

# Can I Do Risk Assessments with Trackplan?

The Form Designer feature of Trackplan is a great tool for creating many different types of forms, for example risk assessments. These risk assessments can then be attached to jobs or planned schedules, and set as required to ensure that they are read and completed before the job task can be signed off.

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## Attaching a Risk Assessment Form to a Job

In the *Forms* tab of the *Job Details* page, you can view and manage forms that have been added to a job:



On the right-hand side of the screen is the option to *Add Form*:



This will prompt a pop-up window with a list of forms for you to choose from:



When you select a form, you will be taken to a preview. Selecting *Back* will return you to the *Forms* tab, and the new form will be in the *Form Results* list:



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## Attaching a Risk Assessment Form to a Planned Schedule

There are two ways to add a risk assessment form to a planned schedule:

1. The *Forms* section of the *Planned Schedule Details* page allows you to add either an existing form, or create a new form using the *Form Designer* feature.
2. You can upload a risk assessment document from your local device to the main Trackplan application in the *Documents* area, which can then be attached through the *Documents* section of the *Planned Schedule Details* page.

### 1.A Adding an Existing Form to a Planned Schedule

In the *Forms* section of the *Planned Schedule Details* page, clicking *Add Form* will give you two options:



Select *Attach Existing Job Form* to choose from the already available forms:



### 1.B Creating a New Form Using the Form Designer

The *Create a New Job Form* option, however, will allow you to design a new form using the Form Designer:



Selecting this option will prompt a pop-up window asking you to provide the new form with a name, choose a category and type, choose if this form is required in order to complete a job, and if completing this form completes the job task:



Once you have filled in that information, select *Confirm* and you will be taken to the Form Designer so you can create your new form.

## 2. Uploading a Document From Your Local Device

Risk assessment documents can also be uploaded to the main Trackplan application, through the *Documents* area:



These documents can then be added to a planned schedule in the *Documents* section of the *Planned Schedule Details* page:



Selecting *Add Document* will prompt a pop-up window allowing you to select a document from a list:



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**Risk Assessment forms** can be associated with specific resources. In the *Resource Details* page, you can add a default form that will be attached to every job instructed to this resource. This form must be completed by the resource, before they can accept the job:

