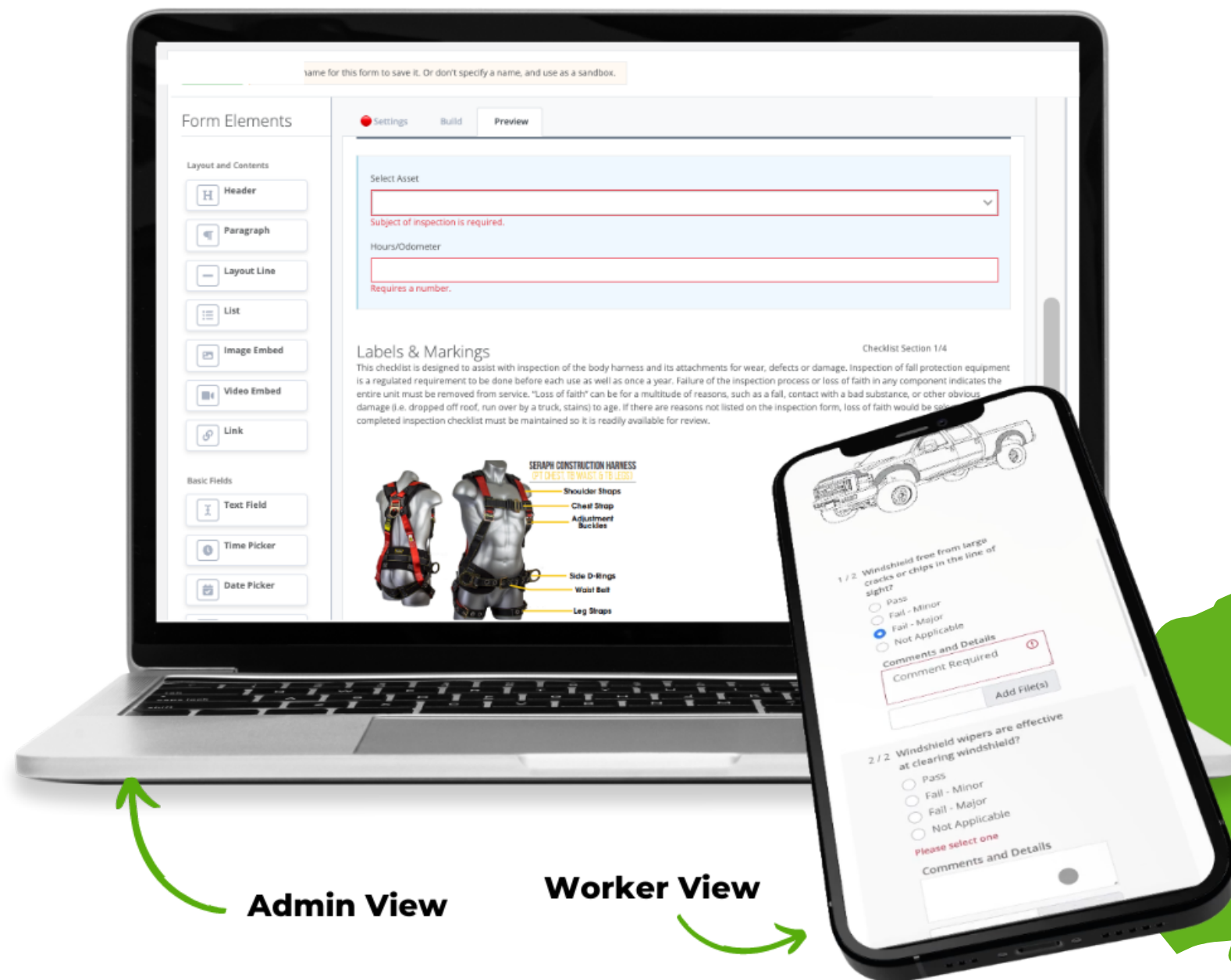




# FORM DESIGNER

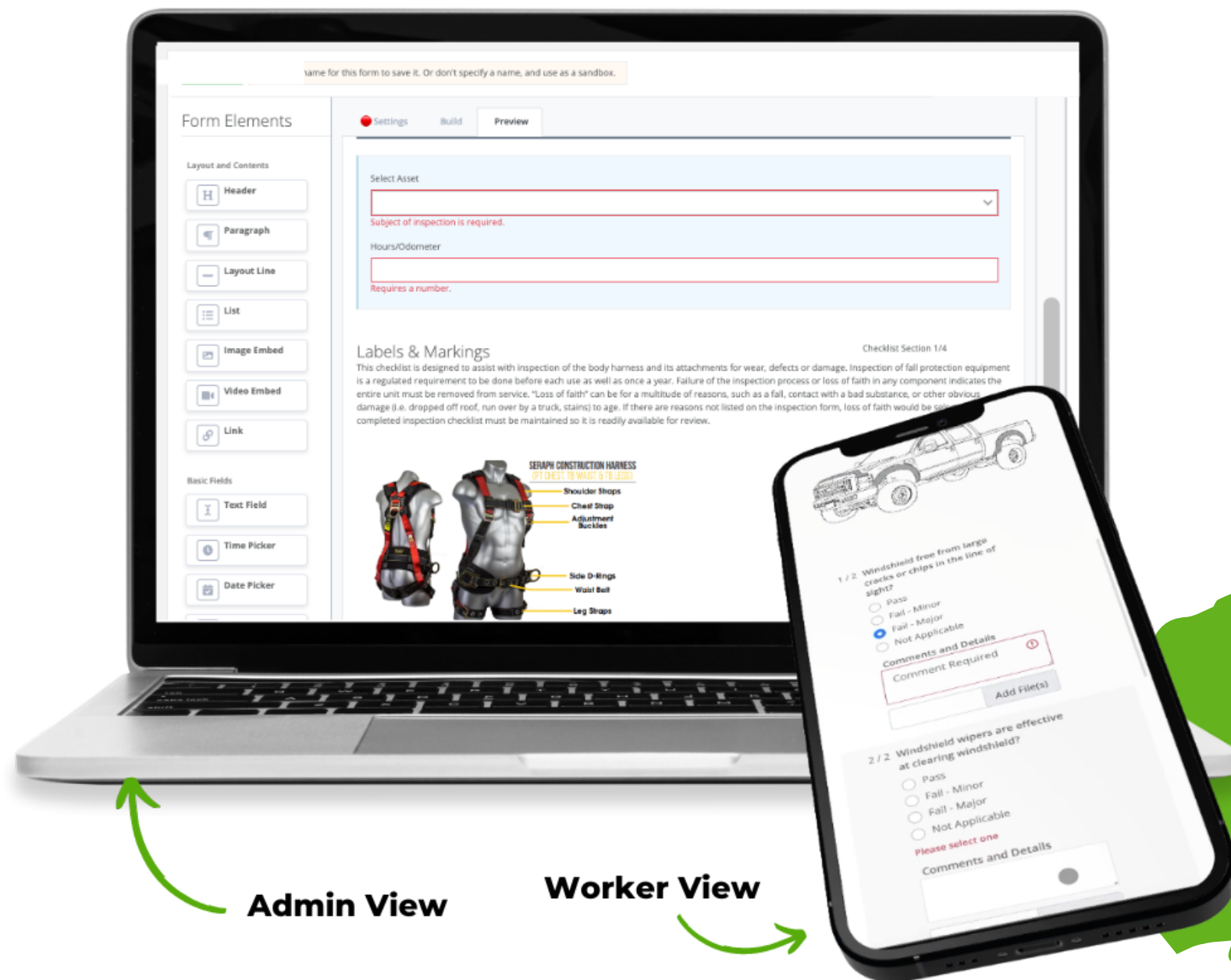
## Training Guide





## 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:

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. **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 2

Status 3	Name of Form 4	Date 5	Options 6
<input checked="" type="radio"/> Draft	How to Make a Form	March 31, 2022	<input type="button" value="Actions"/>
<input type="radio"/> Unpublished Edits	Emergency Response Plan	March 30, 2022	<input type="button" value="Actions"/>
<input type="radio"/> Unpublished Edits	Perfect Safety Meeting Roadmap	March 29, 2022	<input type="button" value="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!

1

Form  
Designer

## 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

Form  
Designer

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

Layout and Contents

- Header
- Paragraph
- Layout Line
- List

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.



# Form Designer

» Create new forms, make edits and duplicate designs

1

Form  
Designer

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. ADD FORM ELEMENTS ...**: Points to the "Form Elements" sidebar on the left. It contains two sections: "Layout and Contents" with elements like Header, Paragraph, Layout Line, List, Image Embed, Video Embed, and Link; and "Basic Fields" with elements like Text Field, Time Picker, Date Picker, Checkbox, and Signatures.
- 2. ...ELEMENTS WILL SLIDE INTO THE MIDDLE SECTION. THE HIGHLIGHTED ELEMENT...**: Points to the central "Build" area. A "Survey" element (checkbox) is highlighted with a blue border. Above it are other elements like "Starting Place", "Instructions", "Repeatable", "Line Light", "Instructions to Follow", "Workflow Image", "Line Medium", "Build Tab", and "Name & Signature".
- 3. ...IS WHAT SHOWS IN ELEMENT PROPERTIES**: Points to the "Element Properties" sidebar on the right. It shows "Checkbox Properties" with a description, "Settings" (including "Element Organization Label" set to "Survey", "Allow Multiple" toggle, and "Required Field?" toggle), and "Contents" (including "Checkbox Statement/Question" and "Options").



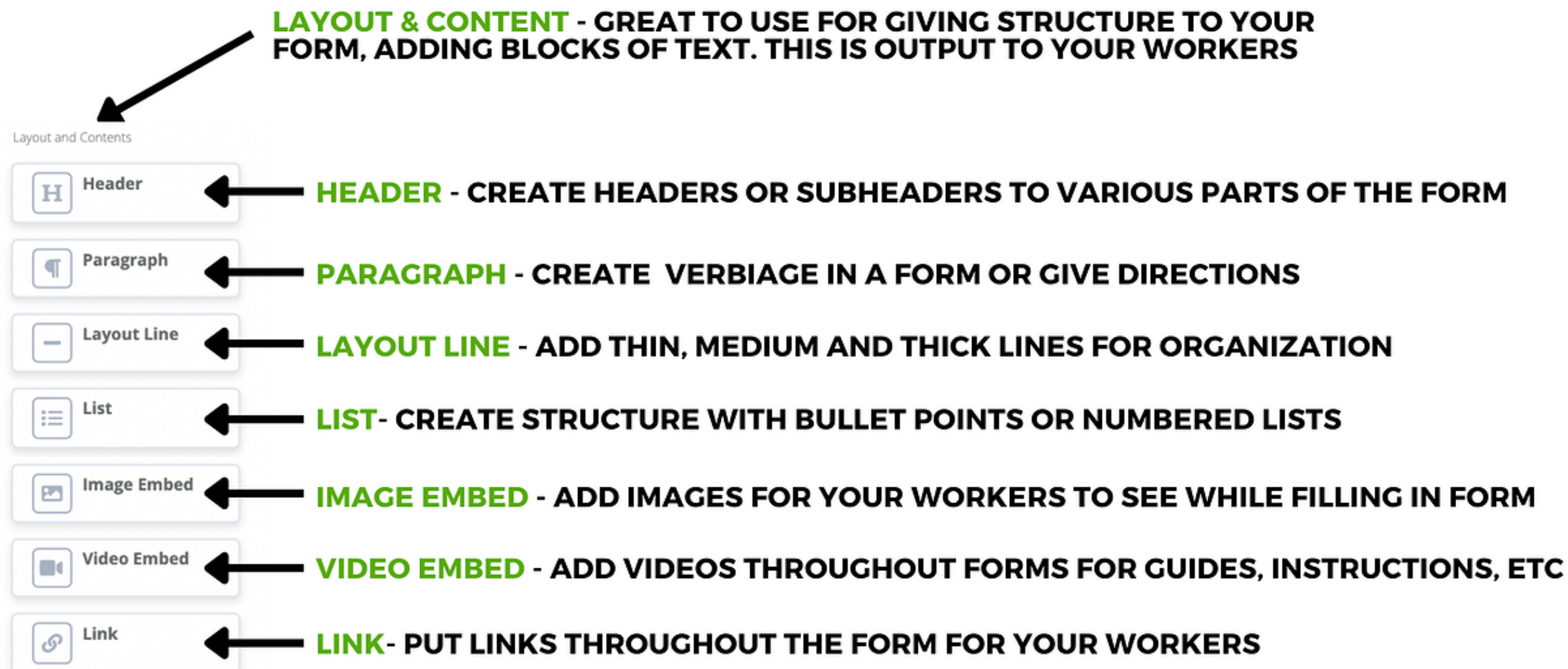


# Layout & Contents Elements

2

Layout &  
Content

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

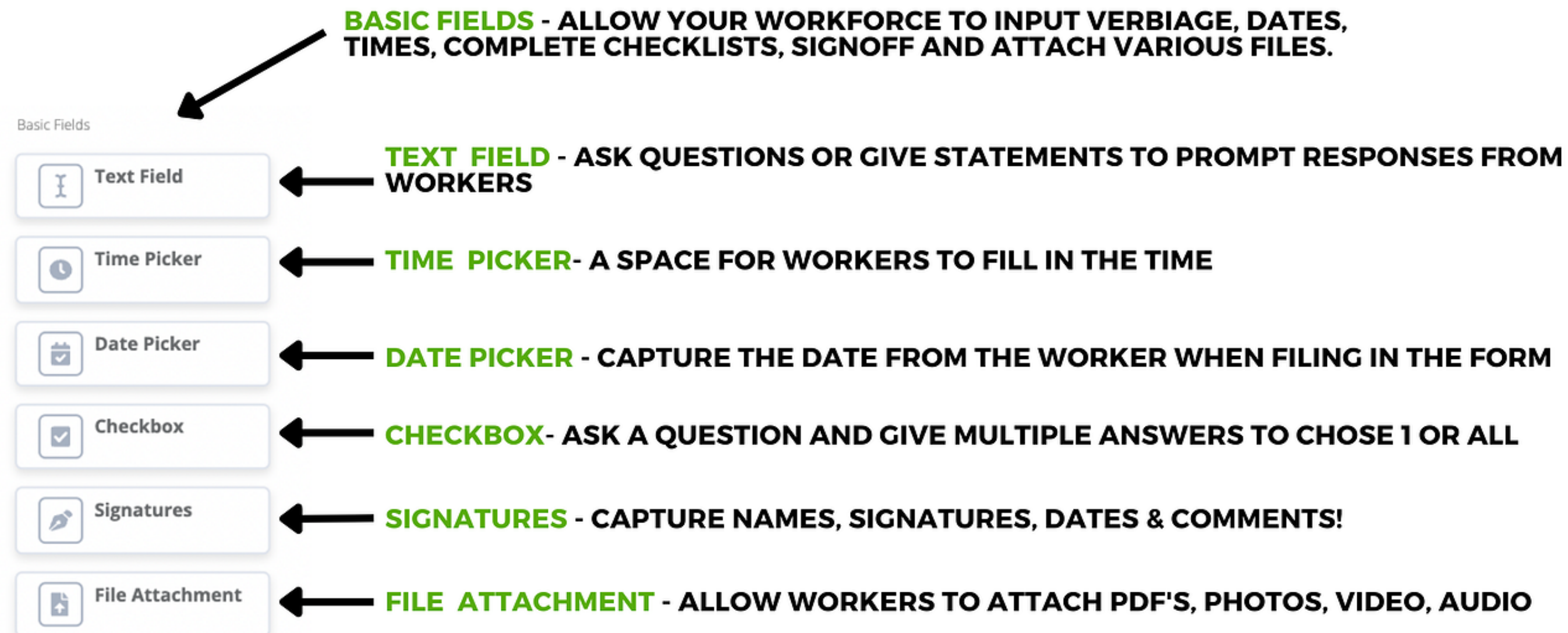


# Basic Field Elements

3

Basic Fields

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





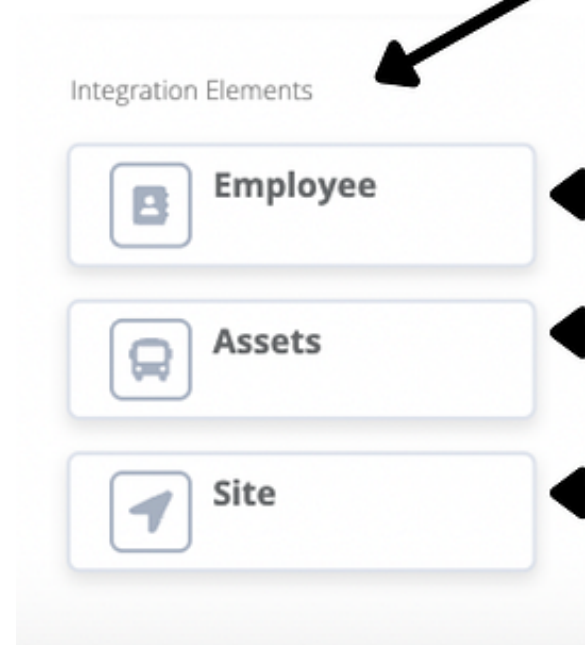
# Integration Elements

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!

The screenshot displays the 'Build' tab of the 'Inspection Building Element' interface. On the left, a sidebar lists various elements: 'Save Form', 'Checkbox', 'Signatures', 'File Attachment', 'Integration Elements' (Employee, Assets, Site, and Inspection). The 'Inspection' element is highlighted with a red box. In the main workspace, the 'General Inspection Items' element is selected and highlighted with a red box. It shows 'Site Inspection', '4 Sections', and '4 Inspection Items'. Below the element name is a dashed box with the text 'Click Element to Insert Here'. To the right, the 'Element Properties' panel is visible, containing the 'Inspection Checklist Element' description and a 'Settings' section. The 'Settings' section includes the 'Element Organization Label' set to 'General Inspection Items' and a 'Recommended' note: 'Added to your Form Design Elements. This helps you keep your templates organized and easier to edit in the future'. A black arrow points from the top text to the 'General Inspection Items' element, and another black arrow points from the 'Inspection' element in the sidebar to the 'Settings' section.

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

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

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

Open the **Response Editor**

# Inspection Element

5

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 two overlapping UI windows. The top window, titled 'Inspection Section Modal', has three red boxes highlighting the 'Section Header (Recommended)' field with the text 'Exterior Vehicle 360 Walk Around', the 'Section Description (Recommended)' field with the text 'Inspect each item in the following inspection by completing a 360-degree walk around the exterior of the truck. Fail - Minor', and an image upload area with a truck icon and a 'Scre...' button. The bottom window, titled 'Inspection Items', shows a list of items. The first item is 'Windshield is free from significant cracks or chips which impair line of site or structural', with a red box around its reorder handle (three dots) and another around its delete handle (trash icon). Below this list is a red box around the 'Add Inspection Item' button. To the right, a 'Contents:' panel shows a list of sections: 'Exterior Vehicle 360 Walk', 'Interior Vehicle Inspection', 'Fluids and Mechanical', and 'Load Securement Checklis'. Each section has edit and delete icons. A red box highlights the 'Add Inspection Section' button at the bottom of this panel.



# Inspection Element

»» What your Workers See!

5  
Inspection  
Element

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

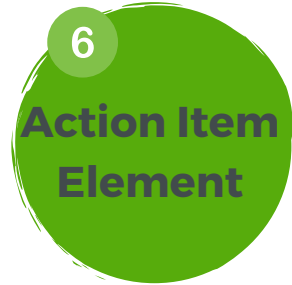
**1**  
Click to add  
the element to  
your form  
design

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 and a red 'NEW' tag. A red box also highlights the 'Safety Meeting Action Items' element in the main form design area. A red box on the right side of the interface shows the 'Element Properties' for the 'Action Item Element', including a description and settings. A large black arrow points from the 'Action Item' element in the sidebar to the 'Safety Meeting Action Items' element in the form design area. A smaller black arrow points from the 'Safety Meeting Action Items' element to the 'Element Properties' panel.

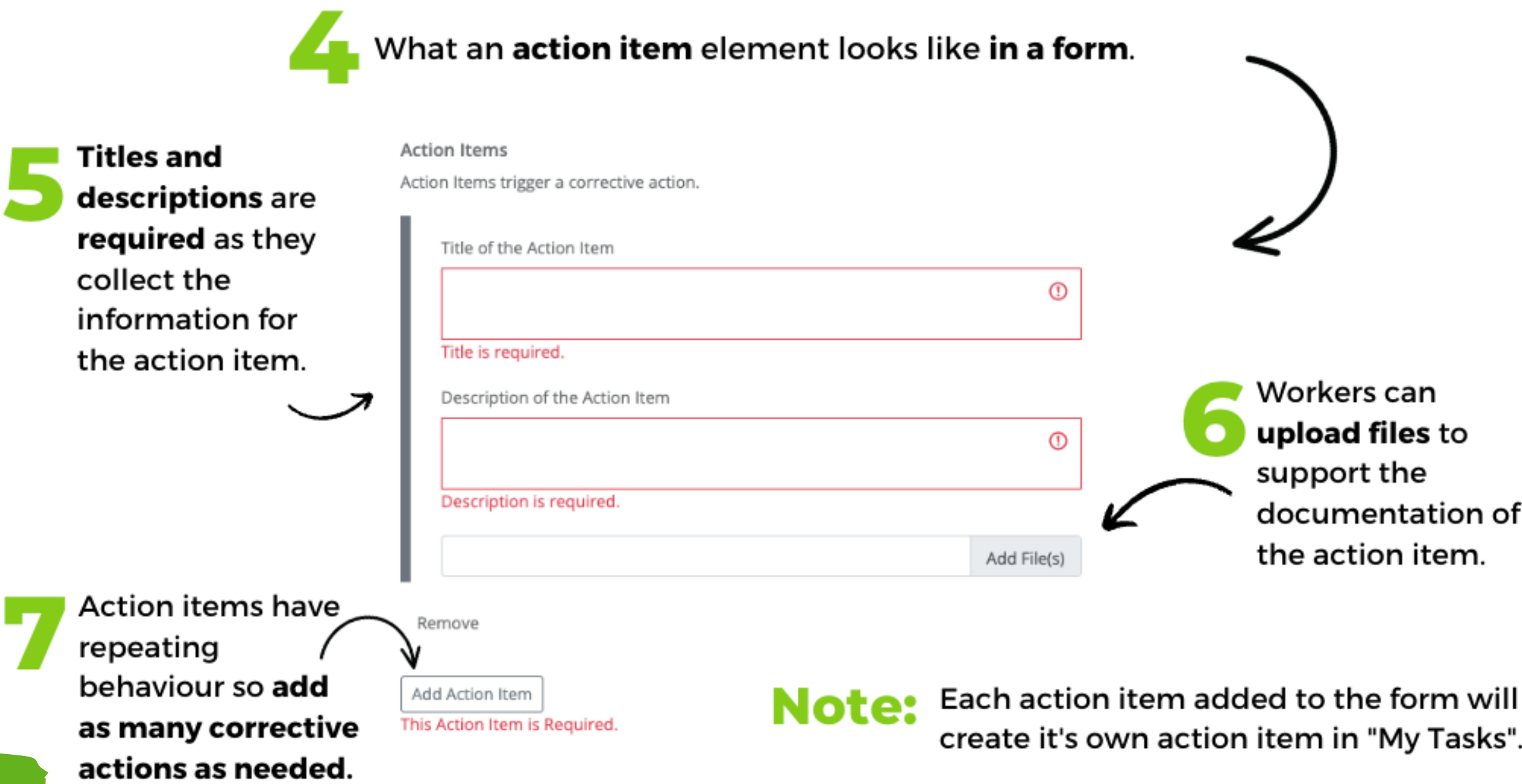
**3** Action items can be made as a required field, but most cases such as Safety Meetings, this can be left as optional.



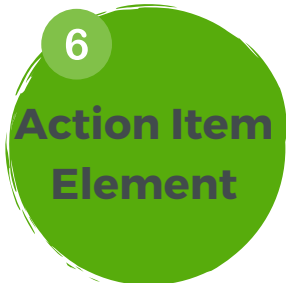
# Action Item Element



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



# 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

Icy Walkway is a hazard ⓘ

Title is required.

Description of the Action Item

Need to have a shop hand shovel and gravel the walkway asap ⓘ

Description is required.

Add File(s)



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

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	CF000000000-132	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

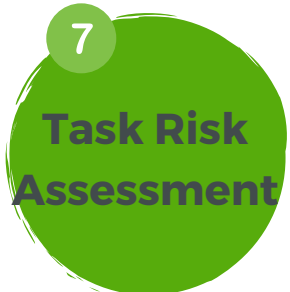
The screenshot shows the 'Form Designer' interface. At the top, there's a 'Save Form' button and a text prompt: 'Provide a name for this form to save it. Or don't specify a name, and use as a sandbox.' Below this is a navigation bar with 'Settings', 'Build', and 'Preview' tabs. The 'Build' tab is active. On the left, a sidebar lists 'Integration Elements' including 'Employee', 'Assets', 'Site', 'Inspection' (marked NEW), 'Action Item' (marked NEW), and 'Task Risk Assessment' (marked NEW). An arrow points from the 'Task Risk Assessment' tile in the sidebar to the main canvas. The main canvas has a 'Click Element to Insert Here' placeholder. An arrow points from the 'Task Risk Assessment' tile in the top bar to the 'Element Properties' panel on the right. The 'Element Properties' panel shows the 'Risk Analysis Element' description and 'Settings' for the 'Element Organization Label' and 'Required Field?' (a toggle switch).

**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.

A screenshot of a web form titled 'Task Steps'. It contains a message: 'Task steps include task step description, hazard recognition, risk assessment, controls to mitigate hazards, and risk assessment after controls are in place.' Below this is a large grey box with three horizontal lines and the text 'No Task Steps Created Yet' and 'Click "Add a Task Step" below to begin'. At the bottom left is a blue button labeled 'Add Task Step'. At the bottom right is a dashed line with an arrow pointing right, labeled 'Click Here to add task step details'.

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.

A screenshot of a 'Task Steps' pop-up form. It contains the following sections: 'Task Step' with a text input field containing 'Attach trailer to pickup' and a green checkmark; 'Hazards for this step' with a text input field containing 'Damage to property, injury to workers in area, busy work area with other crews close by' and a green checkmark; 'Risk Assessment' with two dropdown menus: 'Severity' set to 'Serious' and 'Probability' set to 'Occasional'; 'Controls to Mitigate the Hazards' with a text input field containing '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' and a green checkmark; 'Mitigated Risks' with two dropdown menus: 'Mitigated Severity' set to 'Moderate' and 'Mitigated Probability' set to 'Remote'; and a final text input field containing 'Mitigations and/or management activities properly designed and operating. Routine procedures in place. No further mitigation required.' At the bottom right are two buttons: 'Cancel' and '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.

<b>Task Step 1</b> Attach trailer to pickup	
<b>Hazards</b> Damage to property, injury to workers in area, busy work area with other crews close by	<b>Risk Assessment:</b> <b>Severity:</b> 3 — Serious <b>Probability:</b> 3 — Occasional <b>Evaluated Risk:</b> 9
<b>Controls</b> 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	<b>Mitigated Risk:</b> <b>Severity:</b> 2 — Moderate <b>Probability:</b> 2 — Remote <b>Mitigated Risk:</b> 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  
SECLECTED ELEMENTS...**

Form Designer

Home / Settings / Form Designs / Editor

Save Form Last Saved at 8:54:15 AM Publish Form

Form Elements

Layout and Contents

- Header
- Paragraph
- Layout Line
- List
- Image Embed
- Video Embed
- Link

Basic Fields

- Text Field
- Time Picker
- Date Picker

Build

- Starting Place (Header)
- Instructions (Paragraph)
- Repeatable
- Line Light
- Instructions to Follow (List Number)
- Workflow Image (Image Embed)
- Line Medium
- Build Tab (List Bullet)
- Survey (Checkbox)
- Name & Signature (Signatures)

Group Properties

Create Group from Selected

The selected form fields can be grouped together as a custom field. This is helpful when you have to make repeating units of a complex form element. Note: Grouping groups is not available at this time.

Create Group

Create Repeating

Ungroup

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 on the right side of the interface. It is divided into several sections, each highlighted with a red box and an arrow pointing to it from the left. The sections are: 'Element Properties' (the title bar), 'Text Field Properties' (a green header with a note 'This will only apply to the selected fields.'), 'Settings:' (a green header with a gear icon), 'Element Organization Label' (a text input field with a note 'Recommended - Added to your Form Design Elements. This helps you keep your templates organized and easier to edit in the future'), 'Required Field?' (a toggle switch set to 'On' with a note 'Toggle on if this field will be required to complete a form for your workers.'), 'Single Line / Multi Line' (radio buttons with 'Single Line' selected), 'Contents:' (a green header with a document icon), 'Text Field Statement/Question:' (a text input field with a note 'What is the statement you would like your form users to respond to?'), 'Placeholder Text' (a text input field with 'Optional' entered and a note 'Gives example for what they may place in the text field.'), 'Help Text' (a text input field with 'Optional' entered and a note '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.'), and 'Optional' (a checkbox).





# 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, there's a breadcrumb trail: 'Home / Settings / Form Designs / Editor'. Below this, a 'Save Form' button is visible, followed by the text 'Last Saved at 8:48:24 AM'. The main workspace is divided into three panels. On the left is the 'Form Elements' panel, which has a 'Layout and Contents' section with icons for Header, Paragraph, Layout Line, List, Image Embed, Video Embed, and Link, and a 'Basic Fields' section with icons for Text Field, Time Picker, Date Picker, and Checkbox. The middle panel has tabs for 'Settings', 'Build', and 'Preview'. The 'Preview' tab is selected and highlighted with a red box and a large number '1'. It displays a 'Work Permit' form with instructions and a workflow list. On the right is the 'Element Properties' panel, which shows 'Checkbox Properties' and 'Settings' for the selected element. The 'Publish Form' button is located in the top right corner of the interface, highlighted with a red box and a large number '2'. An arrow points from the 'Preview' tab to the 'Publish Form' button.



# 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](mailto:support@safetyevolution.com)