Create a new Permit, Drill or Meeting

Permits, drills and meetings are forms and are created as you need them. Log in and open your work space. To get a **BLANK FORM**, open **Onboard/ Forms/ Library**. There are three sections to the library: **In Progress , Awaiting Approval** and **Library**. Scroll down past the **In Progress** and **Awaiting Approval** sections to the **Library** section.

🐣 Assets
All Assets

Open the drill or meeting you want. On the right side will be an **attachments tab**. Open it up and click on the attachment name to **download and print the permit/ meeting/ drill sign in sheet**. Meetings, drills and permits can be **Finished** without attaching a scan of the completed form. File the paper forms in the proper binder in the TDI Binder system.

1 Library 🔂 Histor	y	Helm record num	ber				
C Drill-Abandon Si	hip	External Number: FORM-1	2) mo Do	8 t	Discard 10	Finish Now
Assert *		Division	Shawri in	Dequency	Tags		
Select on mint		TDI-Brooks International	Bridge, Engineering	On Demand			
Filed by *		Filed *					
Select a name	+	04/29/2020 20:10	A state barrier				VC
			Attachme	ents tab —			7 8

**Every time you open a form, it creates a new Helm record number (at the top of the form). If you fill in ANY part of the form, it will save the record. If you don't fill in anything, it will NOT save the record.

In this case, I opened the form just to print it out – I don't want to create a new record. So I didn't fill in any of the form or change the date.

Hot Permit Pro	cedure	External Num	ber: FORM23	•	9	Б	88.0
hish Later		-		Channel In	n.		
Asset *		Division		Shown in	FIE	edneury	
Asset * Select an asset	[7]	TDI-Brooks Int	ernational	Engineering	(On Dem	and
Asset * Select an asset Filled By *	*	TDI-Brooks Int	ernational	Engineering	(Dn Dem	and

Click the BACK/ Finish Later button to go back to the Forms/ Library list.

Expand the In Progress list. You will see the last form saved was FORM21. No new FORM23.

In Progress 🛛 🗸		
II Form	•	975k.,
Hot Permit Procedure	FORM	18
Hot Permit Procedure	FORM	19
Hot Permit Procedure	FORM	21
Supervisor Incident Report Last form n	umber saved	

When you open a form, the date and time will automatically fill with the current date and time. Change the FILLED to match actual date and time of the meeting/ inspection/ drill. Select your name from the "Filed By" list. (Start typing and it will fill in matching names.)

Hot Permit Procedure	External Number:	FORM19
Asset *	Division	
Brooks McCall *	TDI-Brooks Interna	tional
Filled By *	Filled *	
Shannon Smith	05/07/2020 10:34	4

Finishing a Permit, Meeting or Drill In Progress

To go back and finish an **In Progress** permit/ meeting/ drill, open **Logs/ Forms/ Library**. Click the expand arrow on the **In Progress** section to see all forms that have not yet been finished. Click on any **In Progress** record to open it.

n Progress 🔘 🗸	
≣ Form	 🗄 Externa
Hot Permit Procedure	FORM18
Hot Permit Procedure	FORM19
Hot Permit Procedure	FORM21

Finish any required fields and click **Finish Now**.

									\frown
() H	lot Permit Procedure	External Number:	FORM18	 5	10.1	E 1	81	Discard	🕞 Finish Now
-									

Very important to click the "Finish Now" or your work will not be saved!! It will even ask you again to be <u>very</u> sure. So FINISH TWICE.

		Finish this form?	
Discard	Finish Now	Cancel	Finish New

Open the **History** tab to see the completed drill. The **External Number** is the Helm record number.