User guide

Field safety, compliance and the Mine Record Book, screen by screen.

Updated: 02/11/2026 10:12 AWST

Every page of the online help is a chapter here, in the order of the help home. The contents on the next page, and the bookmarks panel of your PDF reader, jump to any chapter or section, and the links between pages jump within this file. The online help, searchable and always current:
https://www.terrasearch.com.au/xplore-shield-help/help

Release 1.0.0.21

Terra Search

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1. Xplore Shield help

Updated: 22/10/2026 16:30 AWST
App version 1.0.0.21

Xplore Shield is an app for exploration businesses that runs the field side of a mine safety management system (MSMS): who and what is in the field, the forms crews submit, reminders before things lapse, hazards and incidents followed through, and a mine record that cannot be quietly changed. This is its help. Use the search box on this site to find a page, or start below. In the app, **Help** in the blue bar at the top of a main screen opens the page for that screen.

Start here

- Why an exploration MSMS matters, and how Xplore Shield helps
- Quick start: what is new for beta testers, the licence check and your first Mine Record Book entry.
- Release summary and change log: what each version changed.
- Microsoft 365 licence: what you need to open the app.
- Frequently asked questions
- Known behaviours in the beta
- Feedback and what happens to your report

The Mine Record Book

- Mine Record Book: find, add, correct and close entries, and attach files.
- Mine Record Book appointments: record a statutory appointment.

The screens

Screen	What it is for
Dashboard	A summary of your safety profile and what needs attention
Compliance	Who and what is in the field, and which forms are missing
Staff compliance, Equipment compliance, Comms compliance	One person's, one item's or one device's record on a project
Compliance form	Closing or commenting on a follow-up
Registers	Submitted forms: search, filter, preview, download, export
Hazard report, Incident report	Reviewing and updating a report
Databases	The lists of staff, equipment, comms, clients and projects
Staff database, Projects database, Clients database, Equipment database, Comms database	One record in each list
Equipment defects and work orders	Every fault an inspection reports, against its equipment; a work order as a PDF bundle for your fitter
MSMS	The safety management system library and your own files
Notifications	The bell, your notices, the For you view and the daily digest email
Settings	Who gets which reports, and when

Need a person?

If something stops you working, contact Terra Search directly, using the details in your welcome email, as well as sending a report in the app.

2. Why a mine safety management system matters for exploration

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

A **mine safety management system (MSMS)** brings an operation's safety policies, procedures, plans and records together so that the work is planned and run safely. In Western Australia, the Work Health and Safety (Mines) Regulations 2022 put the duty to have one on the mine operator, and the duty applies to **exploration operations** as well as to mines.

For an exploration business the hard part is rarely writing the system. It is running it day to day: small crews on remote sites, projects that start and stop, contractors who come and go, forms filled in on a phone with no signal, and records that have to be found again when an inspector, a client or an auditor asks.

How Xplore Shield helps

Xplore Shield is the app Terra Search uses, with the exploration businesses it works with, to run the field side of a safety management system and keep its evidence in one place.

- **Who and what is in the field.** People, vehicles, equipment and comms devices join a project's compliance list from the crew's own forms: journey management plans, check-ins, prestart meetings and safety briefings. See Compliance.
- **Forms from the field, kept as registers.** Hazard reports, incident reports, inspections, job safety analyses, prestarts and toolbox meetings are filled in on a phone or tablet and arrive in searchable registers, with the form's PDF. See Registers.
- **Reminders before things lapse.** Missing forms, expiring licences and certificates, services due and extinguisher tags out of date show on the Dashboard and go out in daily and weekly reports.
- **Hazards and incidents followed through.** Each report carries its risk levels, controls and status until it is closed or its investigation is finished. See Hazard report and Incident report.
- **A mine record you cannot quietly change.** The Mine Record Book keeps inspection records, notices, correspondence, notified incidents, control-measure reviews and statutory appointments. Entries cannot be edited or deleted; a mistake is fixed by a correction that names the entry it corrects.
- **The people and kit behind the work.** Staff records with licences, certificates and inductions, and equipment and comms records with services and inspections. See Databases.
- **Your safety documents to hand.** The MSMS library holds the shared safety management system documents and your own organisation's files.
- **History that stays.** A person, project or piece of equipment that records still point to cannot be deleted, so the evidence of what was done is not lost.

What Xplore Shield does not do

Xplore Shield is a tool for running and evidencing parts of a safety management system. It does not write your MSMS, it does not make an operation compliant, and it does not replace the operator's own duties, risk assessments and reviews. Check your obligations against the regulations and your regulator's guidance.

Questions

Does an exploration company need a mine safety management system?

In Western Australia, yes: the duty to establish and implement an MSMS applies to exploration operations as well as to mines. Other states have their own rules.

Is Xplore Shield an MSMS?

No. An MSMS is your organisation's system of policies, procedures and plans. Xplore Shield helps you carry out the field parts of it every day and keeps the records that show it was done.

Can it be used where there is no mobile signal?

The field forms are filled in on a device and sent when it next has a signal. Xplore Shield then records them. A form that arrives a day late is still kept, but it does not clear a miss recorded for the day before.

Who can use Xplore Shield?

Terra Search staff and the exploration businesses that Terra Search sets up as subscribers. During the beta it is open to invited testers. See the Quick start.

Related pages

- Xplore Shield help
- Release summary and change log
- Frequently asked questions

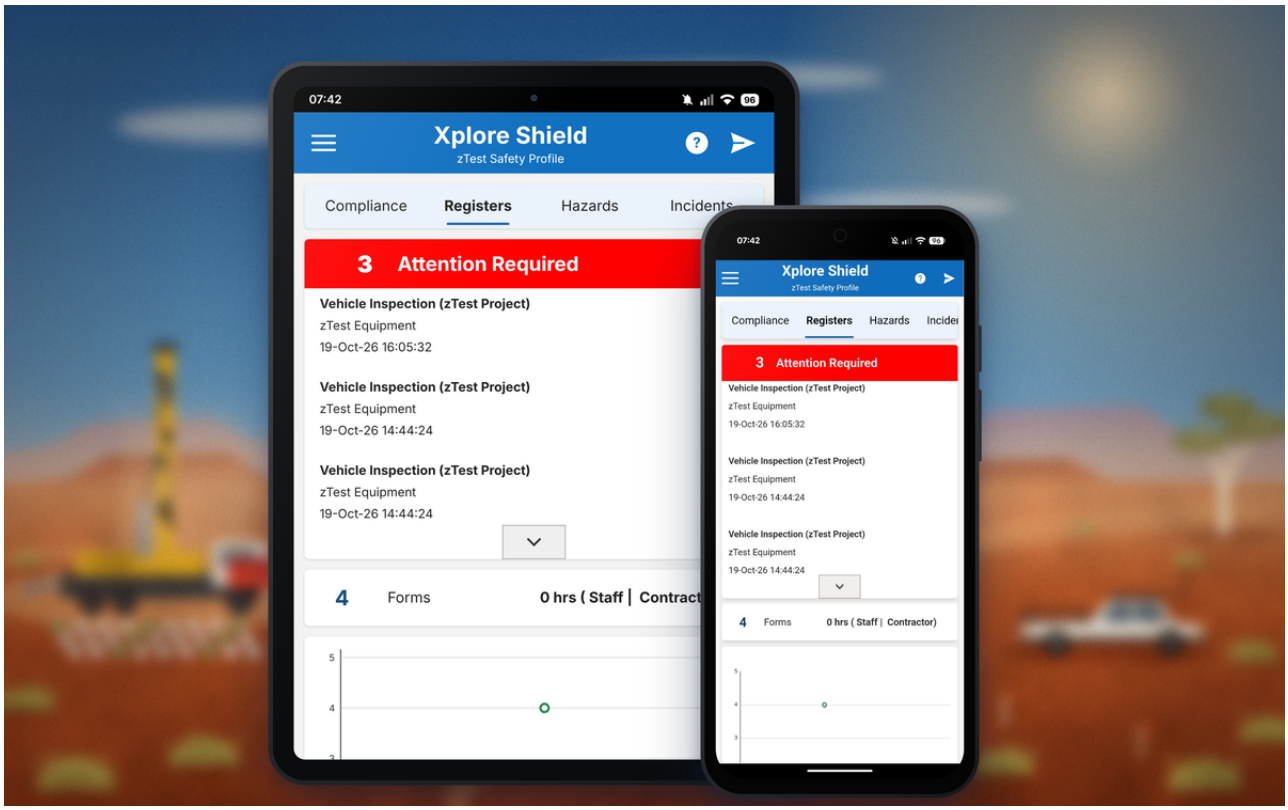
3. Xplore Shield beta: what changes for you

Updated: 28/10/2026 15:50 AWST
App version 1.0.0.21

You use Xplore Shield today. Terra Search has rebuilt it, and before the new version replaces the one you use, we would like you to test it with your own work for about two weeks. This page says what changes for you, why the records it keeps matter under the law, and how to start.

Three things to try first

1. **Mine Record Book.** Each project's statutory record in the app: inspection records, notices, correspondence, notified incidents, control-measure reviews and statutory appointments, with their files. Entries are added and corrected, never edited or deleted. They are not yet sent to SRS.
2. **Your phone and tablet.** Every screen now lays itself out for a phone, a tablet or a computer, the lists as cards on a phone. In the Power Apps app, choose the Xplore Shield version marked **Test**: that is the beta. The steps to get it are in Terra Search's email and in the online quick start.
3. **Registers and Compliance, one list each.** Pick a register or a tab, filter it, and search back past the last 30 days for older forms.



What changes: 16 new features, 14 improvements, 13 fixes

Counted against the Xplore Shield app you use today. Fixes of faults that only the beta's own earlier versions had are left out.

16 new features	14 improvements	13 fixes
Mine Record Book: each project's statutory record, with files	**Registers** and **Compliance** each one list: pick a register or tab, and search back past 30 days	Dashboard counts match the lists under them
Statutory appointments, shown on the project	Screens refresh themselves every 15 seconds	Pickers no longer keep an old choice
Feedback from the screen you are on	An empty list says the filters emptied it	A new client filter clears the old project
Help for the screen you are on	Equipment and comms types follow the lists	Coordinates kept after a mistyped edit

Database deletes refused if that item is being tracked in a compliance list	A refused save names the missing fields	Exports no longer broken by an apostrophe
Not held for staff without a mobile	Dates shown the same way everywhere	Export names safe with / or :
Names as on an identity document	**Mobile screens**: laid out for a phone, a tablet or a computer	Light vehicles flagged when a service is due
Phone and email boxes checked as you type	Fastfield logins & passwords now copyable	Lapsed extinguisher tags always listed
Your profile in the blue bar, the version in the menu, the profile selector under Settings	Settings as one page of fields; the Dashboard's dates in their own row	An unchanged form no longer asks to save
Filters shows when a filter is on	The logo on every screen and the app icon	Incident and tracking times kept as saved
Attention Required counts open hazards and incidents	**What's new** keeps your ticks	**Sync** cannot be started twice
A note after a save says when FastField gets the change	Pickers you type into	Leaving a form, **Discard** says what it does
A refused delete opens the records that stop it	Exports kept in the work orders library, one tap	Export times in your own time zone
Equipment defects collected per item: open until marked rectified, each report a tap away	A busy card says what the app is doing	
Work order: the open defects as a PDF, each inspection report beside it on the Intranet		
What's new; **Notifications**: bell, digest		

Every change, release by release: **www.terrasearch.com.au/xplore-shield-help/change-log**, also reached from the help home or **Help** in the app.

The law the records support

> **Xplore Shield helps you keep the records; it does not make an operation compliant, and this page is not legal advice.** Responsibility for safety stays with your exploration manager.

Under Western Australia's work health and safety Act, mines regulations and codes of practice, a mine operator is expected to:

- establish and implement a mine safety management system;
- keep a mine record, statutory appointments included (the **Mine Record Book**);
- appoint an exploration manager before exploration starts, absent a site senior executive;
- keep people competent for their tasks (**Staff Compliance**), with communication and emergency plans that suit remote work (**Comms Compliance**).

> **What not complying can lead to.** Fines of up to $35 000 under the regulations. Inspectors can issue an **improvement notice**, or a **prohibition notice** that stops work posing a serious, immediate risk; ignoring either brings fines of up to $285 000 and $570 000 respectively.

Staff whose mobile number is not recorded

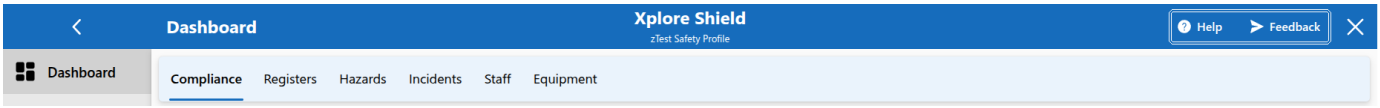
Some crews work under their own employer's safety system, and that employer may prefer not to record their mobile numbers with us. You no longer need to enter a placeholder or made-up number for them.

- **New option available:** anyone who can open **Settings** for the profile can now turn on the **Mobile numbers not held** setting.

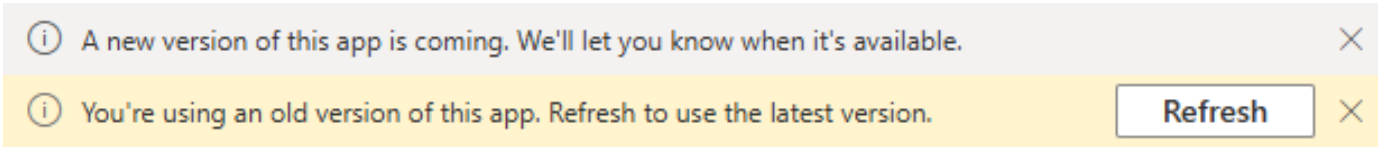
- **Updating staff:** once it is on, you can leave a staff member's mobile number as **Not held**, or enter a real number if one is provided.
- **Existing placeholders:** please don't update or clear the placeholder numbers already in the system. Our automated text messaging is still being updated to handle blank numbers safely, and removing placeholders now may cause messaging errors. We will let you know as soon as it is safe to clean them up.

Start testing

1. **Check your licence.** It must include **Power Apps for Office 365** rights. Most Microsoft 365 business and enterprise plans do; the free Power Apps Developer and Power Automate Free plans are **not** enough on their own. If unsure, ask your IT administrator, and tell Terra Search before you buy anything.
2. **Sign in.** Open the new version from the link in Terra Search's email and sign in with the account you use for Xplore Shield today. The first time, it may ask to connect to SharePoint: allow it.
3. **Check your profile.** Open **Dashboard**: you should see your own organisation's people, equipment, projects and registers.
4. **Use it for your real work.** The new version works on the same records as the app you use today. Make a Mine Record Book entry: choose your project, **New entry**, the **Kind of entry**, a **Summary**, then **Save entry**. Entries are statutory records: to fix a mistake, choose **Correct**.
5. **Tell us what you find. Feedback** in the blue bar sends a report from the screen you are on; **Help** beside it opens that screen's help page. Terra Search reads every report. If something stops you working, contact Terra Search directly.

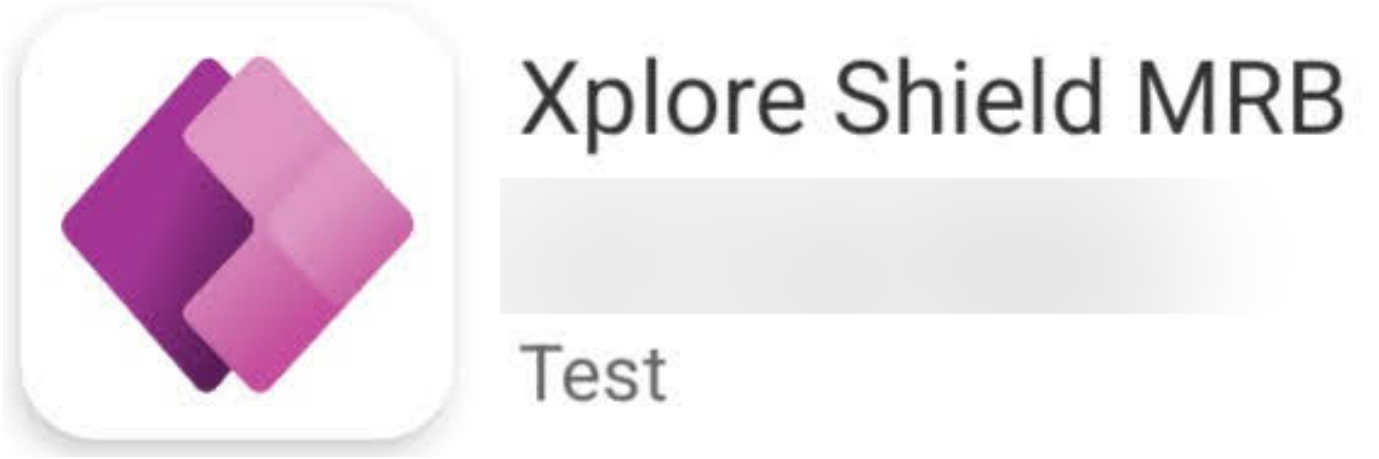


> **"Refresh" is always the right answer.** Work on the beta continues in the background, so the app may say a new version is coming, then that you are using an old version. When you see **Refresh**, save what you are entering, then choose it.



Get the app on your phone or tablet

1. Install **Power Apps** from the App Store (iPhone, iPad) or Google Play (Android).
2. Open it and sign in with the account you use for Xplore Shield today.
3. The first time, open **All apps** and search for **Xplore Shield MRB**. After you open it once, it shows on **Home**.
4. Choose the tile marked **Test**: that is the beta. The tile named **Xplore Shield**, without Test, is the app you use today.
5. The first time, allow the connections it asks for.
6. To keep it at the top, swipe left on its tile and choose **Favorite**.



Where to go next

Why an exploration MSMS matters, Release summary and change log, Frequently asked questions and Known behaviours in the beta.

4. Xplore Shield release summary and change log

Updated: 02/11/2026 10:12 AWST
App version 1.0.0.21

This page lists each release of Xplore Shield, newest first, with what changed for the people who use it. Each later release is added at the top. Dates are the day a release reached the test environment the beta runs in.

Release summary

- **1.0.0.21, 02/11/2026: MSMS previews again, with Close; every Registers filter in view; What's new tidied.** PDFs on the MSMS screen preview again, full screen as on the Registers screen, with **Close** and **Download**; when one cannot load, the preview says so plainly; **Reset All** and every filter on the Registers screen are in view, or a line says to scroll for them; the What's new tick-boxes are one size and in line, and it links to this page. See MSMS and Registers.
- **1.0.0.20, 29/10/2026: Category A - do not operate, repeat faults as one card, open defects on the Equipment list, Export on every register.** Each inspection item's category follows how far its fault contravenes the WA and Queensland mining regulations, so a dead two-way radio, satellite phone or tracker is now Category A - do not operate, with the regulations on the help page; a fault reported again on one asset shows as one card with how many times and from when to when; the Equipment tab shows each asset's open faults and worst category beside its name, worst first; **Export** works on every register; the **Remaining** card reads as a whole number, amber when due soon and red when overdue. See Equipment defects, Databases and Registers.
- **1.0.0.19, 28/10/2026: pickers you type into, exports kept in the work orders library, and one busy card.** The record pickers on every form and in the filter menu narrow as you type; **Export** keeps the CSV in the Intranet's **Xplore Shield Work Orders** library in an **Exports** folder of your own and downloads it in one tap, its times in your own time zone; while the app saves, loads a register, exports or prepares a work order, a shade and a card say so; a refused compliance save names and shades the fields it needs; **New** on a compliance form brings the new device or asset back chosen. See Registers and Equipment defects.
- **1.0.0.18, 27/10/2026: the Xplore Shield logo, and What's new that remembers your choices.** The logo is on the title bar of every screen, on the app's icon and at the head of every help page and PDF; the What's new notice lists each new feature with a tick box, **Remind me next time** beside **Ok** sets them all, and your ticks are kept for your next start, the notice staying away once every row is unticked. See Dashboard.
- **1.0.0.17, 27/10/2026: the work order's panels, without OneDrive.** Each defect card's bold line is the item alone, with the date, the reporter and the inspection on the line above; the Open list runs by category, A first, then latest first. **Work order** shows a **Preparing the work order…** panel with **Cancel** while the bundle is made, then a **Work order ready** panel with **Cancel**, **Download Work Order** and a switch **Include inspection reports** that also opens the order's folder; **Work order** is back once the panel closes. The work order no longer needs your OneDrive: it is kept in the Intranet's **Xplore Shield Work Orders** library, for you and the Intranet's owners, its defects by category then date. See Equipment defects and work orders.
- **1.0.0.16, 26/10/2026: each fault item by item, with a severity category.** Every equipment defect is now one faulty inspection item in the crew's words with the action taken, named for the item (**Tyres**, **2-way radio**), and carries a category chip: A unsafe and out of service, B fix before next use or by a stated time, C monitor. A filter shows one category; **Set category…** changes it and records who, when and from what; the work order gains a **Cat.** column. The open defects from before were split into their items. See Equipment defects and work orders.
- **1.0.0.15, 23/10/2026: equipment work orders, What's new, and notifications.** Every fault an inspection reports is collected against its piece of equipment, open until marked rectified, with its report a tap away; a work order gathers the open ones as a PDF with each report beside it in your OneDrive; a What's new notice, once per person per release, with a short tour; and notifications: a bell in the blue bar that counts what is unread, a panel of your notices with Open, Dismiss and All read, a For you view the Dashboard opens on, and one daily digest email per safety profile in place of an email per addition (switched on for people one profile at a time during the beta). See Notifications.
- **23/10/2026: statutory appointments from the field.** FastField's **Mine Record Book Entry** form records a statutory appointment, its appointee picked from your profile's current staff or typed with your attestation, the signed letter photographed into its report; the project's **Statutory appointments** update as they do for one made in the app. No app release.
- **22/10/2026: Mine Record Book entries from the field.** Field crews send Mine Record Book entries from FastField's **Mine Record Book Entry** form, offline if need be; each submission becomes one entry with its report in **Files**. No app release.
- **1.0.0.14, 20/10/2026: the phone view finished.** The Registers and Databases lists show as cards on a phone; Settings is a page of fields that scrolls as one; the Dashboard's dates sit in a row of their own and its charts suit a tablet; a refused delete opens the records that stop it; the equipment Save and the MSMS preview fixed.
- **1.0.0.13, 19/10/2026: the phone screens, copyable FastField logins.** The app lays itself out for a phone, a tablet or a computer; Settings shows each FastField login and password with a copy button; the safety profile selector sits under

Settings in the menu.

- **1.0.0.12, 15/10/2026: MSMS previews.** PDF previews in Client MSMS work. Testers start on this release.
- **1.0.0.11, 15/10/2026: saves that say when FastField gets them.** A note after each save in the Databases says when the change reaches the field forms, with the **Fastfield** button marked until you sync; MSMS uploads and new folders switched on; the Registers export downloads in one step.
- **1.0.0.10, 14/10/2026: filters that say they are on.** The version at the foot of the menu, Xplore Shield and your safety profile in the blue bar, a Filters button that shows when a filter is in use, an empty list that says the filters emptied it and resets them, one-step downloads in the Mine Record Book, and fixes.
- **1.0.0.9, 14/10/2026: the beta release.** The whole refactoring pass in one release: faster registers and compliance lists with search over the whole list, Feedback and Help in the app, database deletes refused if that item is being tracked in a compliance list, staff without a mobile number, and many fixes. Testers are invited from this release.
- **1.0.0.1 to 1.0.0.8, 01/10/2026 to 08/10/2026: before the beta.** The Mine Record Book and its attachments and statutory appointments, the first refactor, and the first round of fixes, used by Terra Search while it was built.

Change log

1.0.0.21 (02/11/2026): MSMS previews and Close, Registers filters in view, What's new tidied

- **MSMS previews.** Since 1.0.0.20 a PDF on the MSMS screen did not preview and a red error showed; PDFs preview again. The preview now fills the screen as a form's does on the Registers screen, with **Close** and **Download** at the top (at the foot on a phone) and a zoom hint on a computer. When a preview cannot load, it says "The preview could not be loaded. Open the file with the download icon instead.", with no red error.
- **MSMS file names** on a phone show up to three lines in their row.
- **Registers filters.** On a large screen every filter and **Reset All** are in view; on a smaller one a line at the panel's foot reads "▼ Scroll for more and Reset All". The phone view is unchanged.
- **What's new.** Every tick-box is one size, **Remind me next time** sits in line under them, rows close up, and "See the full list of changes here" opens this page.
- **What's new** for 1.0.0.21 lists the three.

1.0.0.20 (29/10/2026): Category A - do not operate, repeat faults as one card, open defects on the Equipment list, Export on every register

- **Category A - do not operate.** Every inspection item's default category was derived again from the Work Health and Safety (Mines) Regulations 2022 (WA) and Queensland's Mining and Quarrying Safety and Health Regulation 2017: a fault that removes a control the regulations require before plant may operate, or the means of calling for help that remote or isolated work requires, is Category A. Seventeen items moved to A: the two-way radio, satellite phone and tracker items on the vehicle, UTV, quad bike and loader inspections, the caravan's emergency communications, and the generator's guards. Category A's name on the card, the help and the work order is now **Category A - do not operate**. The eight open defects on those items in the beta were re-categorised, each with a note of the change; new reports take the new defaults.
- **Repeat faults as one card.** On an asset's Defects panel, open reports of one item combine into one card, whatever the words, the reporter or the inspection: **Reported 4 times, 5 Oct to 24 Oct 2026 · latest by** the last reporter, the highest category any report gave it, the latest words, and a **4 reports** □ button that opens the reports one card each, □ **All defects** to come back. Choosing the card, **Set category…**, **Mark rectified** and the work order act on every report in it; History is as it was. The panel's title counts the faults, and the reports behind them when more.
- **Open defects on the Equipment list.** The Databases screen's Equipment tab has an **Open defects** column beside the name, □ **3 open · A** with the category's dot, and a **Service** column saying when the service or the extinguisher is overdue or due; the list runs worst category first, then the most urgent service, then the least left to the next service, then the name; the Fire Extinguisher Expiry column shows a date; on a phone each equipment card carries the same badge, or **no open defects**.
- **Export on every register. Export** works on Take 5s, Equipment Inspections, Drill Rig Inspections, Check-Ins, JMPs, ERPs, JSEAs, Inductions and the Compliance Register too; each CSV leads with Submitted On, Sent By, Client and Project then the register's own columns, dates in your own time zone; the Compliance Register's carries Client.
- **The Remaining card.** On an equipment record **Remaining** reads as a whole number with separators, **due soon** in amber under 500 or within 14 days of the service date, **overdue** in red when the service is reached or its date has passed.
- **The work order** lists each fault once with its count and period and the numbers of its reports; the reports behind it are bundled in that order.
- **What's new** for 1.0.0.20 lists the five.

1.0.0.19 (28/10/2026): pickers you type into, exports in the library, one busy card

- **Pickers you type into.** The record pickers on every form and in the filter menu - client, project, person, equipment, device, type, the register picker, the Mine Record Book's site, appointee and position, and the profile pickers - are

boxes that narrow their list as you type, with a placeholder when empty. A short fixed choice, such as an hour or a minute, stays a dropdown.

- **Export kept in the work orders library. Export** writes the CSV into the Intranet's **Xplore Shield Work Orders** library, under **Exports** in a folder of your own that opens for you and the Intranet's owners alone, and downloads it in one tap: no OneDrive, and no browser tab flashing open. The file's date and time columns, Submitted On among them, are in your own time zone, not the server's.
- **One busy card.** While the app saves a form, loads a register, exports or prepares a work order, a shade covers the screen and a card says which: **Saving…**, **Loading…**, **Exporting…** or **Preparing the work order…**, with **Cancel** on the work order's. The Defects panel's own spinner and the Registers' "Creating File..." are gone; the card does their work.
- **A refused compliance save says what it needs.** On Comms Compliance and Equipment Compliance a save with a required field empty names the fields and shades them pale red, as the Staff Database does; the Compliance form's **Summary** is marked required and **Save** opens as you type in it.
- **New from a compliance form. New** beside the device or equipment picker on Comms Compliance and Equipment Compliance opens the database's new form and brings you back with the new device or asset chosen.
- **Retired types.** The Equipment Compliance **Type** picker no longer offers Vehicle or Quad Bike for a new record; an existing record keeps its type.
- **Compliance cards grow to their longest line.** A long Missing Forms line no longer scrolls inside its card, and a follow-up item's saved change shows in the card at once.
- **Who can switch profile.** The Terra Search staff who can switch safety profile are now those listed as profile switchers on Terra Search's own safety profile in the Intranet, not a list fixed in the app.
- **Settings' words.** The forms always sent list the Daily Report, and a project's send-all note says the switch adds to Settings' list and cannot turn a form off.
- **What's new** for 1.0.0.19 lists the pickers, the export, the saves and the busy card; the 1.0.0.15 notice no longer shows.

1.0.0.18 (27/10/2026): the logo, and What's new remembers

- **The logo.** Xplore Shield's logo on the title bar of every screen beside the safety profile's name (at the top of the menu on a phone), as the app's icon in Power Apps and on the loading screen, and at the head of every help page and on both help PDFs' covers.
- **The help says its version.** Directly under each help page's Updated line, the app version it describes.
- **What's new with tick boxes.** The notice opens with "Select a new feature below to read the write-up", one row per feature with a tick box at its left, **Ok** directly under the list and **Remind me next time** beside it. Every box is ticked to start; the master sets every row and shows a filled square when only some are ticked; your ticks are kept for your next start, per person, and once every row is unticked the notice stays away until the next release. **Take me there** and the tour stay.

1.0.0.17 (27/10/2026): the work order's panels, without OneDrive

- **The card's lines.** The bold line is the item's name alone (**Reversing alarm**); the plain line above carries the date, who reported it and the inspection it was found on.
- **The Open list's order.** By category, A first, then B, C and unrated, and within a category the latest inspection first. The filter is unchanged.
- **Preparing the work order. Work order** covers the screen with a **Preparing the work order…** panel while the bundle is made, since many defects take a minute or two; its **Cancel** leaves the work order unmade.
- **Work order ready.** A panel says how many inspection reports were bundled, with **Cancel** and **Download Work Order**; a switch **Include inspection reports** (off to start) also opens the order's folder in the work orders library. The **Download** and **Bundle** buttons of 1.0.0.15 are gone: the panel is the way to the PDF and the folder, and **Work order** is back as soon as it closes.
- **No OneDrive.** The work order is made on the app's own connection and kept in the Intranet's **Xplore Shield Work Orders** library, one folder per order that opens for its requester and the Intranet's owners alone; the app no longer asks for a OneDrive for Business connection.
- **The work order's order.** Its defects run by category, A, B, C, then not yet rated, and within a category the latest inspection first, as the Open list does.

1.0.0.16 (26/10/2026): each fault item by item, with a severity category

- **One defect per faulty item.** The intake reads each flagged inspection from FastField item by item: the item's name, the crew's words, the action taken and a default severity category from the item, instead of one card per inspection that said to see the report. The 116 open defects from before were split the same way into 180 item cards; 24 inspections flagged without an item marked stay as they were, to be rated by hand.
- **Severity categories.** A red A, amber B or blue C chip on each card: unsafe and out of service; fix before next use or by a stated time; monitor. A grey dash means not yet rated. The categories, their rules and what to do are on Equipment defects and work orders.

- **Filter and set.** A filter under the Open tab shows one category or the cards not yet rated. **Set category…** beside the note sets the chosen cards' category and records who changed it, when and from what.
- **History keeps the replaced records.** The earlier one-card-per-inspection records show in History as replaced by their item rows.
- **The work order** lists each item's category in a **Cat.** column beside its words.

1.0.0.15 (23/10/2026): equipment work orders and What's new

New:

- **A Defects panel on each equipment record.** Every fault reported on an equipment inspection form, collected against the piece of equipment: **Open** lists them oldest first with the date, who reported it, the inspection and the fault's words; **History** those marked rectified, with when, by whom and the note. Faults reported since July 2026 were brought in as open. See Equipment defects and work orders.
- **Report and Mark rectified.** Tap a card to choose it; **Report** downloads the chosen inspection's full report; **Mark rectified** moves the chosen defects into History with an optional note. Nothing is deleted.
- **A work order as a PDF bundle. Work order** prepares, in your own OneDrive, an A4 work order of the open defects, numbered with a Fixed box and a Fitter's notes column, with the inspection report behind each item beside it; then **Download** saves the PDF and **Bundle** opens the folder, whose own Download gives the zip. Each listed defect takes the order's reference. The app asks once to allow a OneDrive for Business connection.
- **What's new, once.** The first time you open a new release, a notice covers the Dashboard with the release's features, each title a link to its help page: **Ok** closes it, **Take me there** walks a short tour of the feature with Next, Back and Skip. It shows once per person per release.

23/10/2026: statutory appointments from the field

New:

- **Statutory appointments sent from FastField.** The **Mine Record Book Entry** form offers *Statutory appointment and written acceptance*: the position, the appointee chosen from your profile's current staff or typed with their job title and your attestation that they are a senior employee, and the signed letter photographed into the form. The entry arrives with the appointee, and the project's **Statutory appointments** update exactly as for an appointment made in the app. A pick who is not current senior staff of your profile is refused. Corrections stay in the app. No app release. See Mine Record Book appointments.
- **Personal details required.** A field entry without its **Personal details** choice is no longer recorded as *None*; it is refused with that reason.

22/10/2026: Mine Record Book entries from the field

New:

- **Entries sent from FastField.** The **Mine Record Book Entry** form in FastField records any of the six kinds made in the field on a project the crew's login can see. Each submission becomes one entry in the Mine Record Book, with the form as a PDF in its **Files**, and a submission sent twice makes one entry. Appointments and corrections stay in the app. See Mine Record Book.

1.0.0.14 (20/10/2026): the phone view finished

New:

- **Cards on the Registers and Databases lists on a phone.** Each form or record shows as a card with its first few details; tap a card to choose it, and **Preview**, **Download**, **Edit** or **Delete** act on it. The count line sits above the cards. On a tablet and a computer the lists keep their columns, and now fill the window at every width.
- **A refused delete opens the records that stop it.** When a delete is refused because records point at the row, the box's second button, **Open the entries** (**Entries** on a phone), opens the screen that holds them with the row already chosen as the filter: a person's, an asset's or a device's compliance records, a project's people, or a client's projects. See Databases.

Improved:

- **Settings is a page of fields.** The FastField logins sit at the top, then the summary, report and form settings, in one column on a phone, two on a tablet held upright and three otherwise; the page scrolls as one. **Save** opens once a field differs from the saved settings, and after a save the page reloads with what it saved. See Settings.
- **The Dashboard's dates** sit in a row of their own under the figures, **From** and **To** each with its reset, on two lines on a phone; the figures sit each with its caption. See Dashboard.
- **The Dashboard on a tablet.** Under 1,200 pixels wide the chart sits above its summary list, the list shows up to eight rows, and on a tablet held sideways the right-hand column scrolls.
- **The MSMS preview** takes the lower half of the screen on a phone or tablet with the list above it, and closes when you tap the list, change folder or change library. See MSMS.

Fixed:

- **Save on an equipment record** opens after one change of **Type**; it stayed greyed until the type changed twice.
- **The MSMS preview says what it is doing** while a PDF loads, why it could not load, or that nothing came back, instead of showing an empty grey box; the download icon still opens the file. A preview that shows and then greys out is the viewer's own failure on some files: see Known behaviours.

1.0.0.13 (19/10/2026): the phone screens, copyable FastField logins

New:

- **Screens for a phone and a tablet.** The app lays itself out for the width it has, instead of shrinking the desktop layout to fit. On a phone the menu sits behind the menu button and opens over the screen; the Dashboard stacks its lists, figures and chart, with the tab row and the figures scrolling sideways; the Compliance list and the Mine Record Book's entries show as cards (tap a Compliance card to choose it for **Edit** or **Delete**); forms show one column; the Registers and Databases lists keep their columns and scroll within themselves. On a tablet held upright, side-by-side panels stack. On a computer the screens are as they were, filling the window at the type's true size. **Beta testers on a phone or tablet:** in the Power Apps mobile app, choose the Xplore Shield version marked **Test**.
- **FastField logins and passwords, copyable.** On Settings, each of the profile's FastField logins is a row with its login, its password and a copy button beside each: one tap copies it, and the app says "Login copied" or "Password copied". See Settings.
- **The safety profile selector under Settings in the menu.** The few Terra Search staff who can switch profile now find it as a row under **Settings** in the menu on every main screen, in place of the Dashboard's button; the screen they are on reloads for the new profile. See Dashboard.

Improved:

- **The Mine Record Book's rows** have larger type on a computer, and the correction link has room for a long note.
- **The Databases tabs** keep their own order, Staff first.
- **The Compliance follow-ups note and the Registers count line** sit above the list on a phone and on a tablet held upright.
- **Dialogs and buttons fit a phone**: the Sync and Upload dialogs, the Feedback buttons and the Staff Compliance notice.

1.0.0.12 (15/10/2026): MSMS previews

Fixed:

- **PDF previews in Client MSMS.** Choosing a PDF in your organisation's MSMS folder shows it on the right, instead of saying the preview could not run. See MSMS.

1.0.0.11 (15/10/2026): saves that say when FastField gets them

New:

- **A note after each save in the Databases.** Saving a person, a piece of equipment, a device, a client or a project shows "Saved. FastField gets this change at the 1:00 am upload, or straight away through Fastfield → Sync", without stopping you. The **Fastfield** button on that tab turns blue with a dot until you choose **Sync** or move to another tab. With no syncs left today, the note gives the 1:00 am upload alone. See Databases.
- **MSMS uploads and new folders work in the beta**, in your organisation's folder of the MSMS library; PDF previews from 1.0.0.12. See MSMS.

Improved:

- **Export downloads in one step.** The Registers export saves its CSV straight away; a new browser tab may flash open and close as it starts. See Registers.

Fixed:

- An unused list connection left behind by the retired Safety Briefing screen is removed.

1.0.0.10 (14/10/2026): filters that say they are on

New:

- **The version** shows small at the foot of the menu while it is open, like "Version 1.0.0.10". See FAQ.
- **Xplore Shield and your safety profile** in the middle of the blue bar, on every main screen. See Dashboard.
- **Filters that say they are on.** On Registers, Compliance and Databases the **Filters** button turns blue with a dot while a filter is in use. A filter you choose still carries to the next screen or tab, as before.
- **An empty list says why.** When the filters leave a list empty it says "Nothing matches the filters in use", with a **Reset filters** button that clears them all. See Registers, Compliance, Databases and Mine Record Book.
- **Open actions by kind.** The Mine Record Book's kind filter shows how many open actions each kind holds, like "(2 open)".

Improved:

- **Download saves the file in one step** in the Mine Record Book and in the Dashboard's preview, as it already did on

Registers.
- **Export carries your Search text** as well as your filters and dates.
- The preview's zoom hint is plain white text you can read.

Fixed:
- A picker that depends on another, such as equipment under its type or a project under its client, no longer shows an old choice in the record's heading, its rental details or its Edit buttons after the first picker changes.
- An incident report's date and a device's last tracking time are kept exactly as saved when you open the record and change nothing.
- Export file names and new MSMS folder names turn characters a name cannot hold, such as / or :, into hyphens.
- **Sync** in Databases cannot be started twice at once.
- The MSMS lists no longer show the word "Button" on each row.
- The unused Safety Briefing screen, which could not be reached, is removed.

1.0.0.9 (14/10/2026): the beta release

New:
- **Feedback** in the blue bar: send a bug, suggestion or question from the screen you are on, with a screenshot if you like. You can read only your own reports. See Feedback.
- **Help** in the blue bar opens this help at the page for the screen you are on.
- **Dates in the Mine Record Book** show as day, month and year, like 14-Oct-26, and its entries and files load for the chosen project only.
- **Database deletes refused if that item is being tracked in a compliance list.** A person, piece of equipment, comms device, client or project that compliance records or Mine Record Book entries still name cannot be deleted; the app says what is attached and what to do instead. See Databases.
- **Staff without a mobile number.** Under a safety profile marked "Mobile numbers not held" a person can be saved with no mobile, shown as "Not held". The setting is on Settings.
- **Registers and Compliance each show one list.** On Registers, choose a register and its forms show in one list, newest first, with that register's own columns. The large registers show the last 30 days straight away; set an earlier From Date and choose **Search the whole list** to find older forms. Compliance shows its Staff, Equipment, Comms and Follow-up tabs the same way. See Registers and Compliance.
- **Form PDFs saved straight to your device** from Download on the Registers' All Forms.
- **Names as on an identity document.** First name, other names and surname on the staff form, with the full name worked out for you.

Improved:
- Screens refresh themselves every 15 seconds, so the old refresh buttons are gone and a save shows at once.
- Australian 13, 1300 and 1800 numbers are accepted for a project's accommodation, medical, hospital, police and airfield contacts.
- Principal Geologist, Managing Director and Operations Manager count as senior job titles for statutory appointments.
- The Dashboard's profile list is compact (for the few staff who can switch profile).
- Equipment and comms types follow the lists' own choices; Quad Bike is offered only for equipment that already has it.
- Text boxes check what you type as you type it, and a form you have not changed no longer asks whether to save.

Fixed:
- The Dashboard draws its Attention Required list on the first load, and its reload no longer empties or doubles the lists.
- A picker that depends on another, such as a project under a client, no longer keeps a choice from the old list.
- Changing the client filter clears the old project, so lists no longer go empty.
- Light vehicles are listed on the Dashboard when a service is due by distance, as vehicles were before.
- Buttons that were cut off now show whole, and long MSMS file names wrap.
- The project form shows its client correctly, and the equipment type picker works when adding equipment.

1.0.0.8 (08/10/2026)
- The Dashboard's Attention Required number is right on the first load, and also counts open hazards and incidents.

1.0.0.7 (08/10/2026)
- Settings is the last item in the menu.
- The Mine Record Book lists entry kinds and statutory positions in a working order, with "Site senior executive (SSE)".
- An appointee who is not in the staff list can be typed in, with their job title and a confirmation that they are a senior employee.
- The Close action button shows whole.

1.0.0.6 (07/10/2026): the first refactor

- One look and one set of rules across the app: dates and times shown the same way everywhere, like 14-Oct-26; a checked coordinates box; "Discard" and "Save" when you leave a changed form. Email and phone boxes are checked from 1.0.0.9.
- The Dashboard loads once and refreshes every 15 seconds; its counts match the lists under them.
- Registers export written to your own OneDrive.
- Downloads open from the file's own link. MSMS still works this way; from 1.0.0.9 and 1.0.0.10, Download on Registers, the Mine Record Book and the Dashboard's preview saves the file in one step instead.
- Fixes to pickers that kept old choices, coordinates that could be wiped and names with an apostrophe in exports.
- FastField passwords are no longer shown on Settings.
- Equipment whose fire extinguisher tag has lapsed is listed on the Dashboard even when it has no service reading.

1.0.0.5 (05/10/2026)

- A short hint under Personal details on a Mine Record Book entry.

1.0.0.4 (05/10/2026)

- Statutory appointments in the Mine Record Book: one of 17 positions and a senior employee, written to the project's record and shown on the project.
- The Mine Record Book picks its sites from the projects list and shows each entry's number, date and author, with links between corrections and the entries they replace.

1.0.0.3 (02/10/2026)

- Attachments on Mine Record Book entries: attach, preview and download files. Files cannot be replaced or removed.

1.0.0.2 (02/10/2026)

- Registers export and downloads work.

1.0.0.1 (01/10/2026)

- The first build: the Xplore Shield app with a new Mine Record Book screen, where entries are added, corrected and closed, never edited.

Next

The next release will be added here when it reaches the test environment.

Related pages

- Why an exploration MSMS matters
- Quick start
- Known behaviours in the beta

5. Microsoft 365 licence needed for Xplore Shield

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

Xplore Shield is a Power Apps app. To open it you need a Microsoft 365 licence that includes Power Apps rights. Check this before your first sign-in.

Who needs to check

- **Terra Search staff** who sign in with their Terra Search account: the Microsoft 365 licence you already hold covers the app. Nothing to do.
- **Guests**, who sign in with their own organisation's account: the licence has to come from somewhere, and it is not always the one Terra Search's invitation gave you. Read on.

What counts

The app needs "Power Apps for Office 365" rights. Most Microsoft 365 business and enterprise plans include them. The licence can come from either of two places:

1. **Your own organisation's Microsoft 365 licence**, if it includes Power Apps for Office 365. This costs Terra Search nothing, and it is the first thing to check.
2. **A seat from Terra Search's Microsoft 365 account**, when your own organisation's licence does not include those rights. Terra Search decides this with you; do not buy a licence before you ask.

What does not count

The invitation to the Terra Search tenant gives a guest two free plans, "Power Apps Developer" and "Power Automate Free". They are meant for building and trying things in a developer environment. The Xplore Shield beta runs in a test environment that is not a developer environment, so **those two plans on their own do not let you open the app**.

How to check yours

Ask whoever looks after Microsoft 365 for your organisation (your IT administrator or provider):

> Does my Microsoft 365 licence include Power Apps for Office 365 rights?

If the answer is yes, you are ready: go to Quick start. If the answer is no or unsure, tell Terra Search and we will sort out the licence with you.

If the app will not open

If the app refuses to open and the message mentions a licence or a plan, that is this page's problem and not a fault in your sign-in. Send Terra Search a screenshot of the message (never your password) and we will follow it up. Anything else that stops you opening the app, such as a blank screen, is worth a report too: see Feedback and what happens to a report.

Related pages

- Quick start
- Frequently asked questions
- Xplore Shield help

6. Xplore Shield frequently asked questions

Updated: 22/10/2026 16:30 AWST
App version 1.0.0.21

If your question is not here, ask it through **Feedback** in the blue bar at the top of a main screen. See Feedback and what happens to your report.

About Xplore Shield

What is Xplore Shield?

An app for exploration businesses that runs the field side of a mine safety management system (MSMS): who and what is in the field, the forms crews submit, reminders before things lapse, hazards and incidents followed through, and a mine record that cannot be quietly changed. See Why an exploration MSMS matters.

Does an exploration company need a mine safety management system?

In Western Australia, the duty to establish and implement an MSMS under the Work Health and Safety (Mines) Regulations 2022 applies to exploration operations as well as to mines. Xplore Shield helps you run and evidence it; it does not make an operation compliant on its own.

What is new in this release?

See the Release summary and change log. The beta release is 1.0.0.14, of 20/10/2026.

Which version of Xplore Shield am I using?

Open the menu: the version shows small at its foot, like "Version 1.0.0.14". A report you send through **Feedback** records it for you.

Does it work on a phone?

Yes, from release 1.0.0.13. In the Power Apps mobile app, sign in and choose the Xplore Shield version marked **Test**: that is the beta, and its screens lay themselves out for a phone or a tablet. See Known behaviours for what differs on a phone.

Getting started

The app will not open for me. Why?

The commonest reason is the licence. Your Microsoft 365 licence needs Power Apps for Office 365 rights. See Microsoft 365 licence.

Do I choose my safety profile?

No. The app puts you on your organisation's profile when you open it. Only a few Terra Search staff can switch profile, from the row under **Settings** in the menu. If the Dashboard shows someone else's data, or none, send a report.

Is what I enter in the beta real?

Yes. Entries you make, in the Mine Record Book above all, are real records. Do not enter practice data you would not want kept.

Mine Record Book

I made a mistake in an entry. How do I fix it?

Choose **Correct** on the entry, change what is wrong and save. The old entry stays, struck through, and links to the new one. Entries and files cannot be edited or deleted, because the book is a statutory record. See Mine Record Book.

A colleague says they added an entry, but I cannot see it.

The Mine Record Book reads the entries when you open the screen. Leave it and come back.

How do I record a statutory appointment?

See Mine Record Book appointments.

Compliance and reminders

Why does my "Missing Forms" list include items I cannot submit?

Some entries in the list, such as an RDO (rostered day off) date or a JMP (journey management plan) departure, are not

forms a person can hand in at the time, so they can show as missing when nobody can clear them. Terra Search knows about this and is looking at it. If you see an item you cannot act on, do not chase it: tell us which one through **Feedback**.

A prestart was submitted late, or after midnight, and still shows as missed.

A form that reaches the system on a later day than the one it is for does not clear the earlier miss. Devices in remote areas can sync hours late. Tell your administrator, who can clear the miss by hand.

I raised a hazard on the daily prestart form. Is it in the Hazard Reports register?

Yes. Hazards raised in the hazard sections of the daily prestart meeting and of the weekly toolbox meeting are written to the Hazard Reports register. This has been so since 25 September 2026, and hazards lost before then were put back. If one you raised is missing, send a report with the project, the date and the form, through **Feedback**.

Someone, or something, appears twice.

A person with two staff records, or equipment recorded under two projects, can appear twice. Send a report with the name so an administrator can tidy the records. Do not delete either yourself unless you are sure which is the old one.

Doesn't the compliance list fill from the database? I had already added our people and equipment there.

No. Adding a record to the Staff or Equipment database sends nothing and puts nobody on a compliance list. A person or item joins a project's list when a submitted form that adds people or equipment names them. The database decides only who can be added. See Staff compliance and Equipment compliance.

Is someone at Terra Search adding people to our compliance list?

Normally nobody does it by hand. The crew's own forms add them, as above. Anyone with access can also add a record with **New** on the Compliance screen, which sends the same "added" email (see Notifications, below). Which forms add people is set on each project's record, under Staff Trigger Forms. See Projects database.

Do changes we make in our Databases change Terra Search's records?

No. Each record belongs to one safety profile, and the app shows and changes only your profile's records. Terra Search keeps its own copy of each person it employs or supplies, under its own profile, for its HR forms. Editing your copy does not change Terra Search's. See Staff database record.

I changed our staff list but FastField doesn't show it.

Saving in the Databases does not send the change to FastField. It goes across at 1:00 am Western Australia time, or straight away if you choose **Fastfield**, then **Sync**, on the tab you changed; the app says so in a note after each save. Then sync FastField on the phone, which keeps the list it last downloaded until it syncs. See Databases.

Contractors are listed with employees. Can they be separate?

Not yet. Contractors are listed with employees today. Marking a person as **Contractor** on their staff record changes what notifications they can have, but does not move them into a list of their own. Separate lists are a suggestion Terra Search has noted.

Notifications

Why do I get so many notifications?

Xplore Shield's emails and texts are not sent by the app on your phone or computer. Terra Search's automated system sends them, from the records the app and your field forms keep. Several separate jobs each decide for themselves whom to tell, and most of them run every day, some every hour. So one missing form can reach the person who owes it, the project's own contacts and the profile's report lists, each by its own message, and someone named on several lists gets each list's messages.

Terra Search has looked at what its reminders do. Many are worth having, but some are not: a reminder that repeats one already sent that day, one about a form already handed in, one sent to someone who is away, and one about work run under a client's own safety system. Terra Search is working to cut these down; the first step is under *What is changing?* below. Until then, the settings below are what decide who gets what.

What does the system send, and who gets it?

Message	Who gets it	When	What decides it
Compliance reminder: "Compliance Report (client - project)", by email	The person on the project's compliance list	Once a day at the project's **Compliance Hour**, while any of their forms is missing	Their **Notifications** switch on their compliance record

Weather report, by email	People on the project's compliance list	5 am in the project's time zone, each day	Their **Weather** switch on their compliance record, which a new record takes from the project's **Weather Notifications**; their **Notifications** switch; the project needs its work site coordinates
Missed check-in reminders, by text and email	The person whose check-in is due	At the project's **Check-In Hour**, then one and two hours later, while it is still due	The project's **Check-In** requirement and **Check-In Hour**. The **Notifications** switch does not stop these
"Check-Ins Due" lists, by text and email	The project's **Check-Ins** recipients, and the **Check-In Reports** people on Settings	One and two hours after the project's check-in hour, while anyone is missing	Those two lists
Check-in confirmations, by email	The person who checked in	Each check-in. A second one the same day brings a "Duplicated Check-In" email	Sent for every check-in
"Check-In Completed", by text and email	The project's **Check-Ins** recipients; the **Check-In Reports** people get "Check-ins Completed" for the whole profile	When the last check-in due arrives	Those two lists
"... was added to the Staff (or Equipment) Compliance list", by email	Everyone on **Compliance Reports** on Settings	Each time a person or a piece of equipment is added to a project's compliance list	The **Compliance Reports** list
The daily Compliance Report, by email	Everyone on **Compliance Reports**	Once a day at the **Compliance Hour Check** on Settings, while any person or equipment has missing forms	The **Compliance Reports** list and **Compliance Hour Check**
Return summaries and equipment notices, by email	Everyone on **Compliance Reports**	When a person or a piece of equipment comes off the list with forms missed; when an inspection names a different project, or is parked; and each day a project has equipment with missing inspections but nobody on its list who receives reminders	The **Compliance Reports** list
Return inspection reminders, by text and email	The person who submitted a return form, or the crew named on an End Shift	While a return inspection is still due on the equipment	The equipment's return inspections
Submitted forms, by email with the PDF	The distribution lists on Settings for that kind of form, and the project's own recipients	Each form that is always sent, or every form when **Send All Forms?** is on	The distribution lists and **Send All Forms?** (below)
GPS tracker alerts, by email	Everyone on **Comms Reports**	Hourly, 7 am to 4 pm in the project's time, while a tracker is off, low on battery or not tracking	The **Comms Reports** list and the device's **Tracking** switch

Tracker alerts to the crew, by text and email	The crew the device travels with	When a **Comms Reports** recipient chooses **Notify Crew**, or nobody answers the alert within 20 minutes	The same
The HR report, by email	Everyone on **HR Reports**	Mondays at 7 am, Western Australia time, when licences have expired or are about to	The **HR Reports** list
RDO registered, by email	The person	When their RDO is recorded	Sent for every RDO recorded
Safety Briefing, by text	Each person named on a Safety Briefing	When the briefing is submitted	Sent for every briefing

A person on two projects' lists gets each project's reminders, and someone who is both a project's **Check-Ins** recipient and on **Check-In Reports** gets both sets of check-in messages.

Why do I keep getting emails saying a person or equipment was "added to the compliance list"?

One email goes to everyone listed under **Compliance Reports** on Settings each time a person or a piece of equipment is added to a project's compliance list. It is sent whatever made the addition, and a person is added again at the start of each new swing, so a rotating crew produces many. Each one confirms that the crew's own forms put them on the list. Terra Search is testing a way to gather each day's additions into one email (see *What is changing?* below). See Staff compliance.

What can I change myself?

A change on **Settings** applies to your whole safety profile. See Settings.

- **Compliance Reports**: who receives the "added" emails, the daily Compliance Report, the return summaries and the equipment notices. Taking someone off this list stops all of these for them.
- **Check-In Reports**, **Comms Reports** and **HR Reports**: who receives each of those reports. A project's own **Check-Ins** recipients are on its record in the Projects database.
- A list on Settings cannot be left empty: a picker you clear keeps its saved people. If **Compliance Reports** has nobody on it, the profile's app users are emailed instead, each time one of its messages is due, and asked to fill it. To empty a list, ask Terra Search through **Feedback**.
- **Send All Forms?** and the distribution lists: with the switch off, only incident reports, hazard reports, job safety analyses (JSEAs), weekly toolbox meetings, daily reports and any form marked "Attention Required" are emailed. With it on, every form is. A project's own **Send All Forms?** switched on sends every form from that project, to Settings' lists and to the project's own recipients; switched off, it does not stop the profile's switch.
- **A person's Notifications switch**, on their compliance record. Turning it off stops their daily compliance reminder and their weather report, but not their check-in reminders. The app asks for the reason, because the reminders are a safety measure, and keeps it as a compliance record. If nobody on a project receives reminders, the **Compliance Reports** people are told each day about that project's missing equipment inspections instead. See Staff compliance.
- **Weather**, on the same record: turns the 5 am weather report off for that person.
- **Contractor**, on the staff record: only a contractor's **Compliance Notifications** can be turned off there. With it off, the person's forms do not put them on a compliance list, and a daily prestart never adds a contractor, so they get no reminders unless someone adds them to a list by hand. See Staff database record.
- **Tracking**, on a comms device's compliance record: turns its tracker alerts off. **Disable Tracking** in the alert email does the same. See Comms compliance.
- **Coming off the list.** A person who has gone home but still gets reminders may never have submitted an End Shift form. See Staff compliance for how people leave the list.

What should I tell Terra Search?

Send a report through **Feedback** in the blue bar at the top of a main screen when a message:

- repeats one you already had that day;
- is about a form already handed in;
- reached someone who was away, on an RDO or had gone home;
- is about work where the client runs its own safety system;
- went to the wrong person, or arrived at the wrong time of day;
- is one you cannot act on, or cannot turn off yourself.

Say what the message said, when it came, and which person, equipment or project it was about. Reports like these are

what the beta is meant to find. See Feedback and what happens to your report.

What is changing?

Terra Search is testing a new way to send these. Each day's additions to the compliance lists would come as one daily email, and the app would gain a notification bell with a list of your notices. It is being tested now, and no date is set. Until it replaces them, the messages above carry on as described. The Notifications page describes the bell, the For you view and the daily digest as they will work.

Records and settings

Why does a staff record show "Not held" for the mobile number?

For a safety profile marked "Mobile numbers not held" on the Settings screen, the mobile number is not required. The box shows **Not held** with a short note, and you can save without a number. For every other profile a mobile number is required and checked. See Staff database record.

Some crews work under their own employer's safety system, and that employer may prefer not to record their mobile numbers with us. You no longer need to enter a placeholder or made-up number for them.

- **New option available:** anyone who can open **Settings** for the profile can now turn on the **Mobile numbers not held** setting.
- **Updating staff:** once it is on, you can leave a staff member's mobile number as **Not held**, or enter a real number if one is provided.
- **Existing placeholders:** please don't update or clear the placeholder numbers already in the system. Our automated text messaging is still being updated to handle blank numbers safely, and removing placeholders now may cause messaging errors. We will let you know as soon as it is safe to clean them up.

Where do I put a person's nickname?

In **Other Names** on their staff record. The first name and surname must be as on their identity document, because the system stores and finds a person by first name and surname only. A nickname typed into the first name or surname would show everywhere and stop matching Terra Search's own copy.

Why will the app not let me delete a person, project or piece of equipment?

A row that compliance records, or Mine Record Book entries, still point at cannot be deleted, so that the history is not orphaned. The box says what is attached and what to do instead: close or move those records, or mark the row inactive. See Databases.

Why is the Quad Bike type not offered for new equipment?

Quad bikes are being retired in favour of side-by-side vehicles. An existing item that is a quad bike keeps its type, but new equipment cannot be added as one.

Reports arrive at the wrong time of day.

Report times come from **Compliance Hour Check** and the time zone field (the one labelled with the three-letter abbreviation of Greenwich Mean Time) on the Settings screen. Check that the time zone matches your location. A change there applies to the whole safety profile. See Settings.

A date looks one day out.

A date with no time, such as an expiry date, shows the date as it was entered, wherever you are. A date with a time shows in your own time zone.

Documents

How do I get the PDF of a Daily Report, or any other form?

Only the **All Forms** register holds the form PDFs. Open Registers, choose All Forms, filter by the form name, tick one row and choose **Preview** or **Download**; Download saves the PDF straight to your device. See Registers.

How do I find a form older than 30 days?

On Registers, open **Filters**, set a From date before the last 30 days and choose **Search the whole list**. See Registers.

I cannot upload to my client's MSMS folder.

Tell Terra Search which folder and which account. Folder access is set up by administrators and can need fixing for a new client. See MSMS.

More help

- Known behaviours in the beta

- Quick start
- Xplore Shield help

7. Known behaviours in the Xplore Shield beta

Updated: 28/10/2026 15:50 AWST
App version 1.0.0.21

These are things in release 1.0.0.13 that you may meet and that look like faults. Terra Search knows about them, so you need not report them. Where a change is planned it comes in a later release: see the Release summary and change log. If what you see is different, or worse, please send a report: see Feedback and what happens to your report.

Lists that refresh themselves

- **Lists refresh every 15 seconds, but not while you have rows ticked.** On Compliance, Registers and Databases, untick your rows to see new records.
- **The Dashboard refreshes only the tab you are on.** Switch tab and wait a moment for that tab to catch up.
- **A big organisation takes a while to load**, and the loading wheel has no words. Give it a minute before you report it.

On a phone, a tablet or a wide monitor

- **"Refresh" is always the right answer.** Work on the beta continues in the background, so the app may say a new version is coming, then that you are using an old version. When you see **Refresh**, save what you are entering, then choose it.
- **Choose the version marked Test.** In the Power Apps mobile app the beta is the Xplore Shield marked **Test**; the other is the app you use today.
- **The Registers and Databases lists show as cards on a phone**; tap a card to choose it. On a tablet and a computer the lists keep their columns.
- **The MSMS preview takes the lower half of the screen on a phone or tablet**, the list above it; tap the list to close it.
- **Toolbars fold buttons under "..." on a phone** when there is no room: Export, Fastfield and the rest are under the dots.
- **On a very wide monitor the app fills the window** at the type's true size. Use your browser's zoom to make it larger.

Registers

- **The large registers show the last 30 days.** To see older forms, set an earlier From date in Filters and choose **Search the whole list**. See Registers.
- **Search narrows only the rows already shown.** It does not reach older forms until you have searched the whole list by date.
- **Export works on four registers**: All Forms, Hazard Reports, Incident Reports and Daily Prestart Meeting. It is greyed on the others, and Take 5s offers no Edit or Delete.
- **JSEAs show no sender.** The form does not record one yet.

Mine Record Book

- **Someone else's new entry appears when you open the screen again.** Your own saves appear straight away.
- **The open-actions badge counts the whole project**, whatever kind of entry you filter by.
- **You cannot edit or delete an entry.** That is by design, because the book is a statutory record. Use **Correct** or **Close action**. The old entry stays, struck through, and links to its replacement.
- **Files cannot be replaced or removed once saved.** To fix a wrong file, make a correction and attach the right one.
- **There is no "all projects" view.** Choose one project at a time.

Compliance and reminders

- **One email for every addition to a compliance list.** A person or item added again at the start of a new swing sends another. Terra Search plans to gather them into one daily email.
- **A hired item whose rental details are typed two ways is tracked twice**, with its own email and reminders. Type the details the same way every time.
- **Delete on the Follow-up tab removes the follow-up itself**, not just its row on screen.

Records

- **Saving in the Databases sends nothing to FastField by itself.** The 1:00 am upload, or **Fastfield** then **Sync** on the tab you changed, does that, and the phone must then sync FastField. The app now says so in a note after each save. See Databases.

- **A delete can be refused.** If a person, piece of equipment, device, client or project is still being tracked in a compliance list, or named in Mine Record Book entries, the app says what is attached and what to do instead. See Databases.
- **"Not held" in a mobile number.** Under a safety profile marked "Mobile numbers not held" on Settings, the Staff form shows **Not held** and you can save without a number. Everyone else's mobile is still required and checked.
- **Project phone numbers accept 1800 numbers** although the hint shows only 13 and 1300 examples. International numbers are accepted for people, not for a project's contacts.

MSMS

- **A PDF preview can stay grey on the first tap, or show and then grey out.** The viewer is Microsoft's own and fails on some files; choose the file again, or open it with the download icon. While a PDF loads the preview says so, and it says when nothing came back.

Help and Feedback

- **Help and Feedback are in the blue bar of the main screens only.** The record screens, such as a staff record, have no blue bar, so go back first. Help opens the page for the screen you are on.

Dates and times

- **Dates show as day, month and year**, like 14-Oct-26. A date with no time, such as an expiry date, shows the date as it was entered, wherever you are. Times with a date show in your own time zone.

Settings

- **A change on Settings applies to the whole safety profile**, to everyone on it, and only once you choose **Save**. After a save the page reloads with what it saved; a picker left blank keeps its saved value.

Related pages

- Frequently asked questions
- Release summary and change log
- Xplore Shield help

8. Feedback and what happens to your report

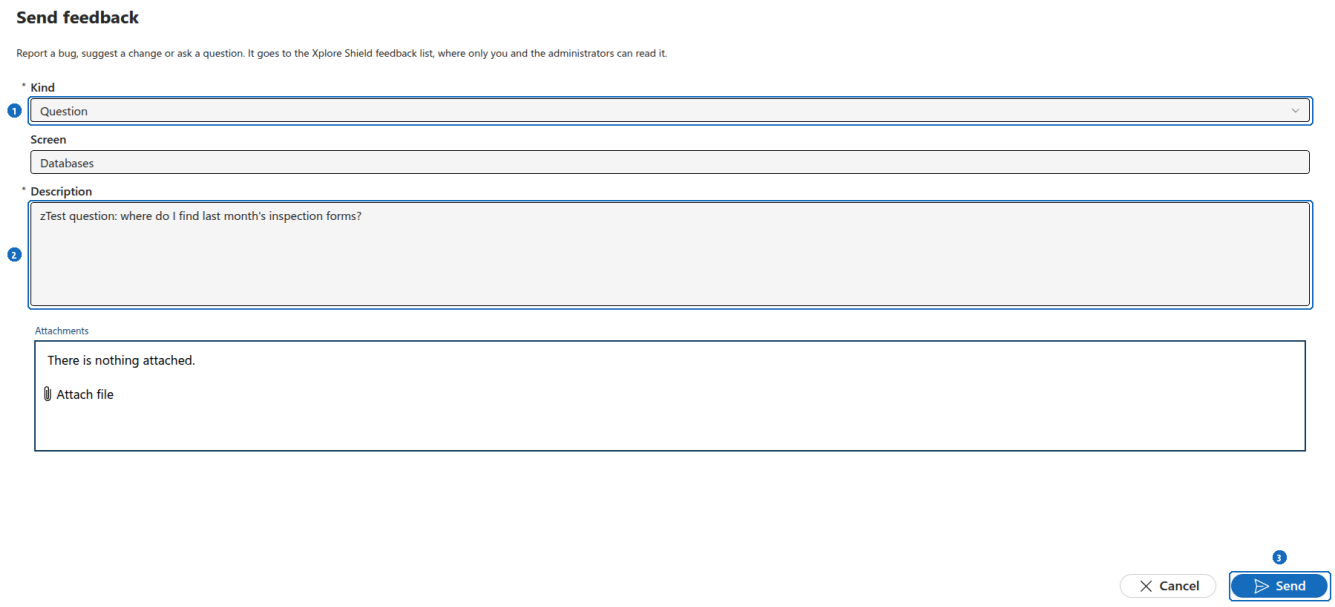
Updated: 15/10/2026 09:34 AWST
App version 1.0.0.21

You are one of the first people to use this version of Xplore Shield, so your reports are the point of the beta. Please send them as you go, however small.

How to send a report

1. On any main screen (Dashboard, Compliance, Registers, Databases, Mine Record Book, MSMS or Settings), choose **Feedback** in the blue bar at the top. The record screens, such as a staff record, have no blue bar, so go back to the main screen first.
2. The **Send feedback** screen opens. Choose the **Kind**:
   - **Bug**: something does not work, or shows the wrong thing.
   - **Suggestion**: something would work better another way.
   - **Question**: you are not sure how to do something.
3. **Screen** is filled in with the screen you came from. Change it if the report is about a different screen.
4. Write what happened in **Description**, and what you expected. Say what you pressed or typed, in order, if you can. Do not type a password.
5. Add a screenshot under **Attachments** if it helps. Cover or crop out anything that is not part of the problem.
6. Choose **Send**. **Send** stays greyed until you have chosen a kind and written a description. The app says "Thank you: your feedback was sent." **Cancel** goes back without sending.

The report is saved with your name, the time, the version of the app and the safety profile you were working in, so you do not need to type those. If it cannot be sent, the app says "Sending failed" with the reason: try again, and if it keeps failing, contact Terra Search directly.



Who can read it

Reports go to the **Xplore Shield Feedback** list. **You can read only your own reports.** Terra Search's administrators can read all of them.

What happens next

1. **Terra Search reads every report.** Reports do not raise an alert, so they are read in batches, not the moment you send one. If something stops you doing your work, contact Terra Search directly as well, using the details in your welcome email.
2. **Reports are analysed together.** Terra Search reviews everything sent in: grouping reports about the same thing, checking each against what is already known, and trying to reproduce each bug. The first review comes after the beta's first week, and more follow.
3. **Each report ends in one of four ways:**

- answered, when it was a question;
- already known, because it matches something on the list of known behaviours or already being fixed;
- turned into a change to make, which is put in the queue for a later version; or
- set aside, with a reason, when it is not something the app will do.

4. **Not every report gets a personal reply.** If you asked a question you are likely to hear back; for the rest, you will see the effect in a later version.

Help sits beside Feedback

Next to **Feedback** in the blue bar is **Help**. On a main screen it opens the page of this help for that screen. On the Feedback screen, and on record screens, there is no Help button: use the help home or the search box on this site.

Related pages

- Frequently asked questions
- Known behaviours in the beta
- Xplore Shield help

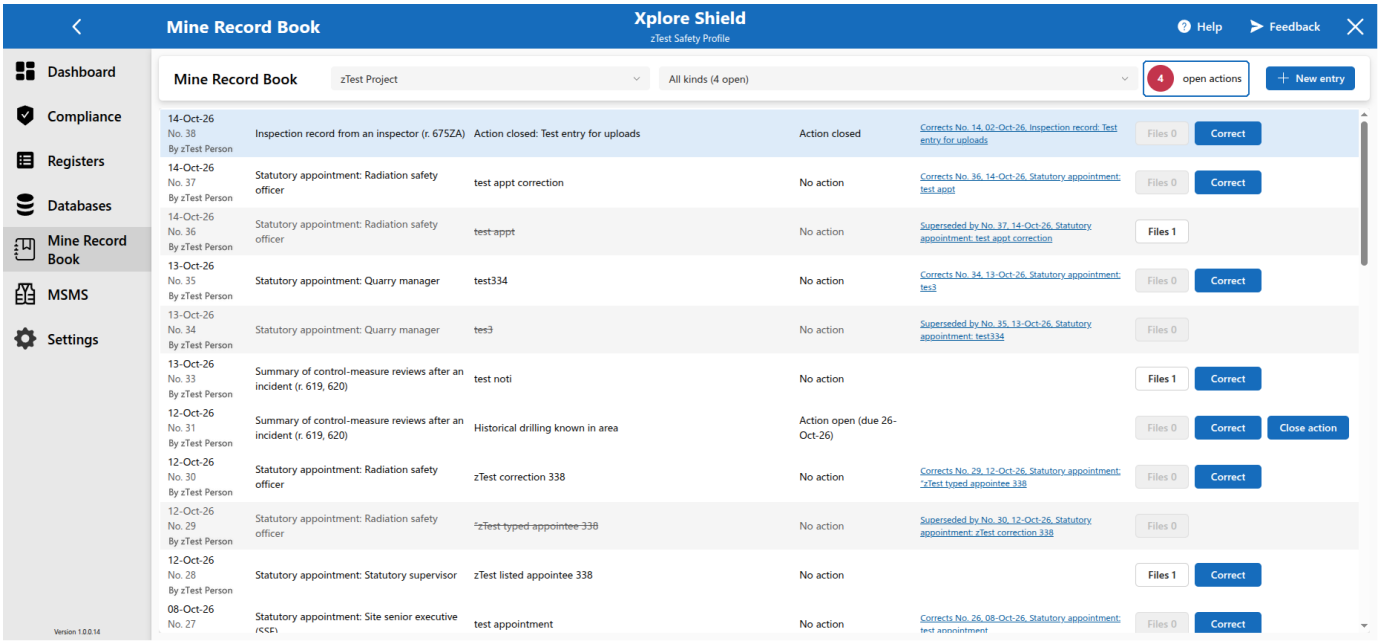
9. Mine Record Book screen

Updated: 23/10/2026 09:49 AWST

App version 1.0.0.21

The Mine Record Book is a statutory register kept for each project: inspection records, notices, correspondence, incidents notified to the regulator, control-measure reviews and statutory appointments. Open it from **Mine Record Book** in the menu.

Entries cannot be edited or deleted. A mistake is fixed by adding a correction, and an action is closed by adding a closing entry. The old entry stays in the list, struck through, with a link to its replacement.



Find entries

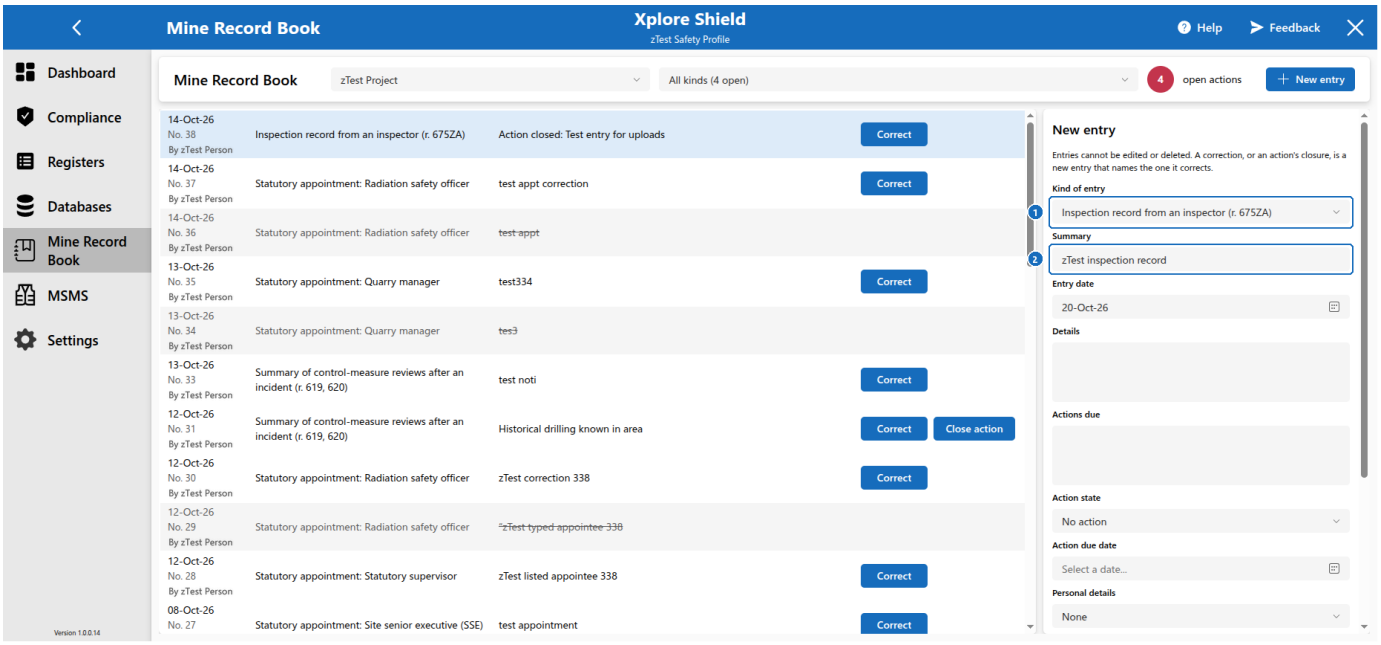
1. Choose the project in the **Project** list at the top. The list shows your organisation's projects, A to Z. There is no "all projects" view.
2. To narrow the list, choose a kind in **Kind of entry**, such as "Notice under Part 10 of the Act". "All kinds" shows everything. Each kind with open actions shows how many, like "(2 open)", and "All kinds" shows the project's total. If no entry is of the chosen kind, the list says "Nothing matches the filters in use"; **Reset filters** shows every kind again.
3. The round badge beside "open actions" counts the project's entries whose action is still open. It does not change with the kind filter.

Each row shows the entry's date, its number, who made it, its kind, its summary and its action state ("No action", "Action open (due ...)" or "Action closed"). A row that corrects another, or has been replaced, has a blue link to the other entry: choose it to jump there.

Add an entry

1. Choose **New entry**. A panel opens on the right.
2. Choose the **Kind of entry**. For a statutory appointment, see Mine Record Book appointments.
3. Type a **Summary**. The Summary and the Kind are all you must fill in.
4. Fill in what you have: **Entry date** (today unless you change it), **Details**, **Actions due**, **Action state**, **Action due date**.
5. Choose **Personal details**: "None", "With consent" or "De-identified", to say whether the entry or its files hold anyone's personal details.
6. To add files, choose **Attach files**. You can attach up to 10 files, a PDF or an image of up to 10 MB each. Once saved they cannot be replaced or removed.
7. Choose **Save entry**. The app says "Entry added to the Mine Record Book". If **Save entry** is greyed out, the Summary, the Kind or, for an appointment, the position or appointee is missing.

If two files share a name the app asks you to rename one. If the entry saves but some files do not upload, it names them: add them with a correction.



Entries sent from the field

Field crews can record an entry where they work with the **Mine Record Book Entry** form in FastField, even without signal: it is sent when the device next syncs. Each submission becomes one entry on the project chosen in the form.

- The form offers the seven kinds: statutory appointments, notifiable incidents, control-measure reviews, inspection records, Part 10 notices, provisional improvement notices and correspondence. Corrections are made here in the app.
- A statutory appointment sent from the field also updates the project's **Statutory appointments**, exactly as one made in the app does. See Mine Record Book appointments.
- The entry shows in the list like any other. Its author is the Terra Search account that files field entries, not the person in the field.
- Choose **Files** on the entry to see the form as it was submitted, as one PDF with its photos. The person who recorded it is named in that PDF under **Recorded by**.
- If the same submission is sent twice, the second sends nothing new.
- An entry from the field is corrected, or its action closed, here in the app, like any other.
- If a submission has not shown a few minutes after the device synced, tell Terra Search: each one that could not be recorded is kept with the reason. An appointment is not recorded if it has no position, if its picked appointee is not current senior staff of your profile, or if a typed appointee has no name, no job title or no attestation; nor is any entry without its **Personal details** choice.

Who can be an appointee

For a statutory appointment the appointee list shows the current staff of your profile whose job title is one of: Senior Field Technician, Senior Geologist, Principal Geologist, Exploration Manager, Field Manager, Operations Manager, Drill Supervisor, Director, Managing Director, Chief Operating Officer or Executive Chairman. Anyone else can be typed in, with their job title and your confirmation that they are a senior employee. See Mine Record Book appointments.

Correct an entry

Choose **Correct** on the entry. The panel opens filled in with the old values. Change what is wrong and choose **Save entry**. The correction becomes the current entry, and the old one is struck through. **Correct** shows only on the current version of an entry.

Close an action

On an entry whose action is open, choose **Close action**. The panel opens with the Action state set to "Action closed" and the summary starting "Action closed:". Choose **Save entry**.

See an entry's files

Choose **Files** on the row (the number is how many files it has). Each file shows when it was added and by whom. For each file you can choose:

- **Preview**, for PDFs and images, to see it in the app. **Close** returns you to the list.

- **Download**, which saves the file straight to your device: look for it in your browser's downloads.

Good to know

- On a phone, and on a tablet held upright, the project, the kind and **New entry** sit one above another, and the list, the entry panel and the files panel show one at a time. Each entry is a card: its date, number and author, its kind, summary and action state, its correction link and its buttons.
- Another person's new entry shows only after you leave the screen and come back. Your own saves show straight away.
- Dates show as day, month and year, like 14-Oct-26, and the time a file was added as 14-Oct-26 09:30:00.
- The entries and files shown are the chosen project's. Changing the project loads its own.
- The "open actions" badge counts the whole project, whatever kind you filter by.
- Everything you save here is a real record. See Known behaviours in the beta.

Related pages

- Mine Record Book appointments
- Quick start
- Frequently asked questions

10. Making a statutory appointment in the Mine Record Book

Updated: 23/10/2026 09:49 AWST
App version 1.0.0.21

This page shows how to record a statutory appointment, attach the signed letter that evidences it, and correct an entry. It is written for the app "Xplore Shield MRB". Entries are real records in a statutory record book: they cannot be edited or deleted, only corrected by a later entry.

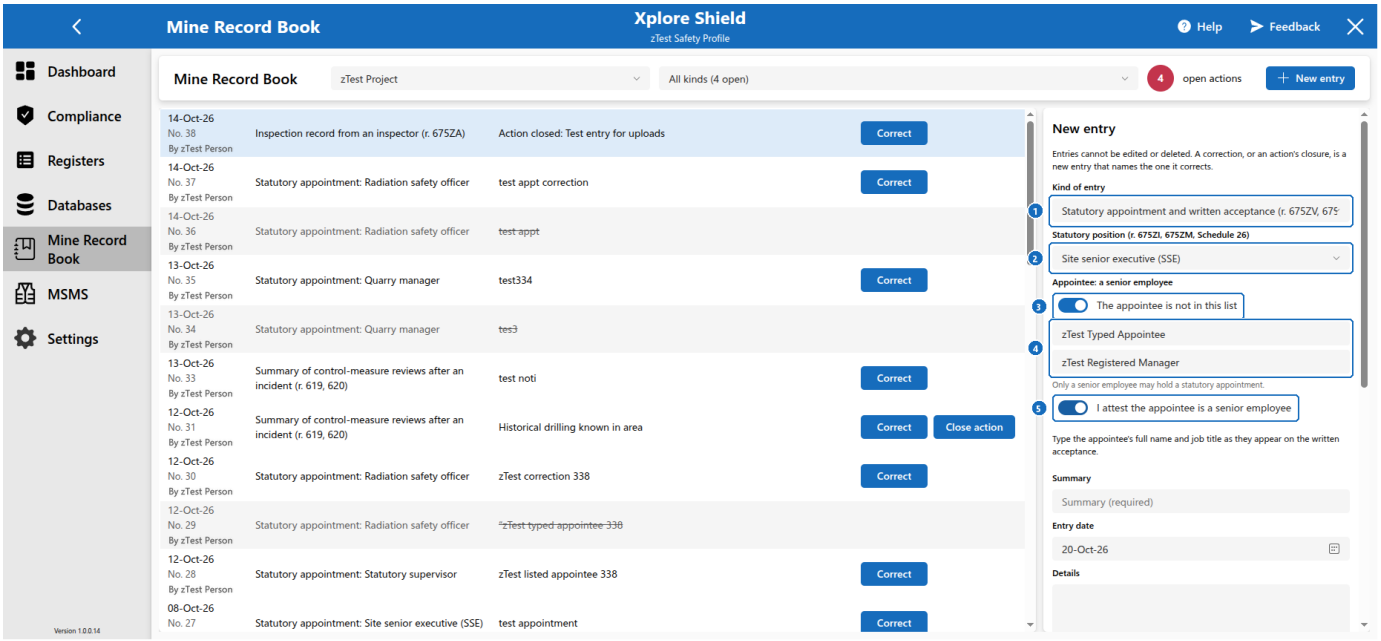
Before you start

Have these to hand:

- the **project** the appointment is for;
- the **position**, one of the 17 statutory positions the app lists (r. 675ZI, 675ZM, Schedule 26);
- the **appointee's full name and job title**; and
- the **signed letter of appointment and written acceptance**, as a PDF or a picture, with a file name that says what it is.

Make the appointment

1. Open **Xplore Shield MRB**. It opens on your own safety profile. Wait for the Dashboard to finish loading.
2. Choose **Mine Record Book** in the menu.
3. In the **Project** list at the top, choose the project. The list shows your profile's projects in alphabetical order.
4. Select **New entry**. The entry panel opens.
5. **Kind of entry**: *Statutory appointment and written acceptance (r. 675ZV, 675ZW)*.
6. **Statutory position**: choose the position.
7. **Appointee**: choose the person from the list. The list shows only current senior staff. If the person is not in it, switch on **The appointee is not in this list**, type their full name and job title, and switch on **I attest the appointee is a senior employee**. Only a senior employee may hold a statutory appointment.
8. **Summary**: a short line, for example "Appointed as exploration manager".
9. **Entry date**: today's date is filled in.
10. **Personal details**: choose *With consent*, because the letter carries the appointee's written acceptance.
11. **Attachments**: add the signed letter.
12. Select **Save entry**. A green message says "Entry added to the Mine Record Book with 1 file". If an amber message says a file did not upload, the entry is saved: add the file with a correction (below).



Make the appointment from the field

Where there is no signal, a senior person can record the appointment in FastField's **Mine Record Book Entry** form instead. It is sent when the device next syncs, and becomes one entry here, with the project's **Statutory appointments** updated exactly as an appointment made in the app updates them.

1. Choose the client, the project and **Recorded by** as for any entry.
2. **Entry Kind**: *Statutory appointment and written acceptance (r. 675ZV, 675ZW)*. The appointment's fields appear.
3. **Position**: choose the position.
4. **Appointee**: choose the person. The list shows your profile's current staff, with the chosen person's job title beneath. Only a senior employee may hold a statutory position: someone whose job title is not one of those in Who can be an appointee is refused when the entry arrives.
5. If the person is not in the list, switch on **The appointee is not in this list**, type their full name and job title, and switch on **I attest the appointee is a senior employee**. Without the attestation the entry is refused.
6. Give the entry its title and **Personal details** (*With consent*, as the letter carries the appointee's written acceptance).
7. **Photograph the signed letter** of appointment and written acceptance into **Photos**. It reaches the entry inside the form's PDF, in its **Files**.
8. Submit.

Corrections, of a field appointment as of any other, are made here in the app, as below. If the appointment has not shown a few minutes after the device synced, check the points above, then tell Terra Search: an entry that could not be recorded is kept with its reason. Sending it again from FastField after a fix records it once.

Check the evidence

- The new entry heads the list, with its number ("No. 31", for example), its date and your name.
- Select **Files 1** on the entry's row, then **Preview** to see the letter, or **Download** to save a copy. Select **Close** when done.
- The project's record: choose **Databases**, then **Projects**, then the project. The Summary's **Statutory appointments** lists each position with its current appointee.

Correct an entry

You cannot change or delete an entry. To fix a mistake, or to add a letter that did not upload:

1. On the entry's row, select **Correct**. The panel opens with the entry's details filled in, headed "Correct No. ..." with the entry's number and date.
2. Change what was wrong, add any file, and attest again if you typed the appointee.
3. Write in **Summary** what the correction fixes, then select **Save entry**.

The correction becomes a new entry that names the one it corrects, and the project's statutory appointments update to match. The corrected entry stays in the book, marked "Superseded by No. ...".

When something goes wrong

What you see	What to do
"No projects under ..."	You are on a profile with no projects. Contact Terra Search.
A note that you cannot read the Staff Database, or that no senior staff are listed	Type the appointee's full name and job title in the boxes shown, and attest.
Save entry stays grey	Something required is missing: the kind, the project, the summary and, for an appointment, the position and the appointee (a typed appointee needs the name, the job title and the attestation).
"The entry was saved, but the project's statutory appointments were not updated"	Correct the entry and save again.
"The file could not be opened"	Use **Download** instead, or contact Terra Search.

Anything else, or a wrong entry you cannot fix with a correction, goes to Terra Search: use **Feedback**, or contact Terra Search directly if it stops you working.

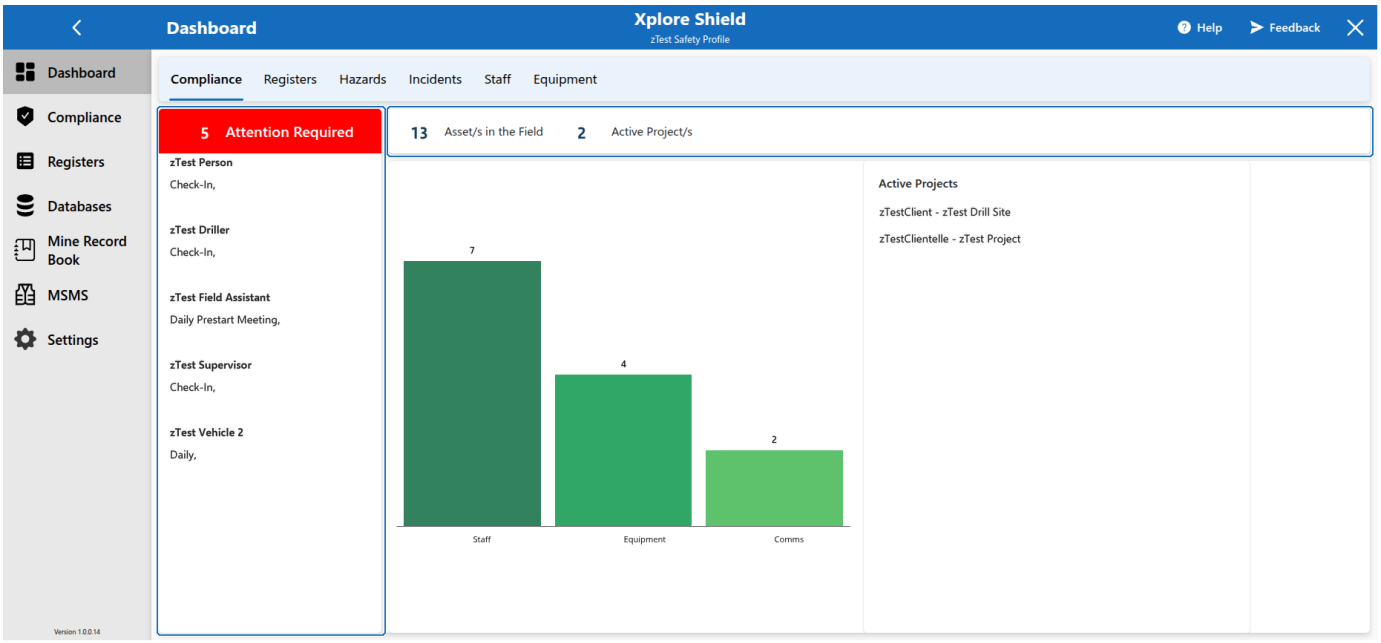
Related pages

- Mine Record Book
- Quick start
- Frequently asked questions

11. Dashboard screen

Updated: 28/10/2026 15:50 AWST
App version 1.0.0.21

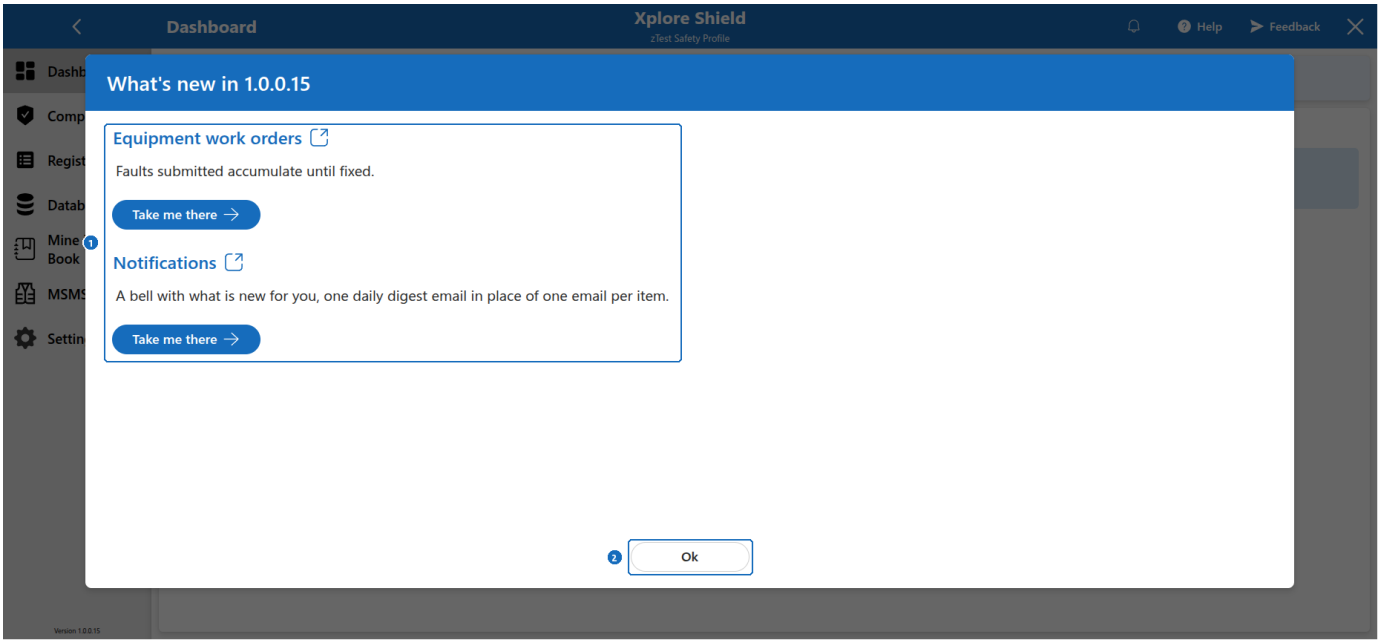
The Dashboard is the first screen you see. It opens on **For you**, your unread notices, and then summarises your safety profile one tab at a time, with an **Attention Required** list on the left of things that need someone to look at them, and figures and charts on the right.



What's new

When you open a new release, a **What's new** notice covers the Dashboard: "Select a new feature below to read the write-up", then the release's features, each title a link to its help page, with one line under it and a tick box at its left. **Ok** closes it; **Take me there** closes it and opens that feature, with a short tour where there is one, a card with **Next**, **Back** and **Skip** (the Tab key reaches its buttons once the card has focus). Nothing behind it can be used until it is answered.

Since 1.0.0.18 the notice remembers what you want: every box is ticked to start, and **Remind me next time** beside **Ok** sets them all at once, showing a filled square when only some rows are ticked. A ticked row returns at your next start; untick a row and that feature stays off the notice; untick every row and the notice stays away until the next release has something new. The choices are kept per person on the Xplore Shield Notices Seen list, nowhere else.



Tabs

Choose a tab along the top: **For you**, **Compliance**, **Registers**, **Hazards**, **Incidents**, **Staff** or **Equipment**. It opens on For you.

Tab	Attention Required lists	Right-hand side
For you	Your unread notices, newest first, with three tiles counting the Critical, Action and Digest ones; a tap opens a notice, a tile opens the notifications panel. If you can switch profile, a line gives today's compliance additions and how many items need attention. See Notifications	None: the counts and charts are under the other tabs
Compliance	Staff, equipment and comms devices that are in the field and have a problem: missing forms, a low battery or a device not turned on	Assets in the field, active projects, and a chart of staff, equipment and comms in the field
Registers	Forms in the date range marked "Attention Required"	Number of forms, prestart hours, forms per day, form submissions by name
Hazards	Open hazards, newest first	Unreviewed hazards, and charts of initial and residual risk
Incidents	Open incidents	Open investigations, and a chart of incident types
Staff	People with a licence or certificate expiring soon	Number of staff, a count of field technicians and geologists, and how many hold each skill
Equipment	Equipment due or overdue for service, or with an out-of-date fire extinguisher tag	Equipment and inspection counts, equipment by type, and inspections per item

The number beside "Attention Required" is the number of rows in the list.

Open a record

Choose a row in an Attention Required list to open the record behind it: the staff, equipment or comms compliance record, the hazard or incident report, the Staff or Equipment Database record, or, on the Registers tab, the form's first attachment in a viewer (**Download** there saves the file to your device; hold Ctrl and turn the mouse wheel to zoom).

Change the date range

On the **Registers** and **Equipment** tabs, **From** and **To** sit in a row of their own under the figures and set the dates the forms and inspections come from. They start at the last 30 days. Choose the small cross beside a date to put it back. **To** cannot be earlier than **From**. After you change a date the forms load again, which can take a moment.

Good to know

- The Dashboard refreshes by itself every 15 seconds, but only the tab you are on.
- The middle of the blue bar shows **Xplore Shield** and, beneath it, the safety profile you are working in, on every main screen.
- Your safety profile is picked for you, from the profile whose users include your account. If the Dashboard shows another organisation's data, or nothing, send a report.
- The Terra Search staff listed as profile switchers on Terra Search's own safety profile in the Intranet can switch profile: a **Safety profile** row under **Settings** in the menu, on every main screen, opens a short list of profiles; choosing one moves the whole app to that profile, clears the filters and reloads the screen they are on. Nobody else sees the row.
- On a phone the Dashboard stacks: the Attention Required list, then the figures, each with its caption, the dates on two lines, then the chart and the list beneath it; the tab row scrolls sideways. On a tablet held upright it stacks the same way, the summary list showing up to eight rows under the chart; on a tablet held sideways the chart sits above its list and the right-hand column scrolls.

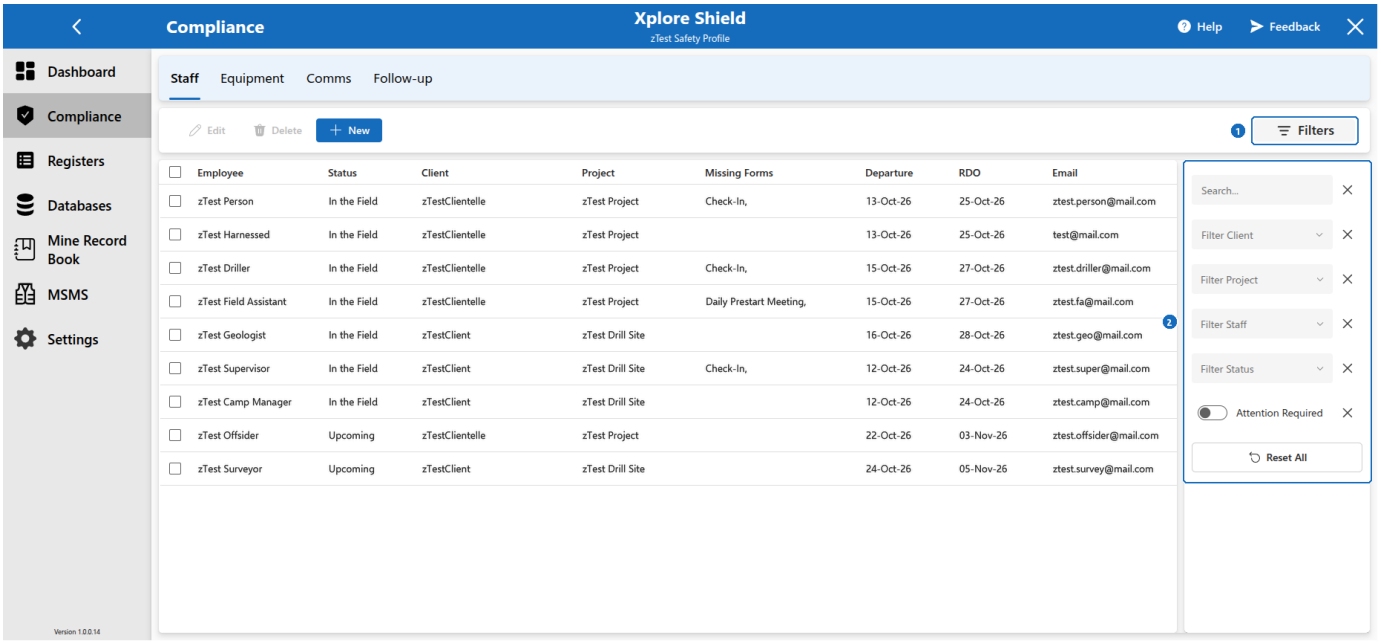
Related pages

- Compliance, Registers
- Hazard report, Incident report
- Staff database, Equipment database

12. Compliance screen

Updated: 19/10/2026 10:45 AWST
App version 1.0.0.21

Compliance shows which people, equipment and comms devices are in the field on your projects, and which forms each still owes. Open it from **Compliance** in the menu.



Look at a list

1. Choose a tab: **Staff**, **Equipment**, **Comms** or **Follow-up**. It opens on Staff. All four show in the same list, whose columns change with the tab.
   - **Staff**: Employee, Status, Client, Project, Missing Forms, Departure, RDO and Email.
   - **Equipment**: Equipment, Rental Details, Status, Client, Project, Missing Forms and Departure.
   - **Comms**: Comms, Status, Client, Project, Last Tracking, Battery and Departure.
   - **Follow-up**: Created, Asset, Category, Form Name, Status, Project, Staff On-Site, Issue and Comments, newest first.
2. To narrow the list, choose **Filters**. On Staff, Equipment and Comms you can type in **Search...** (it finds text anywhere in the person's, item's or device's name), and choose a client, project, person, item or device, and a status. Switch on **Attention Required** to see only rows with missing forms (on Comms: a low battery, or no tracking today). **Reset All** clears every filter.
3. The list refreshes itself every 15 seconds. It waits while you have rows ticked, so untick them to see new records.

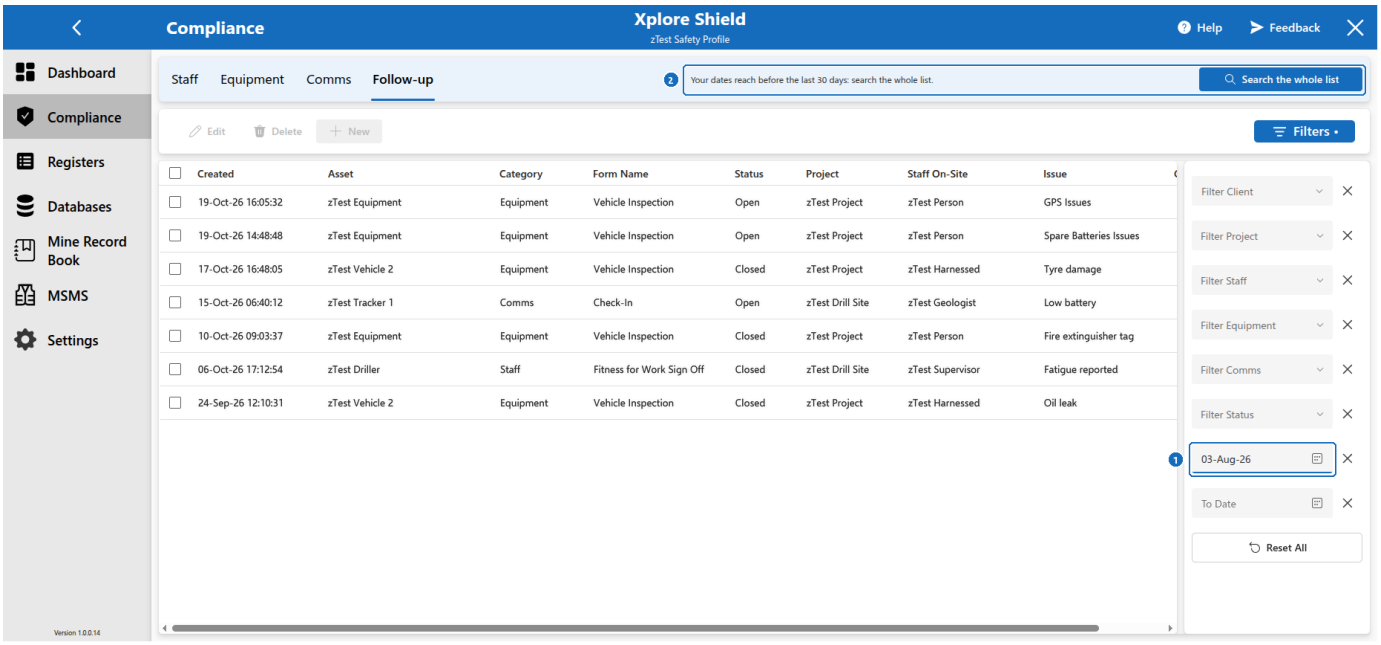
While a filter narrows the list, the **Filters** button is blue with a dot (**Filters •**); with none in use it is white. When the filters leave the list empty, it says "Nothing matches the filters in use" with a **Reset filters** button, which clears every filter, the client, project, person, equipment and device carried from other screens included. A view with no records at all says "No records".

Follow-ups: the last 30 days, and older ones

The Follow-up tab shows the last 30 days. A note beside the tabs says so. To find an older follow-up:

1. Choose **Filters** and set a **From Date** earlier than 30 days ago. Set a **To Date** if you want one.
2. The note changes and a **Search the whole list** button appears. Choose it.
3. The list shows the matching follow-ups from the whole list, and the note says how many. It reads at most 2,000 rows at a time: if it says so, narrow the dates.

Changing a date again takes the list back to the last 30 days.



Add or change a record

- **New** opens a blank record for the tab you are on: a person, a piece of equipment or a comms device. Follow-ups are made by the forms, so **New** is greyed on that tab.
- To change one, tick **one** row and choose **Edit**. Each record has its own page: Staff compliance, Equipment compliance, Comms compliance. A follow-up opens in Compliance form.

Delete a record

Tick one or more rows and choose **Delete**. The app asks "Are you sure you want to delete N record/s?" and warns that this removes the item from the field and stops all its compliance notifications. Deleting is permanent. If someone has only finished on a project, change the record's status instead. A person who is still on site and submits a form that adds people is added back, with another "added" email. On the Follow-up tab, Delete removes the follow-up itself.

Good to know

- On a phone the list shows as cards, one row each: the name in bold and three lines beneath it. Tap a card to choose it (it shades) for **Edit** or **Delete**, and tap it again to let it go; **Filters** opens over the list. The follow-ups' note sits above the cards, and above the list on a tablet held upright.
- Filters you choose here stay applied on other screens, such as Registers, until you choose **Reset All** or **Reset filters**.
- Who is added to these lists, and what takes them off, is on the Staff compliance and Equipment compliance pages.
- Items that stay in "Missing Forms" though nobody can submit them, and the "added to the list" emails, are answered in the Frequently asked questions.

Related pages

- Dashboard
- Registers
- Why an exploration MSMS matters

13. Staff compliance record

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

A staff compliance record says which forms a person must submit on one project and when. You reach it from **Compliance**, **Staff** tab: choose **New**, or tick one row and choose **Edit**. A row on the Dashboard's Attention Required list opens it too.

Add a person to a project

1. Choose **Employee**, **Client** and **Project**. The Project list shows only the chosen client's projects. The small **New** and **Edit** buttons beside them open the Staff, Clients and Projects databases.
2. Check **Departure** (today unless you change it) and **RDO**.
3. The form requirements fill in from the project's own settings. Change any that need to differ for this person.
4. Choose **Save**. **Save** stays greyed until you change something. If a required field is empty, the app says "Fill out the fields marked in red" and names them. The record appears in the Compliance list straight away.

The status is set for you: "In the Field" from the departure day, or "Upcoming" if the departure is later.

Notifications

The **Notifications** switch controls the person's reminders. It can be changed once the employee, client and project are chosen. Turning it off opens a "Compliance Warning": the reminders are a safety measure, so you must give the reason. Type it in **Provide reason...** and choose **Save** in the box. The reason is kept straight away as a follow-up record, "Compliance Notifications Disabled", and the notifications stay off. **Cancel** puts them back on. If you then leave the record with **Discard**, the follow-up is removed again.

How people join and leave the list

You usually do not add people by hand. Their own forms add them.

What adds a person. The forms ticked under **Staff Trigger Forms** on the project's record add the people they name:

- Journey Management Plan (Start Shift, or Other/Logistics);
- Check-In (Continue Shift);
- Emergency Response Plan;
- Fitness for Work Sign Off;
- Weekly Toolbox Meeting;
- Site Induction;
- Daily Prestart Meeting.

A **Safety Briefing** adds the people it names whatever the project's settings say, and they stay "Upcoming" until their departure date. Forms that are not ticked add nobody. Some forms never add anyone: JSEAs, Camp Site Setup, Client Safety Audit, Drill Rig Inspection, the program checklists and the Daily Report. They only mark an item done for someone already on the list.

The conditions. The person needs a staff record on the project's safety profile and, for most forms, **Compliance Notifications** switched on in their staff record. A **Daily Prestart Meeting** adds an attendee only if the person has exactly one staff record on the profile, is not marked **Contractor**, and the prestart reaches the system on the day it is for.

The "added" email. Each time someone is added, an email goes to everyone listed under **Compliance Reports** on Settings: "<name> was added to the Staff Compliance list". It is sent for every addition, however it happened, one per person each time. A person is added again at the start of each new swing after being returned, so a site with rotating crews gets these often. It confirms that the crew's own forms put them on the list. Terra Search plans to gather each day's additions into one email.

What takes a person off.

- A **JMP End Shift** marks the person Returned once the return date on it has arrived, in the project's time zone. A later return date keeps them In the Field until then.
- A **Check-In End Shift** marks them Returned if it is their first check-in that day. If they already checked in that day it changes nothing, and they get a "Duplicated Check-In" email.
- **Overnight**, at about 1am in the project's time zone, people marked Returned come off the list, and anyone In the Field whose return date is that day is marked Returned. Only that exact day counts: if the date passes without the overnight run catching it, the person stays on.
- **By hand:** on Compliance, Staff tab, tick the person and choose **Delete**. This is the way to remove someone who left

without submitting an End Shift form.

Coming off the list stops the person's reminders and takes them off the daily report. It does not stop a future "added" email: one comes again when they next start work.

Good to know

- Changing a project's requirements later does not change records that already exist. The project's settings apply only to new records.
- **Back** asks "Do you want to save changes?" only if you changed something: **Discard** leaves without saving, and the small cross keeps you editing.
- Requirements that are due show pale red, so you can see at a glance what the person owes.

Related pages

- Compliance
- Projects database
- Staff database

14. Equipment compliance record

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

An equipment compliance record says which inspections a piece of equipment needs on one project. You reach it from **Compliance**, **Equipment** tab: choose **New**, or tick one row and choose **Edit**.

Add equipment to a project

1. Choose the **Type** (it starts on Light Vehicle), then the **Equipment**. The list shows only equipment of that type. Quad Bike and the old "Vehicle" type are not offered for new records.
2. Choose the **Client** and **Project**, and the **Departure Date**.
3. The inspection requirements fill in from the project's vehicle settings. Departure, on-site (daily, weekly) and return forms are in their own sections.
4. If the equipment's name contains "(Rental/Other)", fill in **Rental Details**.
5. Choose **Save**. **Save** stays greyed until you change something. If a required field is empty the app says "Fill out all required fields". The record appears in the Compliance list straight away.

The status is set for you from the departure date. Type and Equipment cannot be changed once the record exists.

How equipment joins and leaves the list

What adds equipment. The forms ticked under **Equipment Trigger Forms** on the project's record add equipment that is in the Equipment database on the profile and not already on the list:

- a Journey Management Plan or Emergency Response Plan adds each vehicle, caravan, generator, quad bike or trailer it lists, except rentals;
- a Vehicle Equipment Checklist adds equipment on a Pre-Campaign;
- an inspection adds the item when its type puts it into use:

Form	Types that add it
Vehicle Inspection	Pre-Campaign, Daily, Weekly, Unused, Hire Out, Parked (added as Parked)
Caravan Inspection	Pre-Campaign, Weekly, Towing, Parked
Generator Inspection	Pre-Campaign, Daily, Weekly, Unused, Parked
UTV Inspection	Pre-Campaign, Daily, Unused, Parked
Trailer Inspection	Pre-Campaign, Daily, Unused, Parked

A **Safety Briefing** adds the equipment it lists, as "Upcoming". Each addition sends the same "added" email as for people, to everyone listed under **Compliance Reports** on Settings.

Hired or "other" equipment is recorded against a placeholder, such as "Generator (Rental/Other)", and told apart by the rental details typed on the form. If the details are typed differently each time, the same hired unit becomes a second item on the list, with its own "added" email and its own daily reminders. **Type the rental details the same way every time**, for example the registration or serial number alone.

What takes equipment off.

- A **Return inspection** marks it Returned, on the Vehicle, Caravan, Generator, UTV, Trailer, Forklift or Loader Inspection. Overnight it comes off the list and an email says so.
- A Return on the Vehicle Equipment Checklist, or on the Vehicle & Machinery Hygiene Inspection, does **not** take it off.
- A JMP End Shift does not take vehicles off: it records a return date only.
- **Parked** takes an item out of the daily inspections without taking it off the list.
- Nothing takes equipment off by date.
- **By hand:** on Compliance, Equipment tab, tick the item and choose **Delete**.

A project can tick "Quad Bike Inspection", but no form has that name: quad bikes and side-by-sides use the UTV Inspection.

Good to know

- **Back** asks "Do you want to save changes?" only if you changed something.

- Requirements that are due show pale red.

Related pages

- Compliance
- Equipment database
- Projects database

15. Comms compliance record

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

A comms compliance record covers one communications device, such as a GPS tracker, on one project. You reach it from **Compliance**, **Comms** tab: choose **New**, or tick one row and choose **Edit**.

Add a device to a project

1. Choose the **Type** (it opens on "GPS Tracker") and then the **Comms** device.
2. Choose the **Client**, **Project** and **Departure**.
3. In **Crew & Equipment**, choose the crew who carry it and the vehicle it travels in.
4. Choose **Save**. **Save** stays greyed until you change something. If a required field is empty the app says "Fill out all required fields".

The status is set for you from the departure date.

Tracking

When you edit a device that has a tracking feed, a **Tracking** section shows its battery and last tracking time. These are read-only; the last tracking time shows green if it is from today and red if it is older. The **Tracking** switch works only if tracking is turned on for the device in the Comms database; otherwise it says "Disabled in Database".

Related pages

- Compliance
- Comms database

16. Follow-up record (Compliance form)

Updated: 14/10/2026 11:22 AWST

App version 1.0.0.21

A follow-up record is a note that something needs attention, for example that a person's notifications were switched off and why. You open one from **Compliance**, **Follow-up** tab: tick one row and choose **Edit**.

Close a follow-up or add a comment

1. Change the **Status** to "Closed", or leave it Open.
2. Type in **Comments**. A comment is required to close a record.
3. Choose **Save**. The app returns to Compliance. **Save** stays greyed until you change something, and the app says "Fill out all required fields" if a required field is empty.

Only **Status**, **Comments** and the attachments can be changed. Everything else on the record is read-only. You cannot start a new follow-up here.

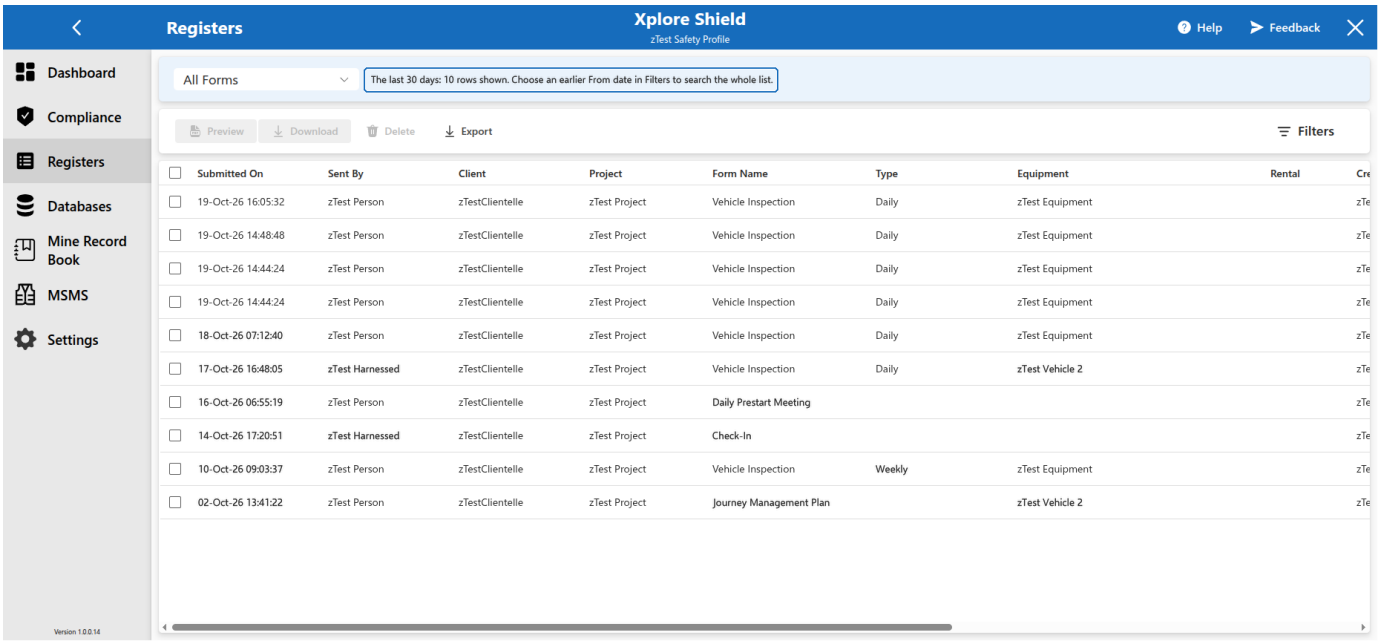
Related pages

- Compliance
- Staff compliance

17. Registers screen

Updated: 02/11/2026 10:12 AWST
App version 1.0.0.21

Registers is where the forms your crews submit are kept and read: hazard and incident reports, Take 5s, inspections, prestart meetings, check-ins, journey management plans (JMPs), emergency response plans (ERPs), job safety analyses (JSEAs) and inductions. Open it from **Registers** in the menu.



Open a register

Choose one in the list at the top. It opens on **All Forms**. The others are **Hazard Reports**, **Incident Reports**, **Take 5s**, **Equipment Inspections**, **Drill Rig Inspections**, **Daily Prestart Meeting**, **Check-Ins**, **JMPs**, **ERPs**, **JSEAs** and **Inductions**. Each shows in the same list, newest first, with that register's own columns followed by Project, Client, Sent By and Submitted On.

A note beside the register list says what you are looking at:

- the large registers (All Forms, Take 5s, Equipment Inspections, Daily Prestart Meeting, Check-Ins, JMPs and Inductions) show **the last 30 days**, with the number of rows shown;
- the small ones (Hazard Reports, Incident Reports, Drill Rig Inspections, ERPs and JSEAs) show **all of your profile's records**.

The list refreshes itself every 15 seconds. It waits while you have rows ticked, so untick them to see new forms.

On a phone the list shows each form as a card, with the date, who sent it and its client and project; tap a card to choose it for **Preview**, **Download** or **Delete**. The count line sits above the cards, **Filters** opens over them, and **Export** and the other buttons the toolbar has no room for are under its "...". On a tablet and a computer the list keeps its columns and fills the window.

Find older forms

1. Choose **Filters** and set a **From Date** earlier than 30 days ago. Set a **To Date** if you want one.
2. The note changes and a **Search the whole list** button appears. Choose it.
3. The list shows the forms from the whole register between your dates, and the note says how many. It reads at most 2,000 at a time: if it says so, narrow the dates.

Changing a date again takes the list back to the last 30 days.

Filter and search

Choose **Filters**. Depending on the register you can filter by client, project, the person who sent the form, equipment, form name (All Forms), status (Open or Closed, for hazards and incidents), **Attention Required** (All Forms and Daily Prestart Meeting) and dates. **Reset All**, at the foot of the filters, clears every filter. On a large screen every filter and **Reset All** are in view; where they cannot all fit, a line at the panel's foot reads "▼ Scroll for more and Reset All": scroll the panel to reach them. Filters you choose here stay applied on other screens until you reset them.

While a filter narrows the list, the **Filters** button is blue with a dot (**Filters •**); with none in use it is white. When the filters leave the list empty, it says "Nothing matches the filters in use" with a **Reset filters** button, which clears every filter, the client, project, person, equipment and device carried from other screens included. A register with no forms at all says "No records".

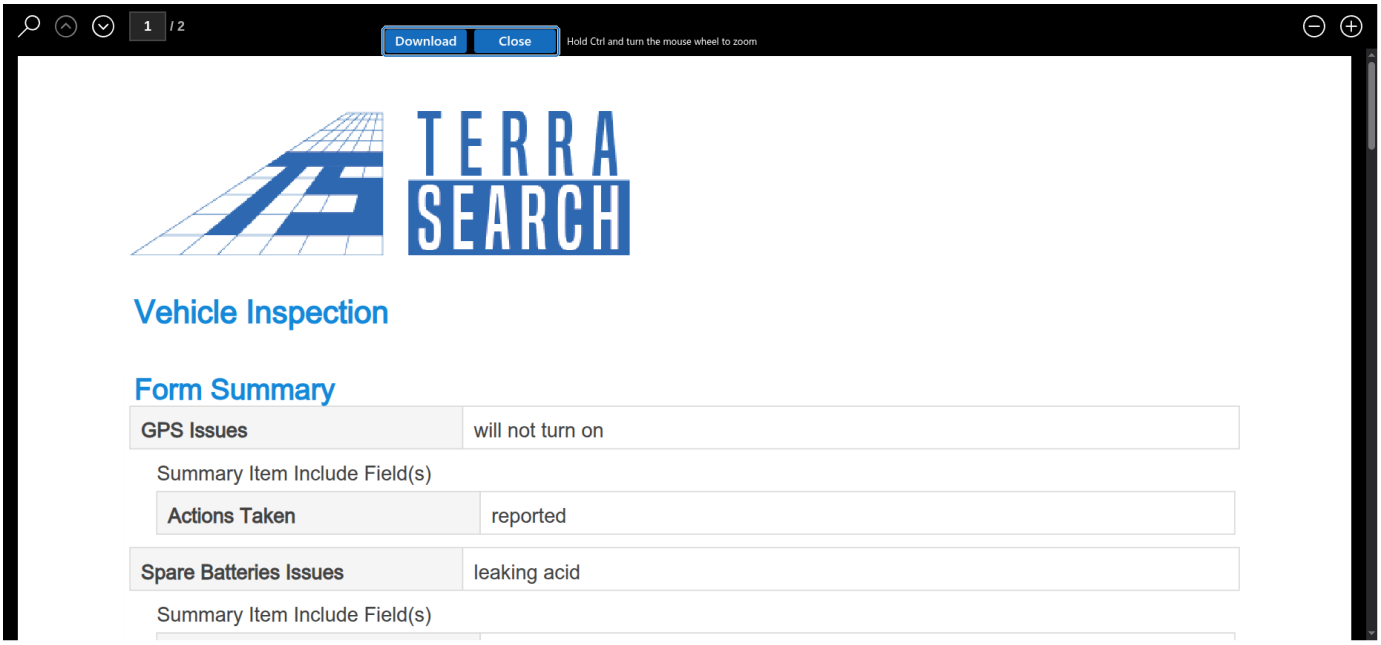
Search... narrows the rows already in the list: it looks for your text in Sent By, Client, Project and the register's first column. It does not reach older forms on its own. To find an old form by a word, search the whole list by date first, then type in Search.

Get a form's PDF

Only **All Forms** holds the PDF of each form. The other registers show what was entered on the form, without the PDF, and many forms, the Daily Report among them, have no register of their own: find them in All Forms. The register lists on the Intranet hold the answers without the PDF too.

1. Choose **All Forms**.
2. In **Filters**, choose the form name, for example Daily Report, and narrow it by client, project, person or dates.
3. Tick **one** row.
4. Choose **Preview** to see the PDF, or **Download** to save it.

Preview shows the form full screen, with **Close** and **Download**. Hold Ctrl and turn the mouse wheel to zoom. **Download** saves the file straight to your device through your browser: look for it in the browser's downloads. If the app says "The form's file has not arrived yet, or the form has none", wait a moment and try again: a form sent from the field can take a while to arrive.



Other actions

Tick rows, then:

- **Edit**: on Hazard Reports and Incident Reports, with one row ticked. See Hazard report and Incident report.
- **Delete**: on every register but Take 5s, with one or more rows ticked. The app asks you to confirm. Deleting permanently removes the submitted record.

Export to CSV

Export writes the register to a CSV file in the Intranet's **Xplore Shield Work Orders** library, under **Exports** in a folder of your own that opens for you and the Intranet's owners alone, and downloads it in one tap. It needs no OneDrive and opens no other tab. From release 1.0.0.20 it works on every register. It needs no rows ticked. It applies your filters, dates and Search text. Any character a file name cannot hold, such as / or :, becomes a hyphen in the file's name. It holds no PDFs. Its date and time columns, Submitted On among them, are in your own time zone. While it works a shade covers the screen and a card says **Exporting…**.

Each CSV leads with **Submitted On**, **Sent By**, **Client** and **Project** (Inductions has no project), then the register's own columns as its list shows them:

- **All Forms**: Created, Submitted On, Form Name, Inspection Type, Sent By, Relevant Date, Client, Project, Crew, RDOs, Equipment, Rental Rego, Comms, Comments, Issues.

- **Hazard Reports**: Status, then Form Name, Location of Hazard, Activity, Hazard Type, Hazard Description, Initial Risk Level, Corrective Controls, Residual Risk Level, Further Actions, Risk Outcome, Comments.
- **Incident Reports**: Investigation Status and Incident Date, then Incident Type, Incident Location, People Involved, Incident Description, Environmental Incident, Person Injured, Investigation Findings, Outcome / Action following, Comments.
- **Take 5s**: Coached By, Task, Hazards, Controls Implemented.
- **Equipment Inspections**: Inspection Type, Form Name, Equipment, Rental Rego, Crew, Departure Date, From, To, Comms, Odometer, Next Service, Next Service Date, Fire Extinguisher, Last Inspection Tag, Comments.
- **Drill Rig Inspections**: Drilling Company, Rig Type, Rig Number, Support Vehicles, Matters to be rectified, Comments.
- **Daily Prestart Meeting**: Accommodation, Company Hours, Contractor Hours, Total Hours, Lost Time, Company Attendees, External Attendees, Activities, Field Activities, Other Activities, Comments.
- **Check-Ins**: Staying at, Crew, External Crew, RDO, Activity, Other Activity, Drilling Method, Holes Drilled, Meters Drilled, Soil Samples Collected, Work Tomorrow?, Next Day Activities, Next Day Other Activity, Destination, Comments.
- **JMPs**: Crew, Trip Reason, Departure Date, From, To, Flight Details, Equipment, Comms, Comments.
- **ERPs**: Departure Date, Employees, GPS Trackers, Equipment, Work Site Coordinates, Name and Link, then the Accommodation, Medical Clinic, Hospital, Police and Airfield name, address, phone and link, the Airfield ICAO, Comments.
- **JSEAs**: Crew, JSAs, Comments.
- **Inductions**: Induction, Score, Comments.
- **Compliance Register**: Created, Status, Client, Project, Category, Staff On-Site, Asset, Form Name, Details, Comments.

Related pages

- Dashboard
- Compliance
- Frequently asked questions

18. Hazard report screen

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

This screen lets you review and update a hazard report that has already been submitted. It does not create new hazard reports. They arrive from the field form.

You reach it from **Registers**, **Hazard Reports**: tick a row and choose **Edit**. A row on the Dashboard's **Hazards** tab opens it too.

Update a hazard

1. Check the report: where, what type, the description, the initial risk level and the corrective controls.
2. Fill in or change **Residual Risk Level**, **Further Actions**, **Risk Outcome** and **Comments**.
3. To close the hazard, change **Status** to "Closed".
4. Choose **Save**. **Save** stays greyed until you change something. The Registers list and the Dashboard's open hazards update straight away, and a closed hazard leaves the open list.

Back asks "Do you want to save changes?" only if you changed something. The **Back** and **Save** buttons are at the bottom of the form.

Good to know

- You are changing the original record. Be sure of the change.

Related pages

- Registers
- Dashboard
- Incident report

19. Incident report screen

Updated: 14/10/2026 11:22 AWST

App version 1.0.0.21

This screen lets you review and update an incident report that has already been submitted, mainly to record the investigation. It does not create new incident reports. They arrive from the field form.

You reach it from **Registers**, **Incident Reports**: tick a row and choose **Edit**. A row on the Dashboard's **Incidents** tab opens it too.

Update an incident

1. Check the report: date, type, location, people involved and description.
2. Set **Investigation Status** to Open or Closed. This is the only required field.
3. Record **Investigation Findings**, **Outcome / Action following** and **Comments**.
4. Choose **Save**. **Save** stays greyed until you change something.

Back asks "Do you want to save changes?" only if you changed something. The **Back** and **Save** buttons are at the bottom of the form. After saving the Dashboard's open incidents update straight away.

Related pages

- Registers
- Dashboard
- Hazard report

20. Databases screen

Updated: 29/10/2026 12:40 AWST
App version 1.0.0.21

Databases holds the lists everything else is built on: your staff, equipment, comms devices, clients and projects. Open it from **Databases** in the menu. It shows only your own safety profile's records.

Find a record

1. Choose a tab: **Staff**, **Equipment**, **Comms**, **Clients** or **Projects**. It opens on Staff.
2. Type in **Search...**, or choose **Filters** to narrow by name, type, client, status or, for staff, skills and expiring licences. **Reset All** clears it. While a filter is in use the **Filters** button is blue with a dot. A filter chosen on one tab, such as a job title, stays set when you change tab, so if the next list is empty it says "Nothing matches the filters in use"; **Reset filters** clears them.
3. Tick the row.

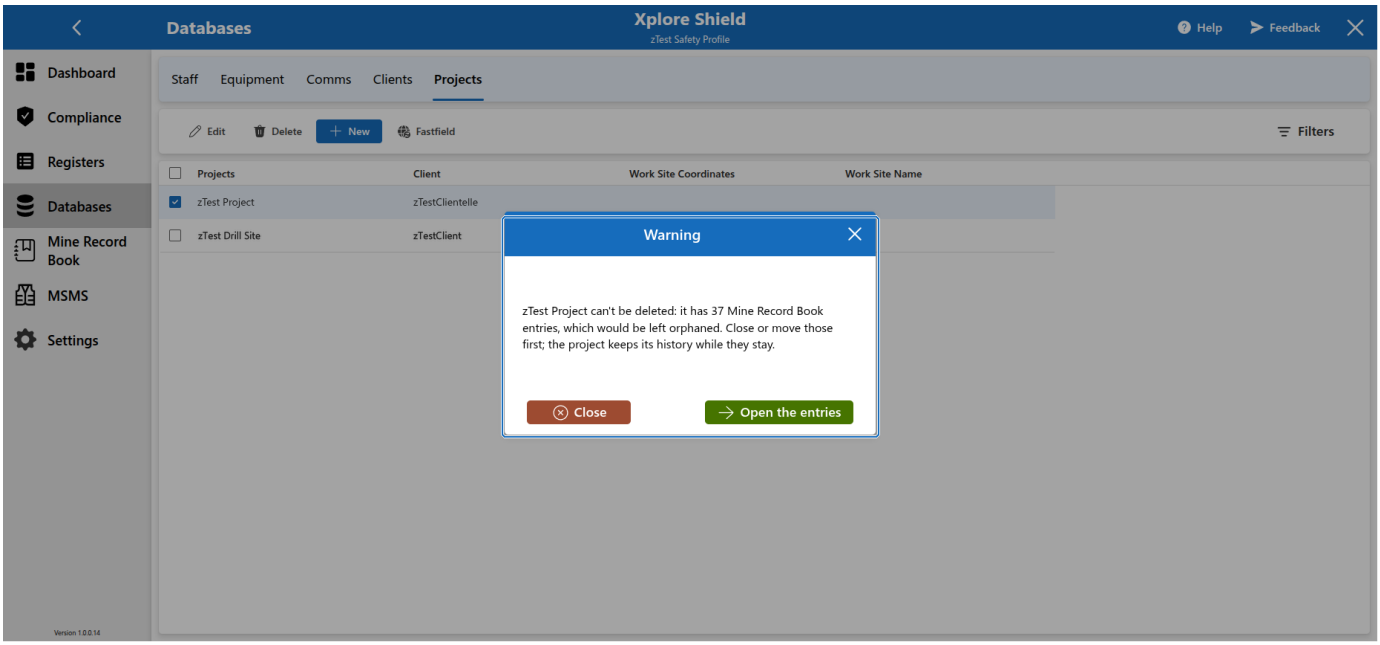
On the **Equipment** tab an **Open defects** column beside the name sums each asset's open faults as its Defects panel combines them, with the worst category and its dot: □ **3 open · A** means three faults, one of them Category A - do not operate; amber for B, blue for C, white for faults not yet rated. A **Service** column beside it says □ **service overdue**, □ **service due soon**, □ **extinguisher expired** or □ **extinguisher due** (within 30 days), and is blank when both are in order. The list runs worst category first, then the most urgent service, then the least left to the next service, then the name, so an asset that must not be operated is at the top; the search, the filters and the **Attention Required** switch narrow it as before. The Fire Extinguisher Expiry column shows the date as the Next Service (Date) column does. See Equipment defects and work orders.

Add, change or remove

- **New** opens a blank record. **Edit** opens the ticked row, and works only with exactly one row ticked. Each record has its own page: Staff database, Equipment database (whose record carries the Defects panel and work order), Comms database, Clients database, Projects database.
- **Delete** removes the ticked rows, but only if nothing points at them. The app asks "Are you sure you want to delete N record/s?" and the delete is permanent. To retire something without deleting it, change its record instead: set a person's Current to NO, an asset's Active off, or a client's Status to Inactive.

When a delete is refused

If an item is still being tracked in a compliance list, or Mine Record Book entries name it, the app will not delete it. Nothing else is deleted with it, because that would erase compliance history. A box tells you which row, what points at it and what to do instead, for example "<name> can't be deleted: it has 2 staff compliance records and 1 Compliance Register entry, which would be left orphaned." It then says to close or move those first, or to set the person's Current to NO, turn the equipment's or device's Active off, or set the client's Status to Inactive, which keeps the history. For a project the entries are compliance records, Compliance Register entries and Mine Record Book entries; a project has no inactive state, so it stays while they do. If you ticked several rows, the box names the first row held and how many more are held the same way, and the rows that nothing points at are deleted; the message then says how many were kept. Choose **Close** to close the box, or **Open the entries** (**Entries** on a phone) to go to the screen that holds them, with the row already chosen as the filter: a person's, an asset's or a device's compliance records, a project's people, or a client's projects.



Getting changes onto the field forms

Saving a person, a piece of equipment, a device, a client or a project here does not send it to FastField, and the app tells you so after each save (see "After you save" below). The drop-down lists in the field forms are filled from your Databases at two moments:

- **Overnight, by itself.** At 1:00 am Western Australia time, every change saved since the last upload goes across. You do nothing.
- **Straight away, if you ask.** Choose **Fastfield** in the toolbar, then **Sync**, on the tab you changed: Staff, Equipment, Comms, Clients or Projects. A box shows how many syncs your organisation has left today. The allowance is eight a day, shared by everyone in your organisation, and it starts again at 1:00 am. The app says "Started Sync Process" and then reports success or failure. It takes a couple of minutes. **Sync** is greyed when no syncs are left today, and while a sync is running.

After you save. A green note says "Saved. FastField gets this change at the 1:00 am upload, or straight away through Fastfield → Sync". It does not stop you: carry on working. On the tab you saved, the **Fastfield** button in the toolbar turns blue with a dot, "Fastfield •", until you choose **Sync** or move to another tab. When your organisation has no syncs left today, the note says the change goes at the 1:00 am upload, with "(no syncs left today)", and the button stays as it is. If a save fails, the app shows what went wrong instead, and no note.

Then sync FastField on the phone. A phone keeps the lists it last downloaded until FastField syncs. After the overnight upload, or after a **Sync**, open FastField on the phone and sync it, and the new names appear.

Nothing is wrong when a change is not there yet. A change saved after 1:00 am reaches the field forms the next morning, unless someone chooses **Sync** first.

Good to know

- On a phone each tab's list shows its records as cards, the name and a line or two beneath it; tap a card to choose it for **Edit** or **Delete**. An equipment card carries a badge at its top right, □ **3 open · A** in the category's colour or **no open defects** in grey. The tab row scrolls sideways, **Filters** opens over the cards, and the buttons the toolbar has no room for, **Fastfield** among them, are under its "...". On a tablet and a computer the lists keep their columns and fill the window.
- Equipment and comms items with "(Rental/Other)" in the name are not listed.
- The list refreshes every 15 seconds, but not while a row is ticked or a box is open. Untick to see new records.
- The confirmation box says "Asset" whatever you are deleting.

Related pages

- Staff compliance
- Quick start
- Frequently asked questions

21. Staff database record

Updated: 16/10/2026 13:49 AWST
App version 1.0.0.21

A staff record holds one person's details. Reach it from **Databases**, **Staff** tab: choose **New**, or tick one row and choose **Edit**.

Add or change a person

1. Use the tabs across the top to move between sections: **Summary**, **Contact Details**, **Visa**, **Licences & Certificates** and **Inductions**. **All** shows every section at once.
2. Fill in the required fields. On **Summary**: **Job Title**, **Current** and **Date Hired**. On **Contact Details**: **First Name**, **Surname**, **Email #1** and **Mobile Phone #1**. A new person needs all of them, so use **All** or Contact Details.
3. Choose **Save**. **Save** stays greyed until you change something. If something required is missing, the app names it.

Saving does not update FastField at once, and the app says so: after each save a green note gives the 1:00 am upload, or straight away through **Fastfield**, then **Sync**, on the Staff tab, and the **Fastfield** button stays blue with a dot until you sync or change tab. See "Getting changes onto the field forms" on Databases.

Names

Enter each name as it appears on the person's passport, driver's licence or other identity document. Keep **First Name** and **Surname** to those names. A nickname goes in **Other Names**, never in the first name or surname.

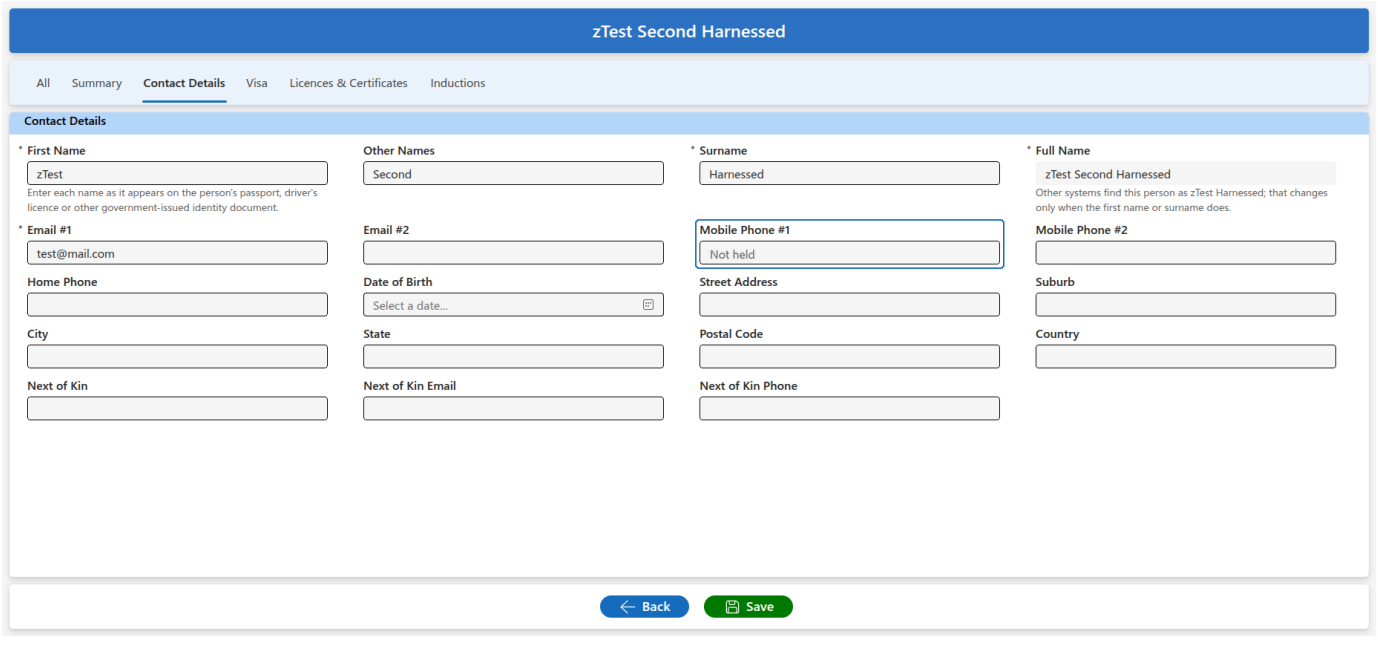
The **Full Name** box cannot be typed. It shows the person's full name as on their identity document, including any other names. But the name the system **stores**, and uses to find the person on the field forms, in emails, in reports and in registers, is the **first name and surname only**. It is made for you when you add a person, and again if you change the first name or surname. Changing Other Names on its own leaves it alone, and a line under the box says so: "Other systems find this person as ...".

Other Names shows in this app, not on the field forms. A nickname in the first name or surname would show everywhere and would stop matching Terra Search's own copy of the person.

Emails and phones

- An email must look like name@example.com.
- A phone number can be an Australian mobile or landline, or an international number starting with +.
- If one is wrong, the app says "Check the marked emails or phone numbers before saving" and saves nothing.
- Optional email and phone fields can be left blank.

Mobile numbers that are not held



Some crews work under their own employer's safety system, and that employer may prefer not to record their mobile

numbers with us. You no longer need to enter a placeholder or made-up number for them.

- **New option available:** anyone who can open **Settings** for the profile can now turn on the **Mobile numbers not held** setting.
- **Updating staff:** once it is on, you can leave a staff member's mobile number as **Not held**, or enter a real number if one is provided.
- **Existing placeholders:** please don't update or clear the placeholder numbers already in the system. Our automated text messaging is still being updated to handle blank numbers safely, and removing placeholders now may cause messaging errors. We will let you know as soon as it is safe to clean them up.

For a safety profile marked "Mobile numbers not held" on the Settings screen, the **Mobile Phone #1** box is not required. It shows **Not held** while it is empty, with a note: "This profile's people have no mobile number on file: leave it blank, or enter one if the person has it." You can then save the person with no mobile number. A number you do enter is still checked. For every other profile the mobile number is required and checked.

Contractors and notifications

Compliance Notifications controls whether the person receives compliance reminders. It can be turned off only for a person marked **Contractor**. For anyone else the switch is greyed and on. It is useful for people such as offsiders and drillers, who you add so that they can be picked on a field form but who should not receive reminders.

Adding a person here does **not** put them on a compliance list, and sends nothing. A person joins a project's compliance list when a form that adds people names them. See Staff compliance. The database decides only who can be added: the person needs a record on the project's safety profile and, for most forms, **Compliance Notifications** switched on.

Leaving

Back with unsaved changes asks "Do you want to save changes?": **Discard**, **Save**, or **Close** to stay.

Retiring or deleting a person

To retire a person, set **Current** to NO rather than deleting. Delete only a true duplicate, and only the copy that no compliance record points to. The Databases screen refuses to delete a person whose compliance records still exist and says what to do instead: see Databases. If you are unsure, ask Terra Search.

Your records are your own. Each record belongs to one safety profile and the app shows only your profile's records, so editing yours changes none of Terra Search's. Terra Search keeps its own copy of each person it employs or supplies, for its HR forms.

Related pages

- Databases
- Staff compliance
- Known behaviours in the beta

22. Projects database record

Updated: 21/10/2026 11:40 AWST
App version 1.0.0.21

A project record holds a project's client, site, nearby emergency services, the default compliance requirements for its people and equipment, and who receives its forms. Reach it from **Databases**, **Projects** tab: choose **New**, or tick one row and choose **Edit**.

Add or change a project

1. Use the tabs to move between sections: **Summary**, **Roads**, **Work Site**, **Accommodation**, **Medical**, **Hospital**, **Police**, **Airfield**, **Default Compliance** and **Form Deliverables**. **All** shows every section.
2. On **Summary**, fill in the required fields: **Project Name**, **Client**, **Time zone**, **Compliance Hour** and **Check-In Hour**. The time zone field is labelled with the three-letter abbreviation of Greenwich Mean Time and takes a whole-hour offset. A new project starts with an offset of 8, compliance hour 7 and check-in hour 19. The client must already be in the Clients database.
3. Enter the work site's **coordinates** as latitude, longitude, like -31.96301, 115.90432.
4. Phone numbers for the accommodation, medical clinic, hospital, police and airfield accept Australian mobiles and landlines and the business numbers 13, 1300 and 1800, for example 08 9123 4567, 0412 345 678, 13 12 34 or 1300 123 456. International numbers are not accepted here. If a number is not in a form the app takes, it says "Check the marked coordinates or phone numbers before saving."
5. Choose **Save**. **Save** stays greyed until you change something.

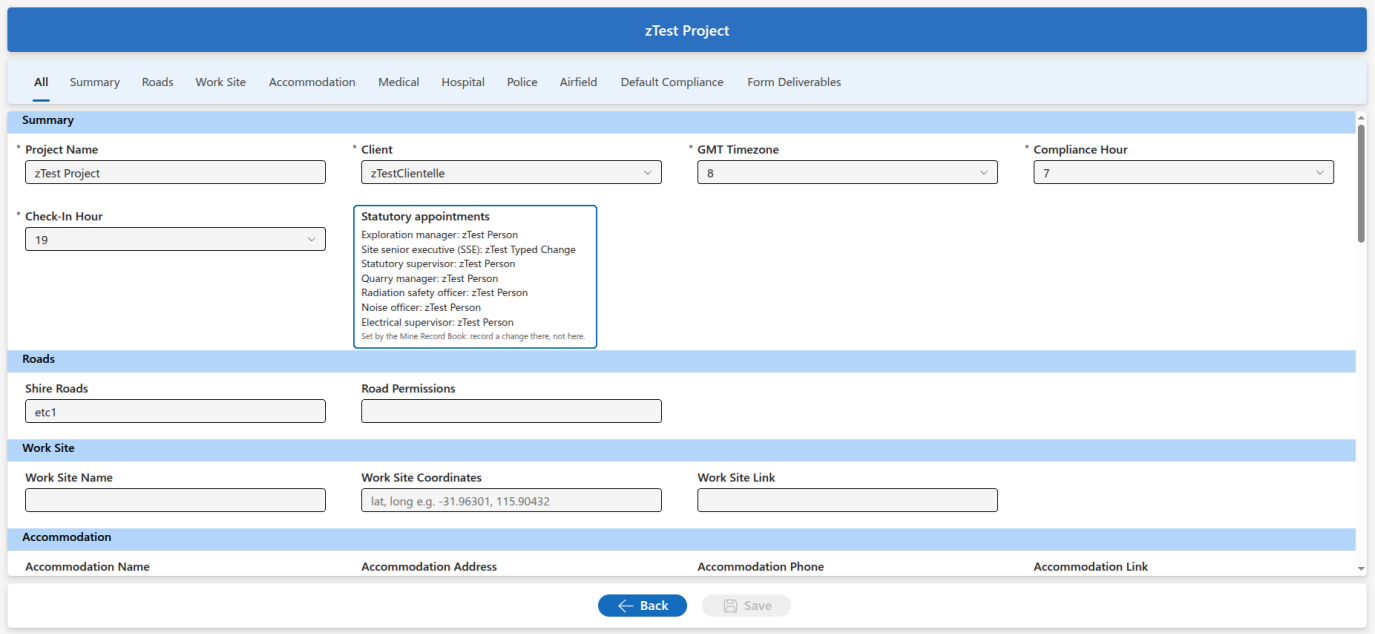
Default compliance

Staff Trigger Forms and **Equipment Trigger Forms** choose which submitted forms add a person or equipment to the project's compliance registers. The requirements beneath them are what each then owes. They are copied into new compliance records only, so changing them later does not alter records that already exist. A **Safety Briefing** adds the people and equipment it names whatever the trigger forms are. A project can tick "Quad Bike Inspection", but no form has that name: quad bikes and side-by-sides use the UTV Inspection. For which forms add whom, see Staff compliance and Equipment compliance.

Form deliverables

Send All Forms here can only add to the same switch on Settings: on, every form from this project is sent; off, the Settings switch still decides which forms are sent. The recipient lists choose who receives each kind of form, in addition to the Settings distribution lists.

Statutory appointments



The **Statutory appointments** panel is read-only. It lists the appointments recorded in the Mine Record Book. To change

one, record a change there; see Mine Record Book appointments.

Good to know

- A multi-select list cannot be emptied here: if you remove every item, the old list is kept.

Related pages

- Databases
- Settings
- Mine Record Book

23. Clients database record

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

A client record is a small form: a name, a status and any files. Reach it from **Databases**, **Clients** tab: choose **New**, or tick one row and choose **Edit**.

Add or change a client

1. Type the **Client Name**.
2. Choose the **Status**, "Active" or "Inactive". It is required.
3. Add up to 10 files under **Attachments** if you need to.
4. Choose **Save**. **Save** stays greyed until you change something. If something required is missing the app says "Fill out all required fields".

To stop using a client without deleting it, set its **Status** to "Inactive". **Back** with unsaved changes asks "Do you want to save changes?".

Related pages

- Databases
- Projects database

24. Equipment database record

Updated: 29/10/2026 12:40 AWST
App version 1.0.0.21

An equipment record holds one asset: a vehicle, generator, trailer or similar. Reach it from **Databases**, **Equipment** tab: choose **New**, or tick one row and choose **Edit**.

Add or change equipment

1. Type the **Equipment** name and choose the **Equipment Type**. Both are required.
2. Under **Odometer & Service**, enter the current reading (hours for a generator), the **Next Service** reading and, if you have it, the **Next Service (Date)**. **Remaining** is worked out for you: a whole number, such as **7,920**, in the asset's own units (kilometres for a vehicle, hours for a generator), amber with **due soon** when fewer than 500 remain or the service date is within 14 days, and red with **overdue** when the service reading is reached or its date has passed. It is blank while no next service is recorded.
3. Under **Fire Extinguisher**, enter the tag date and net mass.
4. Switch **Active** off when the equipment is no longer used.
5. Choose **Save**. **Save** stays greyed until you change something, a change of **Equipment Type** included.

Last Inspection and **Inspector** are filled in by the inspection forms and cannot be typed here.

Defects and work orders

An existing item's record has a **Defects** panel beside it (below it on a tablet or a phone): every fault its inspections reported, open or rectified, with the report behind each and a **Work order** for your fitter. The panel is described on Equipment defects and work orders.

Good to know

- Quad Bike and Vehicle are not offered for new equipment. An existing item that already has one of them keeps it.
- On Databases, the **Attention Required** filter shows equipment due for service or whose extinguisher tag is more than 180 days old, and the **Open defects** column beside each asset's name shows its open faults.

Related pages

- Equipment defects and work orders
- Databases
- Equipment compliance

25. Comms database record

Updated: 14/10/2026 11:22 AWST
App version 1.0.0.21

A comms record holds one communications device. Reach it from **Databases**, **Comms** tab: choose **New**, or tick one row and choose **Edit**.

Add or change a device

1. Choose the **Comms Type**. It is required.
2. Type the **Comms Name**.
3. For a GPS tracker, **Track** and **Webhook** appear. Fill them in only for a device that sends tracking.
4. Switch **Active** off when the device is no longer used.
5. Add up to 10 files under **Attachments** if you need to.
6. Choose **Save**. **Save** stays greyed until you change something.

Back with unsaved changes asks "Do you want to save changes?".

Related pages

- Databases
- Comms compliance

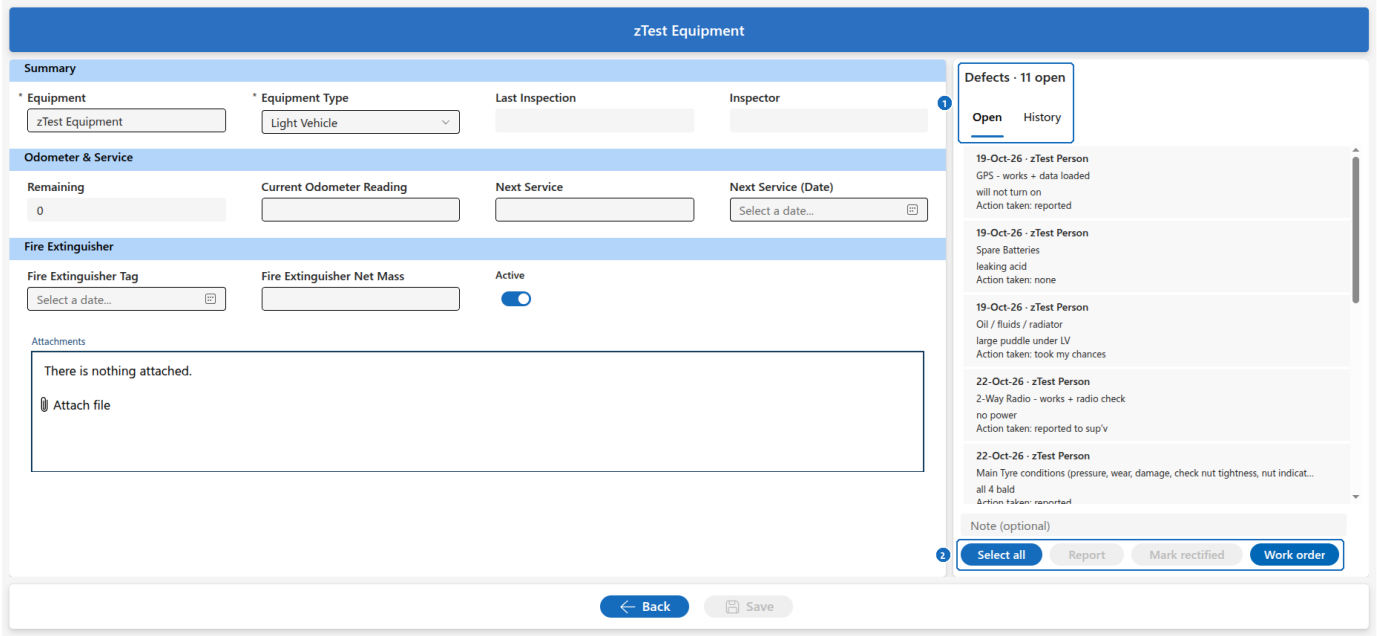
26. Equipment defects and work orders

Updated: 29/10/2026 12:40 AWST
App version 1.0.0.21

Every fault reported on an equipment inspection form is collected against the piece of equipment it was reported on, and stays open until someone marks it rectified. Each faulty item is its own defect, in the words the crew typed, with the action they took and a **severity category** that follows how far the fault contravenes the mining regulations. From release 1.0.0.20 a fault reported again and again on one asset shows as **one card** with how many times and over what period it was reported. A work order gathers the open faults for your fitter as one PDF, each listed once, with the inspection reports behind them beside it.

Where to find them

Open **Databases**, choose the **Equipment** tab, tick an item and choose **Edit**. The record opens with a **Defects** panel beside it on a computer, and below it on a tablet or a phone. The panel's title counts the open defects.



Open and History

- **Open** lists the faults still to fix, Category A first, then the latest report first. Each card names the item (**Tyres**, **2-way radio**, **Brake fluid**), the fault in the words the crew typed last and the action they took, and a **category chip** at the top right. A fault reported once shows the date, who reported it and the inspection it was found on. A fault reported more than once on the asset, by anyone and on any inspection, is **one card**: its line reads **Reported 4 times, 5 Oct to 24 Oct 2026 · latest by** the last reporter, its chip the highest category any report gave it, and a **4 reports** □ button opens the reports one card each, with □ **All defects** to come back. Where the crew typed nothing, the card says to see the inspection's report.
- **History** lists the defects marked rectified, latest first, with when, by whom, the note made at the time, and when the fault was first reported. It also keeps the earlier one-card-per-inspection records, marked **Replaced by its item rows**, from before 1.0.0.16 split them item by item.

A new defect appears within a few minutes of the inspection being submitted. Faults reported before the release, back to July 2026, were brought in as open, one per inspection, and then split into their items with the words and category each item had on its report.

The severity categories

The chip says how severely the fault contravenes the mining regulations. The categories are Terra Search's own, set by the owner on 29 October 2026; the scale is the WHS Act's two notices, and each item's default was derived from the Work Health and Safety (Mines) Regulations 2022 (WA) for the western profile and Queensland's Mining and Quarrying Safety and Health Regulation 2017 for the eastern, the stricter governing. This page is guidance, not legal advice.

Chip	Category	Rule	What to do
A (red)	Category A - do not operate	The fault removes a control the regulations require to be provided, maintained and used before powered mobile plant may operate, or the means of calling for help that remote or isolated work requires, or could let the plant overturn, catch fire, lose control, part from what it tows or hit someone: brakes and brake fluid; steering and suspension; tyres, wheel nuts and rims; ROPS, roll bars, overhead guard, seat belts and frame; fuel, oil, hydraulic, coolant and gas leaks, LPG, exhaust obstruction, an engine that smokes or sparks; exposed wiring; towing pins, hitch, chains and trailer brakes; forks, mast and hydraulic hoses; transmission and throttle; emergency stops; guards on a running generator; **the two-way radio, satellite phone and emergency tracker**.	Do not operate. Tag it out and report it to the supervisor at once; the fitter clears it before it is used again.
B (amber)	Fix before next use, or by a stated time	A required safety feature or maintenance item whose fault does not stop the plant being used safely today: lights, horn, reversing alarm, beacon, fire extinguisher, first aid and snake kits, GPS and navigation, mirrors, windscreen and wipers, fluid levels, battery, filters, dash warning lights, gauges, isolator, spare wheel, jack and brace.	Use with care; fix before the next use or by the time the supervisor states, within 7 days or before the next campaign departure.
C (blue)	Monitor	Housekeeping and cosmetic items no regulation names: cleanliness, weed and seed, stowage, manuals and decals, fuel and water levels, air conditioning, protectors and antennas.	Note it; fix at the next service or clean-down.
– (grey)	Not yet rated	A record from before the categories, or one the app could not read item by item.	Set its category from the card.

The regulations behind Category A. Brakes, steering, lights and the other safety features of mobile plant: WHS (Mines) Regulations 2022 (WA) r. 631(2)(g) and r. 214, the risks of overturning, collision and pressurised fluids; the operator protective devices, ROPS, seat belts and guards: r. 215(2) and r. 208; communications: r. 48(2), which makes effective communication part of the system of work for remote or isolated work, and r. 43's emergency plan, so a dead two-way radio, satellite phone or tracker is Category A; plant not in use left safe: r. 207. In Queensland, s 100 (plant fit for use, with

its protective devices and a backup for its brakes), s 106 (plant shown unfit for use is not operated), s 109(3) (plant that cannot be maintained is taken out of service) and s 96(2) (supervision includes communication). Category B rests on r. 212, r. 213 and r. 215(5) (warning devices, maintenance and inspection), r. 42 (first aid) and Queensland's s 101 and s 108; Category C on the maintenance content of the mine safety management system, r. 622 and r. 624.

Each item has a default category from its inspection form, which anyone on the profile may change on the card. The **Filter** under the tabs shows one category, or only the cards not yet rated.

Set a defect's category

Tap the cards to choose them, open **Set category…** beside the note and choose **Set A**, **Set B** or **Set C**. The chips change, and each report records who changed it, when and from what; on a combined card every report in it changes. Nothing is deleted.

Choose a defect and open its report

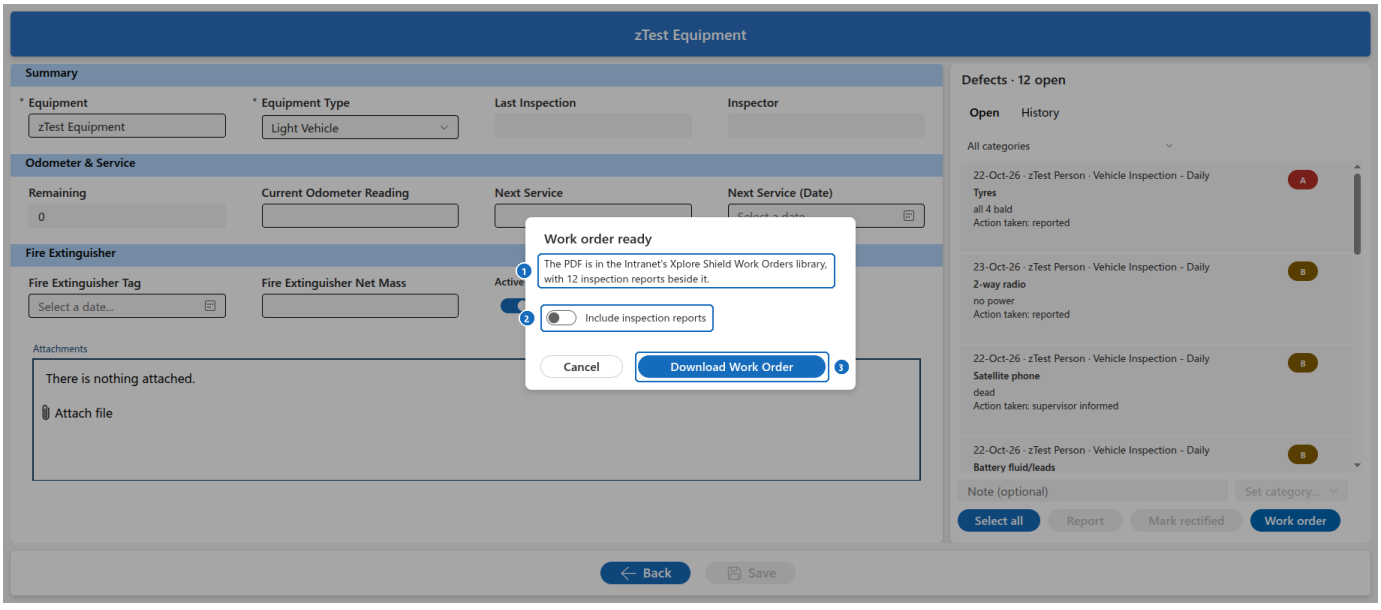
Tap a card to choose it; a tick shows on it, and a combined card's choice takes every report in it. **Select all** chooses every card shown, and reads **Clear** when they all are. With one report chosen, **Report** downloads that inspection's full report, photos included; for a combined card, open its reports with **N reports** □ and choose the one you want.

Mark defects rectified

Choose the defects that have been fixed, type a note if you like, and choose **Mark rectified**. They move to **History** with your name, the time and the note; a combined card's every report moves. Nothing is deleted: a defect is open or rectified.

A work order for your fitter

1. Choose **Work order**. While the bundle is made a shade covers the screen and a card says **Preparing the work order…**, with a note that many open defects take a minute or two; its **Cancel** leaves the work order unmade: nothing is listed on an order and no defect takes a reference.
2. When it is ready, a **Work order ready** panel says how many inspection reports were bundled, with **Cancel** and **Download Work Order**:
   - **Download Work Order** saves the work order PDF: A4, the equipment's details, the open faults by category then latest report, each listed once with how many times and over what period it was reported and the numbers of its reports in the bundle, with a **Fixed** box and a **Fitter's notes** column each, and a sign-off for the fitter and the supervisor. Defects not ticked as fixed stay open for the next work order.
   - Switch on **Include inspection reports** first and the order's folder opens as well, in the Intranet's **Xplore Shield Work Orders** library: **Work order <reference> <equipment> <date and time>**, which holds the PDF and each item's inspection report, named **Report 1**, **Report 2** and so on in the work order's order. The library's own **Download** there gives the whole folder as one zip.
   - **Cancel** closes the panel; the PDF and its folder stay in the library.
3. Each defect listed takes the order's reference, so the next work order shows which were already on one. **Work order** is back on the panel as soon as the ready panel closes.



Good to know

- The work order is made on the app's own connection: nothing is written to your OneDrive, and the app asks for no OneDrive connection. Each order's folder in the **Xplore Shield Work Orders** library opens for you and the Intranet's owners alone, and stays there until it is removed.
- **Report** opens one inspection's report, so it works with exactly one card chosen; the bundle brings every report at once.
- The work order lists each item's category in a **Cat.** column beside its words.
- Hired or placeholder equipment ("(Rental/Other)") has no record of its own, so its inspections' faults do not show here yet.
- A short tour from the **What's new** notice walks these steps; **Help** on the Equipment database record opens the Equipment database page, which links here.

Related pages

- Equipment database
- Databases
- Dashboard, where **What's new** shows

27. MSMS screen

Updated: 02/11/2026 10:12 AWST
App version 1.0.0.21

MSMS is the library of safety management system documents. Open it from **MSMS** in the menu.

Two libraries

- **Generic MSMS** is the shared library. You can browse, preview and download it, but not change it.
- **Client MSMS** holds the files of your own safety profile. Here you can also upload, create folders and delete.

Browse and read

1. Choose a tab. Folders are listed first, then files.
2. Choose a folder to open it. The path across the top shows where you are; choose a part of it to go back.
3. Choose a PDF, Word, Excel or PowerPoint file to preview it. The preview fills the screen, as a form's does on the Registers screen, with **Close** and **Download** at the top (at the foot on a phone). On a computer, hold Ctrl and turn the mouse wheel to zoom. While a PDF loads the preview says so. If it cannot load, it says "The preview could not be loaded. Open the file with the download icon instead."
4. **Download**, in the preview or on the file's row, opens the file in your browser.

Upload and organise (Client MSMS)

Uploading, creating folders and previewing PDFs all work in the beta. Folders and files are made in your organisation's folder of the MSMS library under your own account, so you need access to that folder: if the app says it failed, see FAQ.

- **Upload Files**: choose up to 10 files and **Upload**. They go into the folder you have open. The app names any file that failed.
- **Create Folder**: type a name and choose **Accept**. The folder is made inside the folder you have open. Any character a folder name cannot hold, such as / : * ? " < > | or \, becomes a hyphen.
- **Delete**: choose **Delete** on a row and confirm. The deletion is permanent.

Good to know

- Client MSMS shows up to about 2,000 files. Past that the app warns that not all files are shown: delete files you no longer need.
- Reloading after an upload can take a few seconds.

Related pages

- Databases
- Frequently asked questions

28. Notifications: the bell, For you and the daily digest

Updated: 28/10/2026 16:00 AWST
App version 1.0.0.21

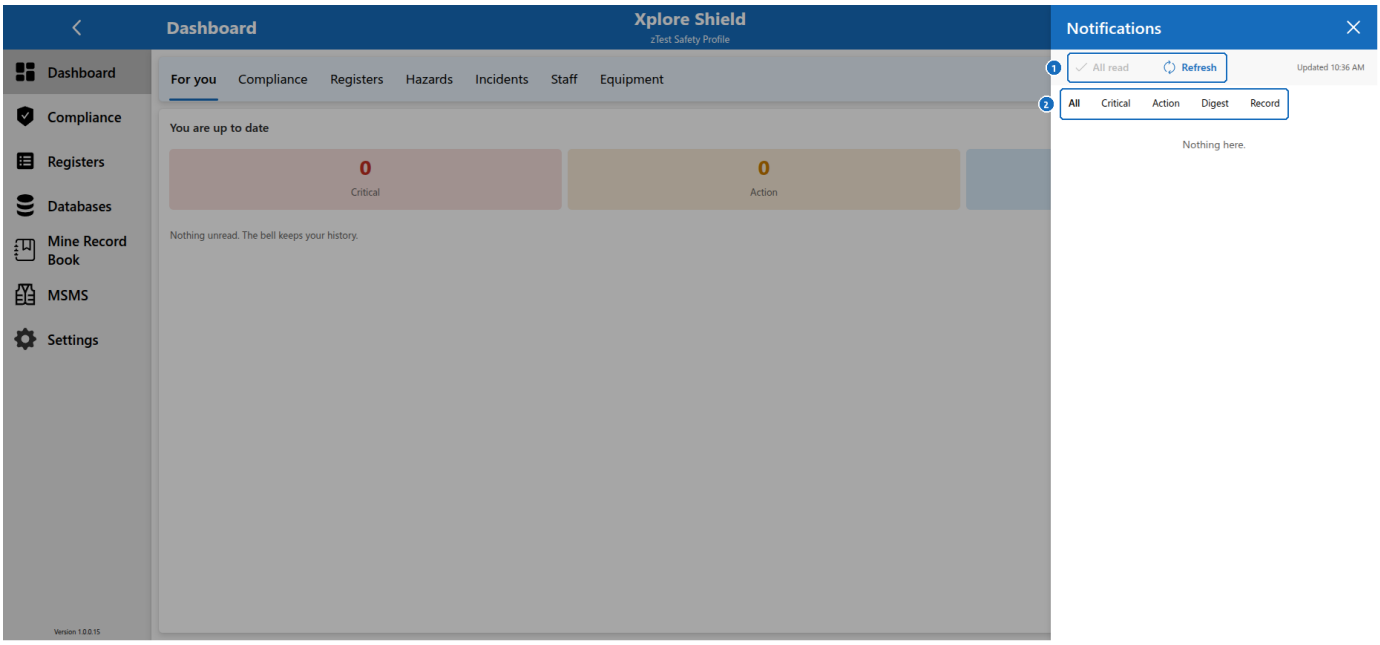
From release 1.0.0.15, what the app wants you to know arrives in one place: a bell in the blue bar at the top of every main screen, a panel of your notices behind it, and a **For you** view the Dashboard opens on. In place of one email for every item added to a compliance list, one daily digest email gathers the day's additions for each safety profile you look after.

The bell

The bell counts your unread notices and fills in while there is one. Tap it on any screen and the panel opens on the right, over the Dashboard; on a phone it takes the whole screen. The count leaves out **Record** notices, which are kept for your history and never need an answer.

The panel

The panel lists your notices, newest first. Each shows its class, the safety profile it belongs to, when it was raised, a title and a line or two of words.

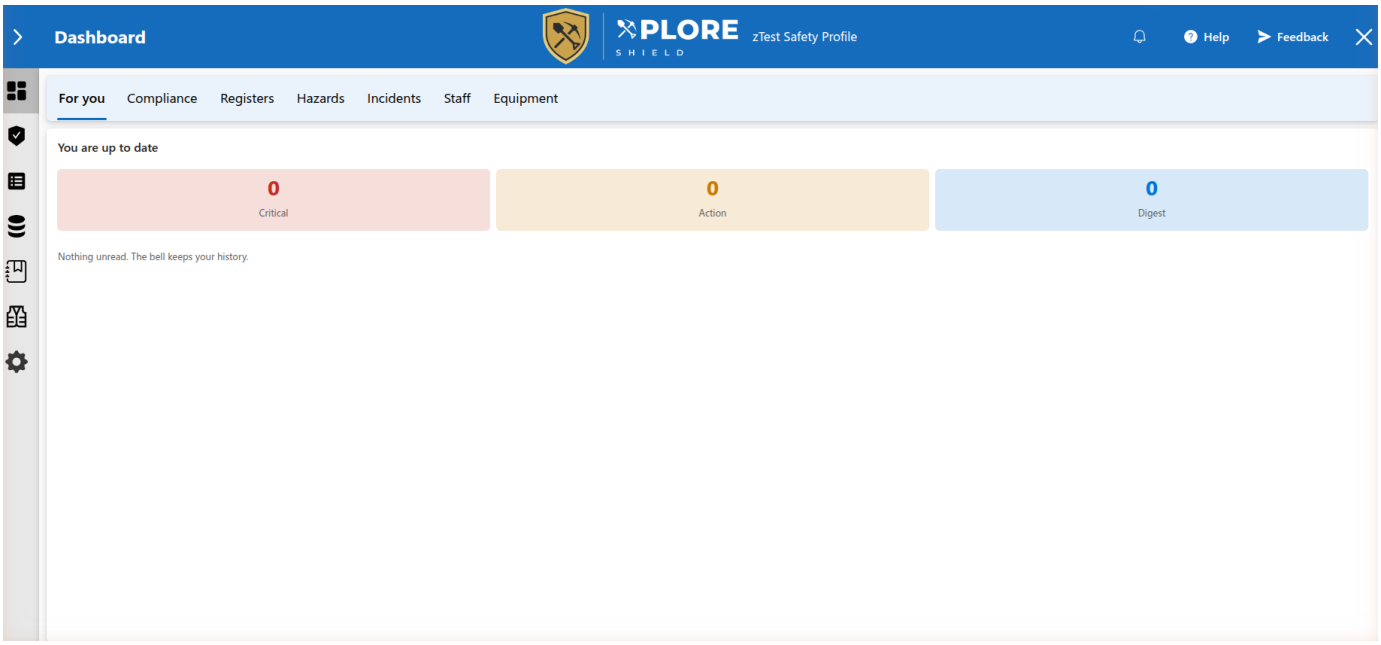


- **Open** marks the notice read and takes you to the item: a person or a piece of equipment on a compliance list opens in its record, or on the Compliance screen's list for that profile.
- **Dismiss** (the cross) hides the notice. It is kept for ninety days behind the scenes, and nothing else changes.
- **All read** marks every unread notice read and clears the count. **Refresh** reads your notices again; the time of the last read sits beside it.
- The row of tabs narrows the list to one class. **All** shows everything.
- A tap outside the panel, or the cross at its top, closes it.

Your notices are yours across every safety profile that lists you. Switching profile in the menu does not change the list; the profile named on each notice tells you which it belongs to.

For you on the Dashboard

The Dashboard now opens on a **For you** tab, before Compliance. It shows how much is unread, three tiles counting your **Critical**, **Action** and **Digest** notices (a tap on a tile opens the panel), and your unread notices newest first, each opening its item when tapped. If you can switch safety profile, a line beneath them gives today's additions to the profile's staff and equipment compliance lists and how many items need attention across the other tabs. The other tabs are as they were: the general counts, the attention list and the charts.



The four classes

Class	Colour	What it means	How it reaches you
Critical	Red	Something that cannot wait	The bell, a push notification, an email and a text message at once; the bell keeps it until you clear it
Action	Amber	Something for you to do	The bell and a push notification; an email only if it is still unread after a while
Digest	Blue	Something to know about today, such as a person or a piece of equipment added to a compliance list	The bell, and one daily digest email per safety profile
Record	Grey	Something kept for the record, such as a setting the system could not act on	The history behind the bell only; never counted

In this release the hub raises **Digest** and **Record** notices for additions to the Staff and Equipment Compliance lists. The other classes are ready for the notices later releases will raise.

The daily digest email

Once a day at 5:00 am Perth time, the people on a profile's **Compliance Reports** list (on Settings) get one email from **Xplore Shield** (xplore-shield@terrasearch.com.au) with the day's additions to that profile's compliance lists, grouped by profile, in place of one email per addition. A digest is sent only when there is something in it. Each digest ends with a line asking you to add the sender to your safe senders, so it never lands in junk; please do that once.

During the beta

While the hub is being proved, the digest and the bell are switched on for people one profile at a time, and the existing "was added to the Staff (or Equipment) Compliance list" emails keep coming until the switch-over. If your bell says notifications are not switched on for you yet, that is why; nothing is missing. The FAQ says what the system sends today and who gets it.

Good to know

- The time on a notice is shown in your device's own time zone.
- The bell reads your notices when you open the app, when you tap it and when you choose **Refresh**; it does not poll in the background.

- A notice is addressed to the email your record in the Staff database holds. If you sign in to the app with a different address, the bell has nothing to show you; tell Terra Search and the record will be put right.
- Nothing you read, dismiss or mark read is deleted; the hub keeps every notice for ninety days.

Related pages

- Dashboard: the For you tab and the other tabs.
- Settings: the **Compliance Reports** list, which decides who gets the digest.
- Frequently asked questions: what the system sends and who gets it.

29. Settings screen

Updated: 21/10/2026 11:40 AWST
App version 1.0.0.21

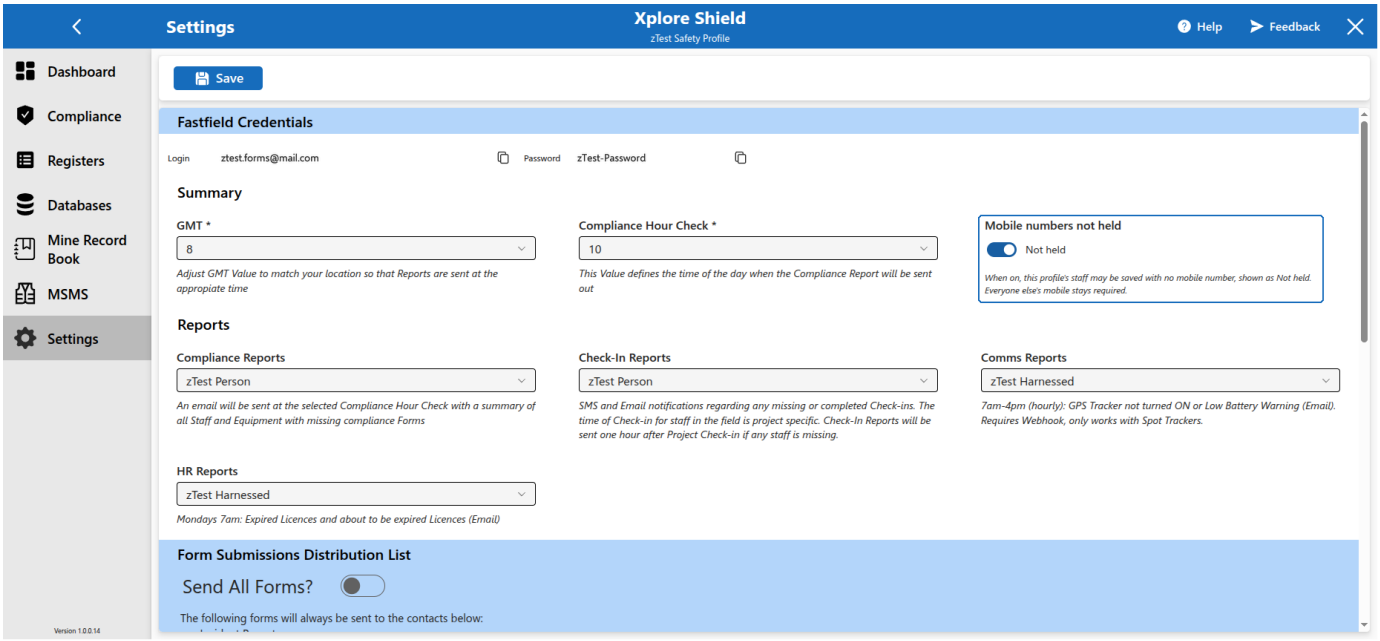
Settings controls who receives Xplore Shield's emails and when. **A change here applies to your whole safety profile**, to everyone on it, so check before you save.

Change a setting

1. Choose **Settings** in the menu. It is the last screen in the menu; the Terra Search staff who can switch safety profile see the profile row beneath it.
2. Change what you need (see below).
3. Choose **Save**. The button opens once a field differs from the saved settings. The app says "Changes saved" and the page reloads with what it saved; a picker left blank keeps its saved value.

The screen is a page of fields: the FastField logins at the top, then the summary, report and form settings, in one column on a phone, two on a tablet held upright and three on a computer; the whole page scrolls as one.

What is on the screen



- **Fastfield Credentials**: the profile's FastField logins, one row each, with the login, its password and a **copy** button beside each. One tap copies it and the app says "Login copied" or "Password copied"; you need not choose the row first. On a phone the login and the password take two lines.
- **Compliance Hour Check**: the hour of the day the Compliance Report is sent.
- **Mobile numbers not held**: on for a profile whose people's mobile numbers are not on file. Its staff can then be saved with no mobile number, shown as **Not held**; everyone else's mobile stays required. Anyone who can open Settings for the profile can turn it on (below). See Staff database record.
- **Reports**: who receives each report, chosen from the profile's current staff.
  - **Compliance Reports**: an email at the Compliance Hour Check summarising all staff and equipment with missing compliance forms. These people also receive an email each time a person or a piece of equipment is added to a compliance list, so taking someone off this list stops those emails and the daily report together.
  - **Check-In Reports**: SMS and email about missing or completed check-ins, sent one hour after a project's check-in time if anyone is missing.
  - **Comms Reports**: hourly, 7am to 4pm, when a GPS tracker is off or low on battery. This only works with Spot trackers.
  - **HR Reports**: Mondays at 7am, licences expired or about to expire.
- **Form distribution lists**: **Safety Form Distribution List**, **Equipment Forms** and **HR Forms**. Choose who receives each group of forms.
- **Time zone**: the field labelled with the three-letter abbreviation of Greenwich Mean Time. Set it to match your location. Reports go out at the Compliance Hour Check read through this value; nothing converts it for you.

- **Send All Forms?**: off, only these forms are always sent: incident reports, hazard reports, job safety analyses, weekly toolbox meetings, daily reports and any form marked "Attention Required". On, every form is sent, whether it needs attention or not. A project's own **Send All Forms** can only add to this switch: on, it sends every form from that project; off, it leaves this switch to decide.

Staff whose mobile number is not recorded

Some crews work under their own employer's safety system, and that employer may prefer not to record their mobile numbers with us. You no longer need to enter a placeholder or made-up number for them.

- **New option available:** anyone who can open **Settings** for the profile can now turn on the **Mobile numbers not held** setting.
- **Updating staff:** once it is on, you can leave a staff member's mobile number as **Not held**, or enter a real number if one is provided.
- **Existing placeholders:** please don't update or clear the placeholder numbers already in the system. Our automated text messaging is still being updated to handle blank numbers safely, and removing placeholders now may cause messaging errors. We will let you know as soon as it is safe to clean them up.

Good to know

- Staff pickers list only people whose record is marked current.
- Leave the screen without saving and your changes are lost.

Related pages

- Projects database
- Compliance
- Quick start