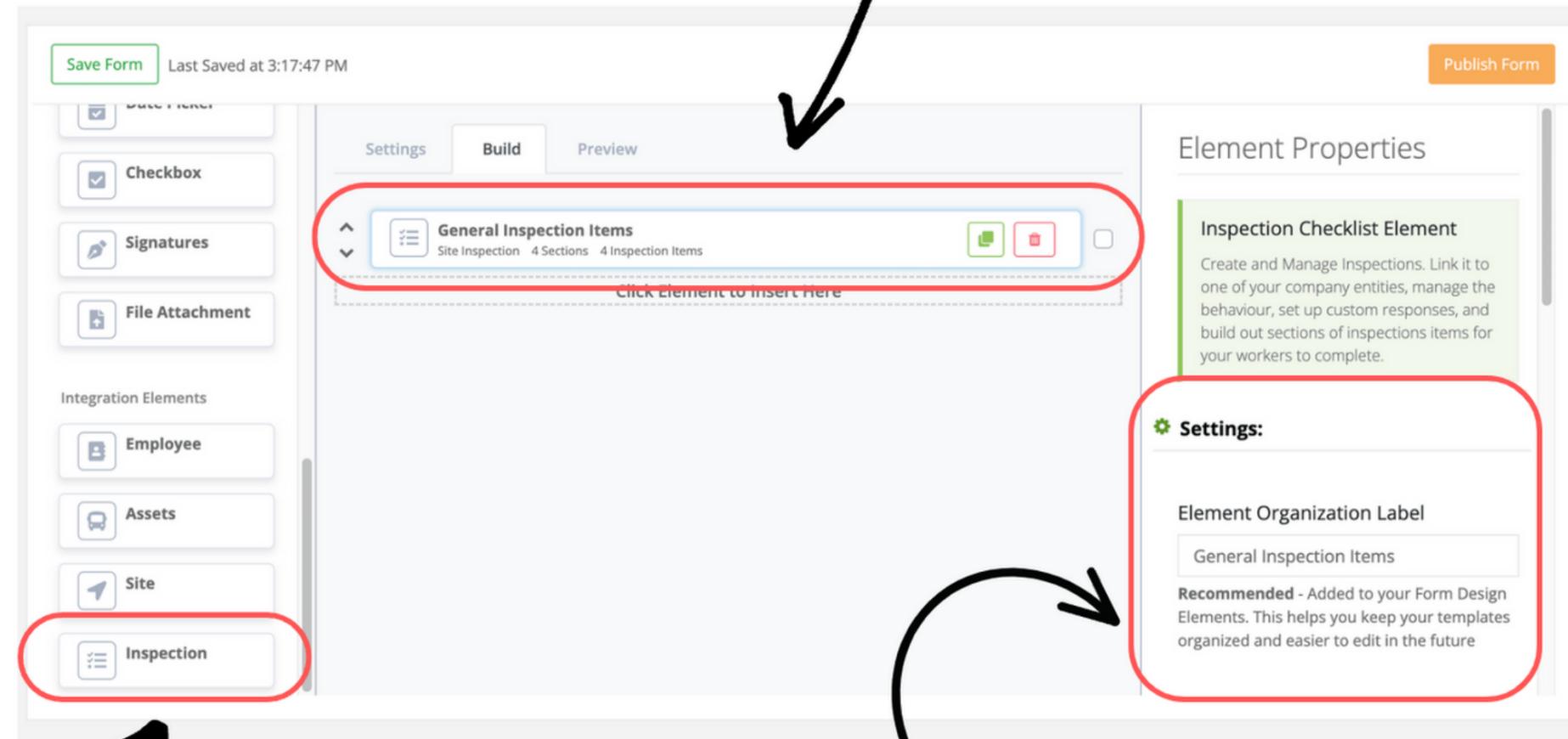
Inspection Element

2

Sites & Supervisors

» 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.

The image shows two parts of a software interface. On the left is a 'Manage Inspection Responses' dialog box with a title bar and a close button. It contains a list of response options: 'Pass', 'Fail - Minor', and 'Fail - Major'. Each option has a trash icon on the right and two toggle switches below it: 'Trigger Corrective Action Creation?' and 'Require Comment (required for Corrective Actions)'. The 'Pass' option has both toggles off. 'Fail - Minor' and 'Fail - Major' have both toggles on. At the bottom of the dialog is an 'Add Response Option' button, a 'Cancel' button, and a 'Save Changes' button. On the right is a 'Link to a Company Entity' section of a form editor. It features a dropdown menu with 'Site' selected, a 'Publish Form' button, and an 'Edit Inspection Responses' button at the bottom. A 'SAFETY' logo is visible in the top right corner of the form editor.

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 structure 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

The image shows a software interface for creating and managing inspection sections and items. It consists of two main parts: an 'Inspection Section Modal' and an 'Inspection Items' list.

Inspection Section Modal: This modal is used to create a new section. It contains three main input fields, each highlighted with a red circle and an arrow pointing to an explanatory text block:

- Section Header (Recommended):** A text input field containing 'Exterior Vehicle 360 Walk Around'. An arrow points to the text 'Give Inspections Headers to help structure your forms'.
- Section Description (Recommended):** A text input field containing 'Inspect each item in the following inspection by completing a 360-degree walk around the exterior of the truck. Fail - Minor'. An arrow points to the text 'Add section Description and instructions to workers'.
- Select your Image/s to upload: (Optional):** A file upload area with an 'Add File(s)' button and a small image of a truck. An arrow points to the text 'Embed images to give reference material to workers'.

Below the modal, there is a 'Contents:' panel showing a list of 'Current Sections' with edit and delete icons for each. An arrow points to this panel with the text 'Edit or Delete existing sections'.

At the bottom of the modal, there is a blue button labeled 'Add Inspection Section'. An arrow points to this button with the text 'Create a new inspection section'.

Inspection Items: This panel shows a list of items. One item is highlighted with a red circle and an arrow pointing to the text 'Drag and Drop to re-order':

- Item:** 'Windshield is free from significant cracks or chips which impair line of site or structural'. It has a drag handle icon on the left and a delete icon on the right.

Below the list is an 'Add Inspection Item' button, highlighted with a red circle and an arrow pointing to the text 'Add as many items as you need'.

At the bottom right of the items panel, there is a delete icon (trash can) highlighted with a red circle and an arrow pointing to the text 'Delete unwanted inspection items'.



Inspection Element

»» What your Workers See!

Inspection Items in a form

1 / 3 House keeping is in good order

Pass
 Fail - Minor
 Fail - Major
 Not Applicable

Comments and Details

Comment Required

Add File(s)

2 / 3 Soils clothes bin has been emptied in last 24 hours

Pass
 Fail - Minor
 Fail - Major
 Not Applicable

Comments and Details

Was emptied but was full already - needs to be emptied again

Add File(s)



Screen Sh...

Items which
trigger **Corrective
Actions** show
previews of the
Identified
Deficiencies

Identified Deficiencies

[Hide Deficiencies](#)

If you have identified areas requiring action, the summary of each deficiency will be found below. You may combine all deficiencies into one corrective action or keep them separate.

Create Separate Action Items
Count: 1

Deficiency: 1	Deficiency: 2
<p>Title of Corrective Action: Soils clothes bin has been emptied in last 24 hours</p> <p>Inspection Question Details: Inspection Question: 2/3 Response: Fail - Minor</p> <p>Description of Corrective Action: Was emptied but was full already - needs to be emptied again</p> <p>Attachments:</p> 	<p>Title of Corrective Action: Workers are all wearing ppe while in work areas</p> <p>Inspection Question Details: Inspection Question: 3/3 Response: Fail - Major</p> <p>Description of Corrective Action: REQUIRES COMMENT TO COMPLETE</p> <p>Attachments:</p>

Checklist is incomplete.



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

The screenshot shows the 'Form Designer' interface with a sidebar on the left containing various form elements. The 'Action Item' element is highlighted with a red box. A large black arrow points from the 'Action Item' element in the sidebar to the 'Element Properties' panel on the right. The 'Element Properties' panel shows the 'Action Item Element' settings, including a description and a 'Settings' section with an 'Element Organization Label' set to 'Safety Meeting Action Items'. The main form design area shows a 'Safety Meeting Action Items' element being added to the form, with a red box around it and a 'Click Element to Insert Here' prompt below it.

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

Action Items

Action Items trigger a corrective action.

Title of the Action Item

 ⓘ
Title is required.

Description of the Action Item

 ⓘ
Description is required.

In a form



ID	Site	Status	Description
CO000000000-6685	Warehouse	Pending	Icy Walkway is a hazard: Need to have a shop hand shovel and gravel the walkway asap

"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
CO00000000-6685	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	



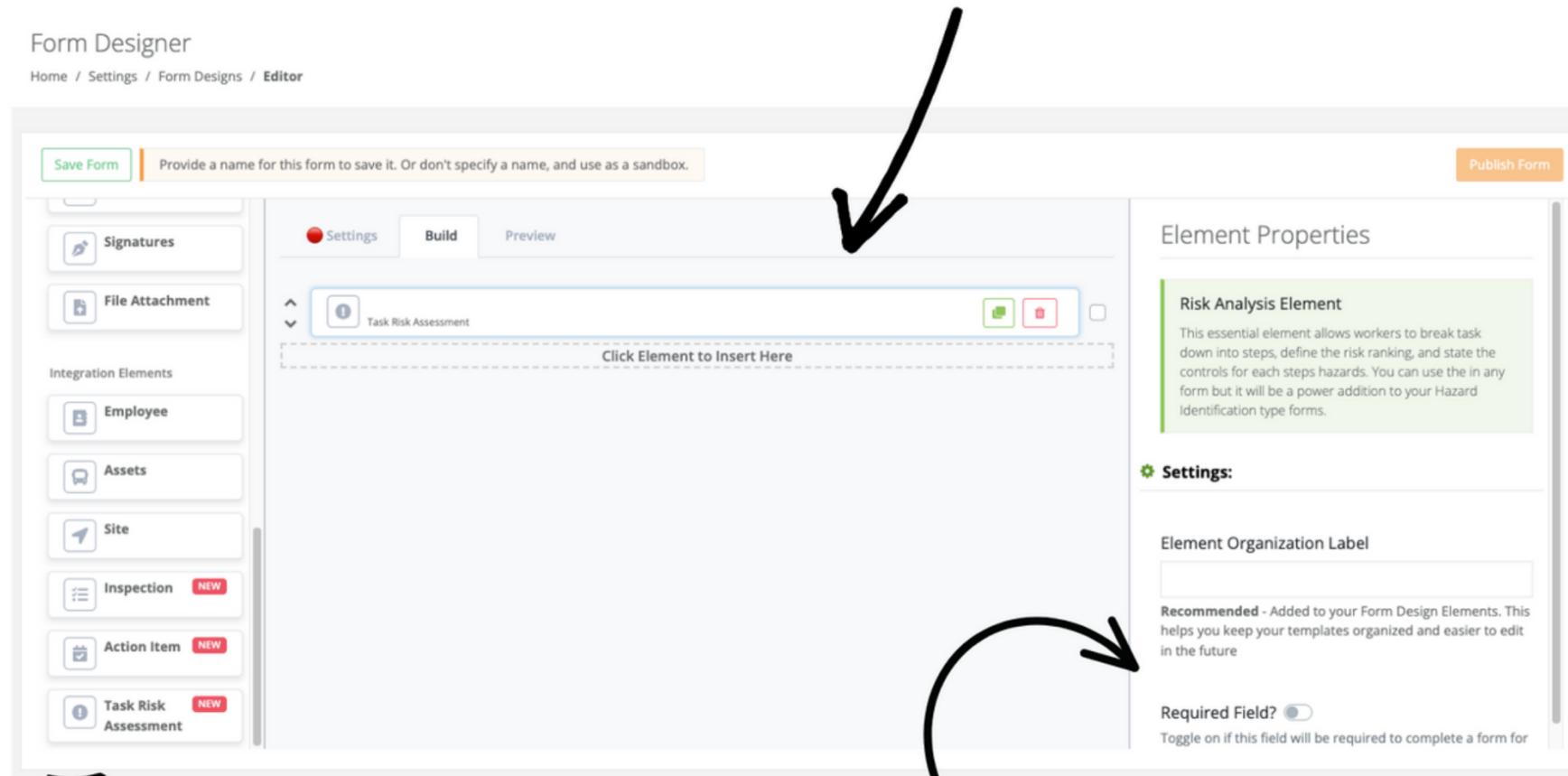
Task Risk Assessment Element



» 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.

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 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

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

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

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

1. CHECK OFF WHAT ELEMENTS YOU WANT TO GROUP...

2. CREATE A GROUP OF THE SECTECTED ELEMENTS...

The screenshot shows the 'Form Designer' interface. On the left is the 'Form Elements' list with categories like 'Layout and Contents' and 'Basic Fields'. The 'Build' tab is active. On the right is the 'Group Properties' panel. A red box highlights the 'Create Repeating' section, which includes a toggle switch and an 'Ungroup' button. A red box also highlights the 'Create Group' button in the 'Group Properties' panel. A red box highlights the checkboxes in the 'Form Elements' list. A red box highlights the 'Create Repeating' section in the 'Group Properties' panel.

3. CREATE REPEATING GROUPS OR UNGROUP



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

The screenshot shows the 'Element Properties' panel with several sections highlighted in red boxes. An arrow points from the top-left text to the 'Element Properties' title. Another arrow points from the 'SETTINGS' text to the 'Settings:' section. A third arrow points from the 'ELEMENT ORGANIZATION LABEL' text to the 'Element Organization Label' text input field. A fourth arrow points from the '*THESE SETTINGS WILL CHANGE DEPENDING ON THE ELEMENT*' text to the 'Required Field?' toggle and 'Single Line / Multi Line' options. A fifth arrow points from the 'CONTENTS' text to the 'Contents:' section. A sixth arrow points from the '*THESE FIELDS WILL CHANGE DEPENDING ON THE ELEMENT*' text to the 'Text Field Statement/Question:', 'Placeholder Text', and 'Help Text' input fields.



Preview & Publish

10

Preview & Publish

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

1. CONTINUE TO **PREVIEW** YOUR FORM TO SEE HOW IT RESPONDS AND LOOKS...

2. **PUBLISH** YOUR FORM WHEN READY! IT WILL GO LIVE TO YOUR WORKERS

The screenshot shows the 'Form Designer' interface. At the top left, there is a 'Save Form' button and a timestamp 'Last Saved at 8:48:24 AM'. Below this is a breadcrumb trail: 'Home / Settings / Form Designs / Editor'. The main workspace is divided into three panels. On the left is the 'Form Elements' panel with categories 'Layout and Contents' (Header, Paragraph, Layout Line, List, Image Embed, Video Embed, Link) and 'Basic Fields' (Text Field, Time Picker, Date Picker, Checkbox). The middle panel is the 'Build' tab, which is highlighted with a red box and a large number '1'. It shows a 'Work Permit' form with instructions and a workflow list: '1. Settings', '2. Build', '3. Preview'. A smaller preview window is visible within this panel. On the right is the 'Element Properties' panel, which is also highlighted with a red box and a large number '2'. It contains sections for 'Checkbox Properties', 'Settings' (with 'Element Organization Label' set to 'Survey', 'Allow Multiple' toggle, and 'Required Field?' toggle), and 'Contents' (with 'Checkbox Statement/Question' set to 'Where these instructions'). A 'Publish Form' button is located in the top right corner of the interface.



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



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

<https://www.safetyevolution.com/knowledge>

Other questions?

support@safetyevolution.com