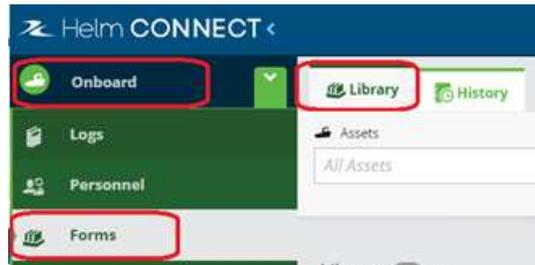# Create a new Permit, Drill or Meeting

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.


 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.

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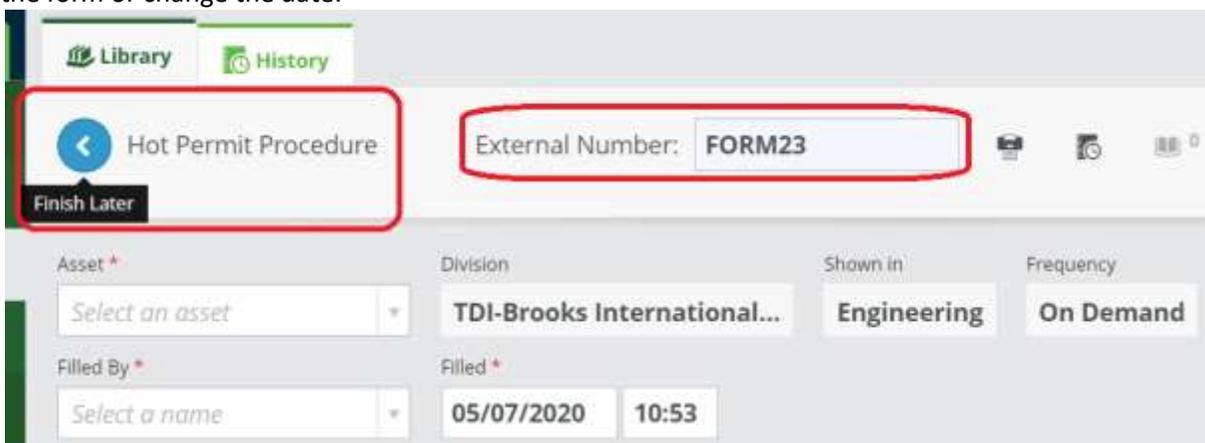
Click the **BACK/ Finish Later** button to go back to the **Forms/ Library** list.

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

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.)
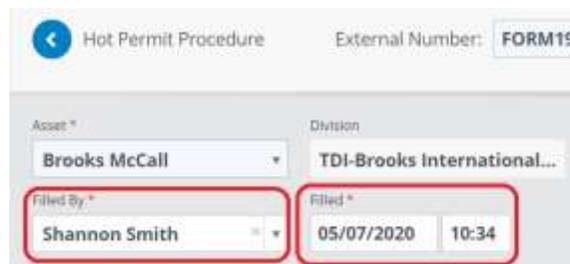
Finishing a Permit, Meeting or Drill In Progress

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.

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

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

Discard   Finish Now   Finish this form?   Cancel   Finish Now

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