

LOCKOUT **PRO™ 3.0**

User Guide

LOCKOUT-PRO™ Graphical Procedure Writing Software
v3.0 Desktop Version

YOU SHOULD CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS OF THIS LICENSE AGREEMENT BEFORE OPENING THIS PACKAGE. IF YOU DO NOT AGREE WITH THESE TERMS AND CONDITIONS, PLEASE PROMPTLY RETURN THIS PACKAGE FOR A FULL REFUND. LICENSE AGREEMENT

Brady Worldwide, Inc. (hereafter "Brady") hereby grants you a non-exclusive, nontransferable license to use this software and the accompanying documentation according to the following terms:

1. **LICENSE GRANT:** You may 1) install the software on only one computer at a time, and 2) make one (1) copy of the software in machine readable form solely for backup purposes.
2. **LICENSE RESTRICTIONS:** You may not: 1) transmit the software over a network without an additional license; 2) modify, adapt, translate, reverse engineer, decompile, disassemble, create derivative works based on, or copy (except for the backup copy) this software or the accompanying documentation; 3) rent, transfer or grant any rights in the software or accompanying documentation without the prior, express written consent of Brady; or 4) remove any proprietary notices, labels, or marks on the software and accompanying documentation.
3. **NATURE OF THIS AGREEMENT:** This license is not a sale. License fees paid by you, if any, are in consideration of the licenses granted under this Agreement. Title and copyrights to the software, accompanying documentation, and any copy made by you, remain the property of Brady or its suppliers.

Unauthorized copying of the software or the accompanying documentation, or failure to comply with the above restrictions, shall automatically terminate this license, without further notice, and terminate your rights to use the software, and Brady shall, in addition to its other legal remedies, be entitled to its reasonable attorney fees.

4. **LIMITED WARRANTY:** Brady warrants that, for a period of ninety (90) days from the date of delivery to you as evidenced by a copy of your receipt, the software, as furnished, under normal use, will perform without significant errors that make it unusable. Brady's entire liability and your exclusive remedy under this warranty (which is subject to you returning the software to Brady) will be, at the option of Brady, to attempt to correct or help you around errors, to replace the software with functionally equivalent software or diskettes, or to refund the license fee of the software and terminate this Agreement.

EXCEPT FOR THE ABOVE EXPRESS LIMITED WARRANTY, BRADY MAKES AND YOU RECEIVE NO WARRANTIES, EXPRESS, IMPLIED, STATUTORY OR IN ANY COMMUNICATION WITH YOU, AND BRADY SPECIFICALLY DISCLAIMS ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. BRADY DOES NOT WARRANT THAT THE OPERATION OF THE PROGRAM WILL BE UNINTERRUPTED OR ERROR FREE.

Some states do not allow the exclusion of implied warranties so the above exclusions may not apply to you. This warranty gives you specific legal rights. You may also have other rights which vary from state to state.

5. **LIMITATION OF LIABILITY: IN NO EVENT WILL BRADY BE LIABLE FOR ANY DAMAGES, INCLUDING LOSS OF DATA, WHEN LOADING THIS SOFTWARE OR OTHERWISE, OR LOST PROFITS, COST OF COVER OR OTHER SPECIAL, INCIDENTAL, CONSEQUENTIAL OR INDIRECT DAMAGES ARISING FROM THE USE OF THE PROGRAM OR ACCOMPANYING DOCUMENTATION, HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY. THIS LIMITATION WILL APPLY EVEN IF BRADY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.**

Some states do not allow the limitation or exclusion of liability for incidental, or consequential damages, so the above limitation may not apply to you.

6. **GENERAL:** This Agreement shall be governed by, and interpreted under, the laws of the State of Wisconsin, USA. You acknowledge that U.S. law and regulations may restrict the export/re-export of the software. You agree not to export/re-export the software or portions thereof in any form without the appropriate U.S. and foreign government licenses. This obligation shall survive and continue after this Agreement terminates. This Agreement is the entire agreement between the parties and supersedes any other communications or advertising with respect to the software and accompanying documentation. If any provision of this Agreement is held invalid, the remainder of this Agreement shall continue in full force and effect.

6555 West Good Hope Road, P.O. Box 571, Milwaukee, Wisconsin 53201-0571, USA, tlf. +1 (414) 358-6600





CONTENTS

Getting Started 1

- Key Functions of LOCKOUT-PRO 1-1
- Viewer Version of LOCKOUT-PRO 1-3
- System Requirements 1-4
- Installing LOCKOUT-PRO: Standard Version 1-4
- Installing LOCKOUT-PRO: Viewer Version 1-5
- Uninstalling LOCKOUT-PRO 1-6
- Launching LOCKOUT-PRO 1-6
- How to Get Help Using LOCKOUT-PRO 1-6
 - Online Tutorial 1-7
 - Online Help 1-7
 - User Guide 1-8
 - Contacting Technical Support 1-8

Exploring Lockout-PRO 2

- LOCKOUT-PRO & Energy-control Programs 2-1
 - Fast, Simple Procedure Generator 2-2
 - Powerful Tools to Customize Procedures 2-2
 - Information for a Complete Energy-Control Program 2-4
- Getting to Know the Main LOCKOUT-PRO Window 2-4
 - Layout of the Main Window 2-4
 - Main Menu 2-5
 - Primary Options Taskbar 2-8
 - Window Tab Bar 2-8
 - Procedure Sections Panel 2-9
 - Display Area of the Main Window 2-9
 - Text Editing Toolbar 2-10
- How to Use Standard Interaction Features 2-10

Viewing & Printing Procedures 3

- Viewing an Existing Procedure 3-1
- Printing Procedures, Tags & Labels 3-2
 - Options for Printers & Paper Stock 3-2
 - Printing a Procedure 3-3
 - Printing Lockout Tags 3-4
 - Printing Energy Source Labels 3-6
- Saving a Procedure 3-7

Creating/Revising Procedures 4

- Choosing Which Form to Use for a New Procedure 4-1
 - When to Use a Long Form 4-2
 - When to Use a Short Form 4-2
 - When to Use a Combined Form 4-2
 - Comparing the Forms 4-3
- Opening a LOCKOUT-PRO Procedure File 4-4
 - Starting a New Procedure from a Template 4-4
 - Opening an Existing Procedure 4-5
- Long Form: Entering & Modifying Details 4-6
 - Header/Footer Information 4-6
 - General Information 4-7
 - Lockout Steps 4-8
- Short Form: Entering & Modifying Details 4-11
 - Header/Footer Information 4-11
 - Energy Sources 4-12
 - Images 4-15
 - General Information 4-16
- Combined Form: Entering & Modifying Details 4-16
 - Header/Footer Information 4-17
 - Energy Sources 4-18
 - Images 4-21
 - General Information 4-22
 - Lockout Application & Lockout Release Steps 4-22
- Working with images in your procedure 4-25
 - Adding Images to Procedures 4-25
 - Editing Images in Procedures 4-27
 - Using Labels on Images 4-28

Using Related Information 5

- Overview of LOCKOUT-PRO's Related Information 5-1
 - Regulations 5-1
 - Corporate Policy 5-2
 - Employee Training 5-2
 - Device Guide 5-2
- Viewing & Printing Related Information 5-2

Importing/Exporting Procedures 6

- Importing LOCKOUT-PRO Procedures 6-1
 - Format Differences in Earlier Versions 6-2
 - Importing a Single Procedure 6-2
 - Importing Multiple Procedures 6-3
- Exporting Procedures to Other Formats 6-3

Setting Defaults in Lockout PRO 7

- How Defaults Work 7-1
- Accessing System Defaults 7-2
- Setting & Changing Energy Source Defaults 7-3
 - Change Energy Source Identifier Default 7-3
 - Change Energy Source Type Defaults 7-4
 - Energy Source Description Defaults 7-6
- Setting & Changing Basic Data Defaults 7-7

Header “Note” Defaults	7–8
Change Controls & Methods Defaults	7–10
Change Location Defaults	7–11
Change Lockout Device Defaults	7–13
Setting and Changing Lockout Step Defaults: (Combined Form only)	7–14
Change Lockout Step Defaults	7–15
Change Defaults for Energy Source Checks	7–17
Setting & Changing Procedure Defaults	7–18
Changing Section Settings Defaults	7–19

Working with Templates 8

Understanding LOCKOUT-PRO Templates	8–1
Templates vs. Defaults	8–2
Deciding How to Customize Templates	8–2
What Can Be Changed on a Template	8–2
What Cannot Be Changed on a Template	8–3
Illustration of Editable Areas on Templates	8–3
Editing a Procedure Template	8–8

Copyright

This manual is copyrighted with all rights reserved. No portion of this manual may be copied or reproduced by any means without the prior consent of Brady Worldwide, Inc.

While every precaution has been taken in preparation of this document, Brady assumes no liability to any party for any loss or damage caused by errors or omissions or by statements resulting from negligence, accident, or any other cause. Brady further assumes no liability arising out of the application or use of any product or system described, herein; nor any liability for incidental or consequential damages arising from the use of this document. Brady disclaims all warranties of merchantability or fitness for a particular purpose.

Brady reserves the right to make changes without further notice to any product or system herein to improve reliability, function, or design.

Reproduction of this material, in part or whole, is strictly prohibited without the written permission of Brady Worldwide, Inc.. For more information, contact: Brady Worldwide, Inc. Signmark® Division, 2221 W. Camden Road, Milwaukee, WI 53209.

Disclaimer

Every effort has been made to make this guide as accurate and complete as possible. Brady Worldwide, Inc. is not responsible for inaccuracies and omissions occurring during the use of this guide.

This manual is proprietary to Brady Worldwide, Inc. and may be revised from time to time without notice. Brady Worldwide, Inc. disclaims any understanding to provide you with revisions, if any.

All brand or product names referenced in this manual are trademarks or registered trademarks of their respective companies or organizations.

LOCKOUT-PRO, GlobalMark, and HandiMark are trademarks of Brady Worldwide, Inc.

© 2006 Brady Worldwide, Inc. All rights reserved.
www.bradycorp.com

GETTING STARTED



Welcome to LOCKOUT-PRO™ Graphical Procedure Writing Software from Brady Corporation!

LOCKOUT-PRO™ provides all the tools you need to create an effective, compliant energy-control program with easy-to-follow standardized procedures. Lockout tags and labels can be printed for each energy source and are cross-referenced to the procedure, making lockout activities virtually foolproof.

This chapter of the *User Guide* includes the following:

- An overview of LOCKOUT-PRO™'s primary functions
- System requirements for installing LOCKOUT-PRO™
- How to install LOCKOUT-PRO™ — both the *Standard Version* and the *Viewer Version*, which allows you to view and print procedures, but not create or change them
- How to launch LOCKOUT-PRO™ after installation
- How to get help using LOCKOUT-PRO™

Key Functions of LOCKOUT-PRO

With LOCKOUT-PRO™, you can perform the following key functions, all of which are explained in detail in this *User Guide*:

Use simple, powerful templates to create OSHA-compliant lockout/tagout procedures. LOCKOUT-PRO™ includes three different types of procedure layouts to accommodate the varying needs of different types of procedures. For any given procedure, you determine whether a Long Form, Short Form, or Combined Form template is best. (See “*Choosing Which Form to Use for a New Procedure*” on page 4-1 for details.)

Create procedures in minutes using built-in defaults. LOCKOUT-PRO™ Graphical Procedure Writing Software comes with an extensive database of standard lockout procedural terminology that allows you to simply click your choices from lists and have them formatted and placed in the right places on the procedure. This ensures the accuracy of your procedures and makes them fast and easy to create. (See Chapter 4, “Creating/Revising Procedures” for details.)

Customize templates and defaults to meet the needs of your organization. Edit any or all of the templates’ text and graphics to your standards. You can change the terminology on the templates that determine the information that always appears on a procedure. You can also add text of your own, which allows you to insert your custom text into procedures with point-and-click efficiency. (See Chapter 7, “Setting Defaults in Lockout PRO” and Chapter 8, “Working with Templates” for details.)

Insert and edit images that clearly illustrate steps of the lockout procedure. LOCKOUT-PRO™ allows you to easily add images to your procedures. With its built-in image editing features, you can crop, rotate, adjust brightness and contrast, and even add and precisely place multiple labels onto images to make them easy for employees to understand. (See “Working with images in your procedure” on page 4-25 for details.)

Print procedures, lockout tags, and energy labels on your choice of printer. LOCKOUT-PRO™ does the work of pulling relevant information from a particular procedure to print onto the lockout tags and energy labels associated with it. You can use any standard sheet-fed inkjet or laser printer, or you can simplify the printing process even more by using the special templates for printing with Brady Corporation’s GlobalMark or HandiMark printers. (See “Printing Procedures, Tags & Labels” on page 3-2 for details.)

Make procedures readily available to all employees who need them. The free LOCKOUT-PRO™ Viewer that comes packaged with the software can be installed on any PC to give your employees quick access to viewing and printing procedures, tags, and energy labels. (See “Viewing & Printing Procedures” on page 3-1 for details.)

Revise procedures on schedule. Use LOCKOUT-PRO™’s automatic time- and date-stamping of procedures to stay on top of revisions schedules.

For detailed information on viewing and printing procedures and secondary materials, see *Chapter 3, "Viewing & Printing Procedures"*. For information on viewing and printing related information, see *Chapter 5, "Using Related Information"*.

System Requirements

SYSTEM REQUIREMENTS FOR LOCKOUT-PRO™ Graphical Procedure Writing Software

Requirement:	Minimum:	Recommended:
Processor	1.2 GHz or better	Same
Display Resolution	800x600 or better	1024x768 or higher
Memory (RAM)	512 MB	Same
Disk Space	500 MB	Same
Operating System	Windows 2000/XP	Same
Internet Explorer	v5.0 or higher	v6.0 or newer
.NET framework	v1.1 or higher	Provided on LOCKOUT-PRO™ installation CD for user to install if not already on user's system.
Printer	<p>Drivers for the printer(s) you will use with LOCKOUT-PRO™ should be installed. At least one printer must be installed to run the application. See your printer's documentation for information on installing your printer.</p> <p>GlobalMark™ printers only: Updated driver is required. First, uninstall the printer from your computer. Install the new GlobalMark™ driver included on the LOCKOUT-PRO™ installation CD. (NOTE: This driver has not been tested or validated to work with MarkWare™, Surf on Signs™, or any other Brady software.)</p>	

Installing LOCKOUT-PRO: Standard Version

Installing LOCKOUT-PRO™ is a short, simple process during which the application will be set up on your computer.

NOTE: Before you install LOCKOUT-PRO™ you must first have a copy of Microsoft Internet Explorer 5.01 or newer installed on your system. If not, install a copy of Internet Explorer before continuing. The latest version of Internet Explorer can be downloaded for free or ordered on CD from www.microsoft.com.

- 4 When requested, select the language you want to use in the application.
- 5 When the “Welcome” screen appears, click the choice to install the LOCKOUT-PRO™ Viewer.
- 6 Read and check the option that you agree to the license agreement.
- 7 You will be asked to verify the directory in which LOCKOUT-PRO™ will be installed. It is recommended that you use the default installation directory.

Uninstalling LOCKOUT-PRO

To remove LOCKOUT-PRO from your system:

- 1 From the **Start** menu, select **Settings > Control Panel > Add/Remove Programs**.
- 2 In the **Add/Remove Programs** dialog box select the **Brady Lockout PRO** entry in the list of programs.
- 3 Click the **Add/Remove** button.
- 4 Follow the prompts during the uninstall process.
- 5 Restart your computer if prompted.

Launching LOCKOUT-PRO

Once you’ve installed LOCKOUT-PRO™ (see “Installing LOCKOUT-PRO: Standard Version” on page 1-4), you can launch it by any of the usual Windows program-launching methods:

- Open your PC’s **Start** menu **Programs**, locate the LOCKOUT-PRO™ **3** shortcut, and click on it.
- OR -
- Find the LOCKOUT-PRO™ shortcut on your PC’s desktop, and double-click on it.
- OR -
- From an open folder window displaying LOCKOUT-PRO™ procedures, double-click on a procedure.

How to Get Help Using LOCKOUT-PRO

LOCKOUT-PRO™ provides several ways of learning and getting help with the application.

- Online tutorial

- Online help
- *LOCKOUT-PRO™ DESKTOP User Guide*
- Brady Corporation Technical Support

Online Tutorial

When you first start LOCKOUT-PRO™, a window opens on the right side of the screen containing the Online Tutorial. This tutorial includes:

- A brief overview of the three forms
- Tips for using LOCKOUT-PRO™
- Basic instructions for creating new procedures
- Steps for saving procedures
- Steps for printing procedures, lockout tags, and energy source labels

To navigate through the tutorial:

- 1 Click the **Next**, **Back**, or other prompts at the bottom of each tutorial window to move forward or backward.

To close the tutorial window:

- 1 By default, the tutorial opens whenever you open LOCKOUT-PRO™ Graphical Procedure Writing Software. To close the tutorial window temporarily, click the **Close** button at the bottom of the tutorial window.
- 2 To change the default so the tutorial does not open every time you open LOCKOUT-PRO™, click to uncheck the box by **Show on Startup** at the bottom of the tutorial window.

To open the tutorial window:

- 1 Click the **Help** menu on the LOCKOUT-PRO™ main menu.
- 2 Select the **Show Tutorial** option. The tutorial will open on the right side of the main LOCKOUT-PRO™ window.

Online Help

The online help within LOCKOUT-PRO™ offers detailed information about every aspect of the application.

To access online help:

- 1 Click the **Help** menu item on the LOCKOUT-PRO™ main menu.
- 2 Click **Help Topics** from the submenu.

- 3 The online help will open to the table of contents and first page. Click the item on the table of contents that you want to view.
- 4 To close online help, click the **X** in the top right corner of its window.

User Guide

This *User Guide* is installed onto your computer when you install the LOCKOUT-PRO™ application. You can view the *User Guide* by opening it on your computer, and you can also print any or all pages of the guide.

To view the *User Guide*:

- 1 Open **My Computer** and browse to the folder where LOCKOUT-PRO™ was installed. The default location is in **C:\Program Files\Brady**.
- 2 Open the **Lockout PRO** folder.
- 3 Open the folder titled **Documentation**.
- 4 Locate the **LOPuserguide.pdf** file and double-click to open it.

NOTE: You will need to have the free Adobe Acrobat Reader installed on your computer to open the user guide.

To print the *User Guide*:

- 1 With the *User Guide* open, click the **File>Print** menu in the *User Guide's* window.
- 2 Choose the options for printing.
- 3 Click the **Print** button.

Contacting Technical Support

Technical Support Numbers

United States and other C/S countries

Tel: 800-368-3362
Fax: 414-228-5799
Email: technical_support@bradycorp.com

Canada

Tel: 888-262-7576
Fax: 905-764-5557
Email: techsupportcanada@bradycorp.com

Mexico

Tel: 800-368-3362

Fax: 525-527-5586

Email: bradymexico@bradycorp.com

Brazil

Tel (PABX): 55 11 3686-4720

Tel (Direct): 55 11 3686-5697

Fax: 55 11 3686-5236

Email: brady_sevice_brazil@bradycorp.com

Fast, Simple Procedure Generator

LOCKOUT-PRO™ Graphical Procedure Writing Software does much of the work of writing your procedures, using:

- **Color-coded, graphical formats** that ensure procedures are easy to understand and apply
- A **database** of graphics, terms, methods, controls, steps, and other energy-source information important to include on procedures
- Three **templated forms** to handle virtually any size procedure
- A clear and thorough process that **prompts you** through all elements of an effective lockout/tagout procedure
- **Lockout-tag and energy-label formats** that pull information directly from the procedure for fast and easy printing of supplemental or related materials to use in your energy-control program
- A **built-in image editor** that makes the application self-contained

When it's time to write a procedure, you:

- Make selections specific to the identity and location of the equipment and energy sources involved.
- Optionally select images to insert, and add any additional notes, if desired.
- Print the procedure, fully laid out and incorporating your selections and notes.
- Print lockout tags and energy labels, which pull their data from the procedure just created.

NOTE: For details on how to write procedures in LOCKOUT-PRO™, see Chapter 4, “Creating/Revising Procedures”.

Powerful Tools to Customize Procedures

Behind the simplicity of LOCKOUT-PRO™'s procedure-writing capability lies a robust database engine with many easy-to-customize features to meet the specific needs of your organization.

You can customize for a specific procedure, as well as for all procedures by changing the database of system defaults and by editing the templates.

For a specific procedure, you can use these customization options to:

- Replace default text with text you input.
- Change the formatting of text — for example, to emphasize a warning statement.
- Insert, edit, title, and label photos and other graphics showing the specific equipment and energy sources.
- Add your own special notes to the procedure.

For all procedures, you can customize the default data in the following ways:

- Add to the extensive built-in lists of data from which you select as you create procedures. Among the default lists you can add to are:
 - Energy source types
 - Secondary descriptions of energy sources
 - Options for notes to print on procedure headers
 - Controls, and methods of applying and checking them
 - Terms for identifying locations
 - Lockout devices
 - Lockout application and lockout release steps
- Change the description of any item on the default lists.
- Delete any item from the default lists.
- Change the format for the date and time stamps.
- Change the icons used to indicate type of energy sources.
- Choose the way graphic indicators of energy sources are displayed (icon or abbreviation).

NOTE: For details on customizing defaults, see Chapter 7, “Setting Defaults in Lockout PRO”.

Procedure templates can also be edited to:

- Change the text titles and labels that appear automatically on a procedure.
- Use different logo graphics.
- Change the wording of the text that appears by default on each procedure.
- Change the formatting (font, size, color, emphasis, etc.) of any of the titles, labels, or other text elements that appear by default on each procedure.

NOTE: For details on editing procedure templates, see Chapter 8, “Working with Templates”.



Information for a Complete Energy-Control Program

LOCKOUT-PRO™ Graphical Procedure Writing Software includes more than just the lockout/tagout procedures. It provides tools and related information to help you with your overall energy-control plan.

Ways in which LOCKOUT-PRO™ supports your overall energy-control program include:

- Automatic dating of new procedures and revisions for use in a procedure-review program
- Ability to export procedures in other formats so they can be used with systems such as CMMS, ERP, and other document management systems
- Direct access to OSHA standards for lockout/tagout procedures
- A sample corporate lockout/tagout policy following OSHA guidelines, which you can edit to fit your organization
- Recommended employee training program and materials
- Training videos on how to use lockout devices manufactured by Brady Corporation

NOTE: For more information on these additional tools, see Chapter 5, “Using Related Information”.

Getting to Know the Main LOCKOUT-PRO Window

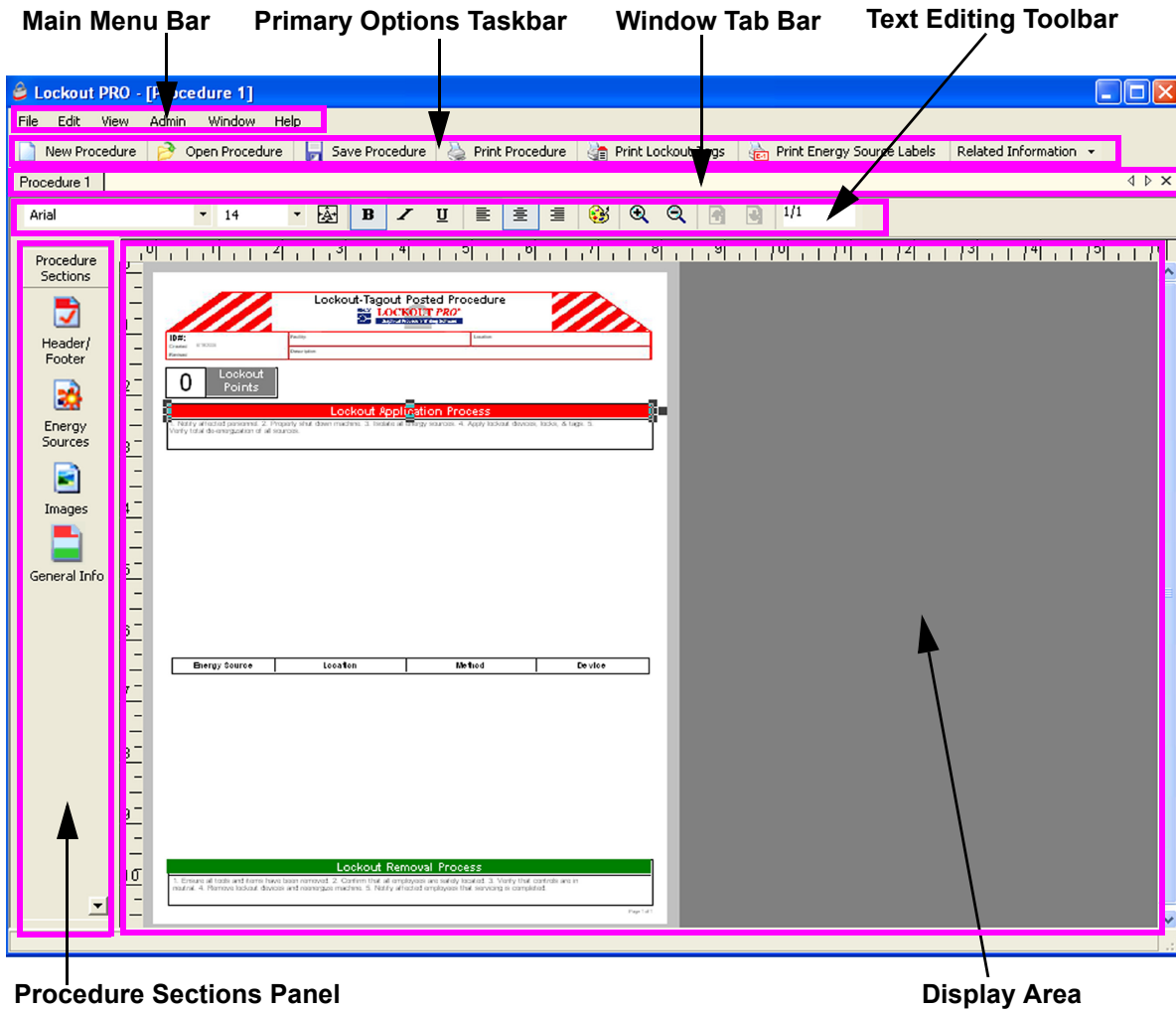
LOCKOUT-PRO™ opens in a window that provides access to all of the functions and options within the application. Becoming familiar with this window will help you get up to speed quickly in LOCKOUT-PRO™.

Layout of the Main Window

The main window is designed for speed and ease of use. Take a look at the illustration of the main LOCKOUT-PRO™ window below. For illustration purposes, the major divisions of the window are highlighted by boxes, and labeled as follows:

- Main Menu Bar
- Primary Options Taskbar
- Window Tab Bar
- Procedure Sections Panel
- Display Area
- Text Editing Toolbar

In the pages that follow, each area of the main window, as well as its purpose and features are described in more detail.



Example of main application window of LOCKOUT-PRO™ DESKTOP v3.0

Main Menu

The LOCKOUT-PRO™ Graphical Procedure Writing Software Main Menu consists of six items displayed across the top of the window: **File**, **Edit**, **View**, **Admin**, **Window**, and **Help**.

To open any menu, simply click on the menu name (e.g., **File**), and the items on that menu will appear in a drop-down list.

If any item has a submenu, you will see a right arrowhead displayed next to the name. Click on the item to see its submenu.

The following chart shows each menu and submenu, and the primary function of all menu options.

MAIN MENU ITEMS AND THEIR FUNCTIONS

FILE Menu Items:	Primary Function:
New	Start creating a new procedure
Open	Open an existing procedure
Save	Save the active procedure
Save As	Save the active procedure under a different name
Print Lockout Tags	Print lockout tags related to the active procedure
Print Energy Labels	Print energy labels related to the active procedure
Import > Convert v1.x Files Convert v2.x Files Procedure File (v1x & v2.x)	Convert procedures from earlier versions of LOCKOUT-PRO™ Graphical Procedure Writing Software, either individually or in a batch
Export Procedure > To PDF To Color TIFF To Black & White TIFF To JPEG	Save the active LOCKOUT-PRO™ procedure to one of four other formats to use with other applications (ERP, CMMS, etc.)
(your recently opened files)	Open a recent file (the last four files opened in LOCKOUT-PRO™ are listed)
Close Procedure	Close the active procedure
Exit	Close the LOCKOUT-PRO™ application
EDIT Menu Items:	Primary Function:
Undo	Undo the most recent action taken
Header/Footer	Work with header and footer information for the active procedure
Energy Sources	Work with energy source information for the active procedure (<i>Short and Combined Forms only</i>)
Images	Work with images for the active procedure (<i>Short and Combined Forms only</i>)
General Info	Work with the general information for the active procedure
Lockout Steps	Work with the detailed lockout steps for the active procedure (<i>Long Form only</i>)
Lockout Application Steps	Work with the lockout application steps for the active procedure (<i>Combined Form only</i>)
Lockout Release Steps	Work with the lockout release steps for the active procedure (<i>Combined Form only</i>)







VIEW Menu Items:	Primary Function:
Regulations	Access OSHA regulations that apply to your energy-control program
Corporate Policy	View an editable template for a corporate lockout/tagout policy
Employee Training	View employee training materials
Device Guide	View text and video guides to lockout/tagout devices offered by Brady Corporation
Language >	Change the language used by LOCKOUT-PRO™ Graphical Procedure Writing Software (a list of available languages displays)
ADMIN Menu Items:	Primary Function:
Edit Templates	Modify the template for any of the three forms: Long, Short, or Combined
Set Defaults	Add, delete, or modify any of the default data and graphical collections available for creating or revising procedures, and modify the source of related information
WINDOW Menu Items:	Primary function:
Maximize	Enlarge the LOCKOUT-PRO™ window so it fills the screen
Minimize	Reduce the LOCKOUT-PRO™ window to a tab at the bottom on the screen
Normal	Display the LOCKOUT-PRO™ window at its default size
HELP Menu Items:	Primary function:
Help Topics	Access help on how to use LOCKOUT-PRO™
Show Tutorial	Toggle the tutorial panel on
About LOCKOUT-PRO™	View version information for LOCKOUT-PRO™



Primary Options Taskbar

Directly under the Main Menu Bar is the **Primary Options Taskbar**. The taskbar provides quick access to the most frequently used functions in LOCKOUT-PRO™ Graphical Procedure Writing Software. Instead of using menus to locate these options, you can simply click on the function you want.

PRIMARY OPTIONS AND THEIR FUNCTIONS

Primary Option:	Function:
 New Procedure	Click to begin creating a new procedure
 Open Procedure	Click to open an existing procedure
 Save Procedure	Click to save the active procedure
 Print Procedure	Click to print the active procedure
 Print Lockout Tags	Click to open the lockout tag print window for the active procedure
 Print Energy Source Labels	Click to open the energy source labels print window for the active procedure
Related Information ▾	Click the drop-down arrow and select an option to open related information

Window Tab Bar

Directly beneath the row of Primary Options is the **Window Tab Bar**. This feature allows you to open multiple procedures and documents, and easily switch back and forth between them.

Here's how the Window Tab Bar works:

- **Each time you create or open a procedure**, a tab for that procedure is displayed in the tab bar. If you leave that procedure open and then open another, a second tab will appear.
- **If you open one of the related information documents** (regulations, policy, etc.), a tab is also added for that.
- **To display the procedure or document associated with a tab, simply click on that tab.** The tab for the active window is highlighted, and its label appears in bolder type. The labels on the other, inactive tabs are grayed-out.

- **If you have opened more procedure and information windows than there is space to display their tabs**, you can click the right and left arrows on the right side of the tab bar to scroll to the additional tabs.
- **To close a procedure or document window without exiting** from LOCKOUT-PRO™ Graphical Procedure Writing Software, simply click the tab to display that procedure or document, and then click the **X** on the far right of the tab bar. If you are closing a procedure that has not been saved, LOCKOUT-PRO™ will prompt you to save it first.



TIP: *When you have more than one procedure open, remember that whatever you do to a procedure affects the active one. Be sure you've clicked the tab of the procedure you wish to work with before performing a function.*

Procedure Sections Panel

The **Procedure Sections** panel appears on the left side of the main LOCKOUT-PRO™ window whenever a procedure is displayed. This panel displays clickable icons and the names for each main section of the type of procedure.

The Procedure Sections icons are form-specific. Thus, each form (Long, Short, and Combined) have different sections displayed here. The functions represented here are also found on the Main Menu. However, these icons provide single-click shortcuts to each section's editing window where you enter or revise the information for that section.



TIP: *When creating a new procedure, you can use the Procedure Sections Panel icons as an outline of all the information you will need to include in the procedure. Many users access the sections in the order shown in the panel, thus ensuring they enter all the necessary information.*

Display Area of the Main Window

This large rectangle on the main window is the primary viewing and working area of LOCKOUT-PRO™.

- **When you work with procedures**, the image of the procedure is displayed here.
- **As you make changes to a procedure**, each time you add or modify information, your changes are reflected in the procedure's image.

- **When you view one of the Related Information documents**, that document will be displayed in this area.
- **When a procedure or document exceeds the size of the display area**, vertical and/or horizontal scroll bars will appear for ease of moving around in the document.

Text Editing Toolbar

When you are creating or revising a procedure, the display area also includes a ruler and a **Text Editing Toolbar**, as shown in the example.

This toolbar includes:

- Functions to change the formatting of text in the procedure
- Magnification controls that let you zoom in and zoom out on the procedure
- Arrows that let you display additional pages when a procedure is longer than one page

How to Use Standard Interaction Features

LOCKOUT-PRO™ Graphical Procedure Writing Software uses the same interaction and navigation conventions that Microsoft Windows uses. If you have worked with other Windows-based software, you will find the same type of operations in LOCKOUT-PRO™. Below is a quick reference to the more common interaction functions.

Options with arrows (>) and ellipses (. . .)

When a menu item includes a right-arrow (>) or an ellipsis (...), or when you see an ellipsis on a button, this indicates that you have additional choices, as follows:

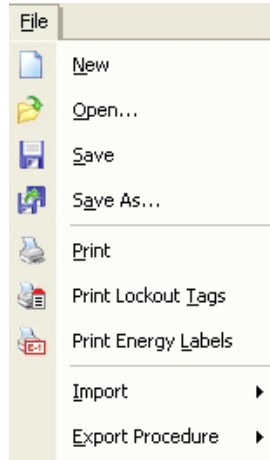
- An arrowhead on a menu item means that item has a submenu from which you can select additional options.
- An ellipsis (...) on either a menu item or a button indicates that a window will open allowing you to make further choices or add information before continuing.

For example, the **File** menu contains options with both arrows and ellipses.

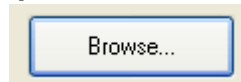
- As the following example shows, **Import** and **Export Procedure** have submenus, allowing you to choose the type of file to import or export to.

- On the same menu, the options for **Open...** and **Save As...** contain ellipses, meaning that when you click on them, another window will open in which you will further refine your choice.

Example of menu with arrows and ellipses



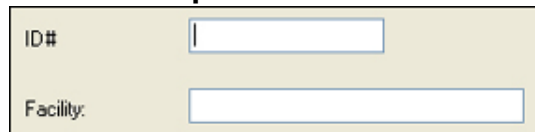
Example of button with ellipsis



Text boxes for entering information:

- Text boxes, or fields as they are often called, are typically displayed to the right of their labels.
- To enter information, move your cursor into the box and click once to activate it. Then type in your information using the keyboard.

Example of text boxes:



Radio buttons:

- Radio buttons are the small circles next to options. They are used when you have two or more options to select from, and you can only choose one.
- To make a choice among radio-button options, move your cursor to the circle in front of the option you want, and then click once with your mouse. A dot will appear inside the circle to confirm your choice.

Standards Used in This Guide:

This user guide supplies step-by-step instructions for performing functions in LOCKOUT-PRO™ Graphical Procedure Writing Software. Terms and formatting used in this guide are defined below.

- When directed to **click** something in LOCKOUT-PRO™, quickly depress the left-side button of the mouse once, and then release it.
- When directed to **double-click**, depress the left mouse button twice in rapid succession.
- When directed to **drag**, depress and hold the left mouse button down, then move your cursor without releasing the mouse button until you have finished the move.
- To help distinguish between LOCKOUT-PRO™'s elements and the instructions for using those elements, this guide uses a different font style when naming the element. Some examples:
 - Click the **File** menu to open it.
 - Click the **Save** button.
 - The **Label Image** window will open.

The bold type used for the words **File**, **Save**, and **Label Image** lets you know that you will find LOCKOUT-PRO™ elements of the same name displayed on your screen or in a menu.

VIEWING & PRINTING PROCEDURES




This chapter includes step-by-step instructions for performing the following functions in LOCKOUT-PRO™ Graphical Procedure Writing Software:

- View existing lockout/tagout procedures in LOCKOUT-PRO™, both Standard and Viewer Version.
- Print a lockout procedure, both Standard and Viewer Version.
- Print lockout tags and energy labels for a procedure, both Standard and Viewer Version.
- Save procedures in LOCKOUT-PRO™ Standard Version.

Viewing an Existing Procedure

The following steps are for **both the Standard and Viewer Versions** of LOCKOUT-PRO™ Desktop.

To open and view an existing procedure:

- 1 From the main LOCKOUT-PRO™ window, click the  **Open Procedure** tab on the primary options toolbar.

- OR -



From the main menu, select **File>Open...**

- 2 When the **Open** window appears, click the name of the file you wish to open, then click the **Open** button.

- OR -

Double-click the name of the file in the window.

NOTE: If the procedure you wish to open does not appear on the list, click the drop-down arrow at the right of the **Look in** box, and then browse to the folder containing the procedure file you want.

- 3 When opened, the procedure appears in the window's display area, scaled to fit the display space. Several options on the text-editing toolbar are available while viewing procedures:
 -  **Zoom controls:** You can increase or decrease magnification of the document image by clicking the zoom-in (plus sign) and zoom-out (minus sign) buttons just above the image.
 -  **Moving between pages:** When a procedure is longer than one page, icons on the text-editing toolbar allow you to move from page to page. To move ahead a page, click the down-arrow icon. To move back a page, click the up-arrow icon.
 - **Scrolling on a single page:** If the image is enlarged such that it no longer fits in the window on your screen, scroll bars will appear on the right side and/or bottom so you can scroll to view the rest of the image.

Printing Procedures, Tags & Labels

You can print a procedure from either the Standard Version or Viewer Version of LOCKOUT-PRO™ Graphical Procedure Writing Software. The following steps are for **both the Standard and Viewer Versions**.

LOCKOUT-PRO™ lets you easily print not just the lockout/tagout procedure, but also the secondary materials associated with the procedure: lockout tags and energy source labels.

In addition, you can print these materials on both plain paper and specially designed label stock using either standard sheet-fed printers or Brady's specialty printers, GlobalMark and HandiMark.

Options for Printers & Paper Stock

Printing procedures: You can use most standard sheet-fed inkjet or laser printers to print procedures on either plain paper or on Brady Sign & Label Blanks made of durable polyester with permanent, pressure-sensitive adhesive backing for easy posting at lockout sites.

You can also use Brady's GlobalMark printer and any of its industrial-grade, heavy-duty tapes to print procedures specially formatted for the 4-inch tape rolls that can be easily applied at equipment lockout sites.

Printing lockout tags: Lockout tags can also be printed on either sheet-fed or GlobalMark printers using any of several sizes of Brady label or tag stock designed for use on and near machines.


Energy source labels: Energy source labels can be printed on sheet-fed and GlobalMark printers in several sizes, as well as on Brady's HandiMark printer to create 2-by-4-inch labels.

The following table summarizes these printing options by type of printer and also lists the Brady stock number for the various tag and label stock.

	Brady GlobalMark printer	Sheet-fed inkjet or laser printer	Brady HandiMark printer
Procedures	<ul style="list-style-type: none"> • 4" roll GlobalMark tape 	<ul style="list-style-type: none"> • 8 1/2" X 11" plain paper • 7" x 10" labels (Brady stock #12902) 	N/A
Lockout tags	<ul style="list-style-type: none"> • 3" or 4" roll GlobalMark tape - and - • 8" or 16" full-color paneled GlobalMark ribbons 	<ul style="list-style-type: none"> • 2-tag sheet (Brady stock #12772) • 6-tag sheet (Brady stock #12771) • 8-tag sheet (Brady stock #12770) 	N/A
Energy source labels	<ul style="list-style-type: none"> • 3" or 4" roll GlobalMark tape - and - • 8" or 16" full-color paneled GlobalMark ribbons 	<ul style="list-style-type: none"> • 1.75" x 2.5" labels (Brady stock #12834) • 3.5" x 5" labels (Brady stock #12900) 	<ul style="list-style-type: none"> • 2" tape (prints 2x4-inch labels)

Printing a Procedure

To print a procedure:

- 1 With the procedure open in the display area of the main window:
 - Click the  **Print Procedure** button in the primary options taskbar.
 - OR -
 - From the main menu, select **File>Print**.
- 2 When the **Print Procedure** window appears, verify that the printer you want to use is the one listed in the **Printer** box. If not, click the down-arrow and select a different printer.
- 3 On the **Print Procedure** window with the correct printer displayed, make any desired changes to the default options:
 - Print all the pages in the procedure, or enter one or a range of pages.
 - Choose the number of copies to print (default is 1).


- In the **Offsets** section, enter a different number if you want to change the amount of horizontal (**X Offset**) or vertical (**Y Offset**) space between the edge of the paper and where the printing starts.
 - To change any of the printer's properties, click the **Properties...** button to access your printer's options.
- 4 Review the pages in the **Preview** area. If desired:
 - Use the zoom in/out controls to change the magnification.
 - Use the up/down arrows to scroll to other pages in the procedure.
 - 5 When you are finished, click the **Print** button in the lower right corner.

NOTE: If you wish to discard all changes you made and return to the original settings in the **Print Procedure** window, click the **Reset** button.
 - 6 When you are finished printing, click the **Close** button to return to the main window where your procedure is displayed.

Printing Lockout Tags

To print lockout tags:

- 1 With the procedure open in the display area of the main window:

Click the  **Print Lockout Tags** button in the primary options taskbar.

- OR -

From the main menu, select **File>Print Lockout Tags**.
- 2 When the **Print Lockout Tags** window appears, verify that the printer you want to use is the one listed in the **Printer** box. If not, click the down-arrow and select a different printer.
- 3 If you want to change any of your printer's properties, click the **More Settings** button to access your printer's options.

NOTE: Any changes you make in the following steps that affect how the lockout tag will print are reflected in updates to the tag's image in the **Preview** box.
- 4 With the correct printer displayed, make any desired changes to the **Supplies** or **Material** options, depending on your printer:
 - For **GlobalMark** printers:
 - From the drop-down list under **Supplies**, choose the **Tape Width** of the tape roll you're using.
 - For **sheet-fed** printers:
 - From the drop-down list under **Material**, choose the type of tag sheet you're using.

- The **Available Labels** section shows how many tags will print on a sheet, based on the paper stock you chose. It allows you to uncheck boxes if you want to print fewer tags than the sheet contains.
- In the **Offsets** section, enter a different number if you want to change the amount of horizontal (**X Offset**) or vertical (**Y Offset**) space between the edge of the paper and where the printing starts.

5 In the **Lockout Information** section:

- The **Date Locked Out** and **Time Locked Out** boxes display the current date and time. Use the up and down arrows to change these to a different date and/or time.
- In the **Lockout By** box, type the name of the person authorized to remove the lockout.
- *GlobalMark printers only:* The **Employee Picture** section defaults to **None**. If you wish to add the picture of the person named in the **Lockout By** box, click the radio button next to the empty box, and then click the **Select** button to locate and insert the photo.
- In the **Remarks** box, type in any additional information you wish to print on the tags.
- In the **Expected Completion** box, enter the time when the re-energization process should be finished.

6 Review the lockout tag in the **Preview** area.

- Use the zoom in/out controls to change the magnification.
- Use the up/down arrow controls to scroll if the entire tag does not fit in the window.

NOTE: If you wish to discard all the changes you entered on this window, click the **Reset** button in the lower left corner. The window will refresh and display the default information.

7 When you are ready to print:


Click the **Print** button in the lower right corner.

NOTE: The **Print Lockout Tags** window remains open until you close it, so you can check your printed tags and make any changes to them, or print more, without having to re-take the steps above.

8 When finished, click the **Close** button to return to the main window where your procedure is displayed

Printing Energy Source Labels

To print energy source labels:

- 1 With the procedure open in the display area of the main window:
- 2 Click the  **Print Energy Source Labels** button in the primary options taskbar.

- OR -

From the main menu, select **File>Print Energy Labels**.

- 3 When the **Print Energy Source Labels** window appears, verify that the printer you want to use is the one listed in the **Printer** box. If not, click the down-arrow and select a different printer.
- 4 If you want to change any of your printer's properties, click the **More Settings** button to access your printer's options.

NOTE: Any changes you make in the following steps that affect how the printed energy label will look are reflected in updates to the label's image in the **Preview** box.

- 5 With the correct printer displayed, make any desired changes to the options listed on the left side of the window. These options vary according to the printer you chose.
 - For **GlobalMark** printers:
 - From the drop-down list under **Shape/Size**, select your choice, depending on the type of tape you are using.
 - In the **Print Label** section, select the label(s) to print. Select **All** to print all energy source labels associated with that procedure, or select the specific label (e.g., E-1, C-1, etc.) from the list displayed.
 - For **HandiMark** printers:
 - In the **Print Label** section, select the energy source whose label you wish to print. (You can print only one label at a time with this printer.)
 - For **sheet-fed** printers:
 - From the drop-down list under **Material**, choose the type of label stock you're using.
 - The **Available Labels** section shows how many labels will print on a sheet, based on the paper stock you chose. It allows you to uncheck boxes if you want to print fewer labels than the sheet contains.
 - In the **Print Label** section, select the label(s) to print. Select **All** to print all energy source labels associated with that procedure, or select the specific label (e.g., E-1, C-1, etc.) from the list displayed.
 - In the **Offsets** section, enter a different number if you want to change the amount of horizontal (**X Offset**) or vertical (**Y Offset**) space between the edge of the paper and where the printing starts.

- 6 In the **Layout** section, you can pull from the procedure two additional pieces of data to add to the label, along with its identifier and icon. Click the down-arrow in the text boxes for **Data Field 1** and **Data Field 2** to choose. The options are the same in both fields. You can select from the following data for either field:
 - ID# of the procedure
 - Facility
 - Location
 - Description from the procedure header
 - Energy source description related to the specific energy source
- 7 Review the pages in the **Preview** area. If desired:
 - Use the zoom in/out controls to change the magnification.
 - Use the up/down arrows to view all the labels.

NOTE: If you wish to discard all the changes you entered on this window, click the **Reset** button in the lower left corner. The window will refresh and display the default information.
- 8 When you are ready to print, click the **Print** button in the lower right corner.

NOTE: The **Print Energy Source Labels** window remains open until you close it so you can check your printed labels and make any changes to them, or print more, without having to re-take the steps above.
- 9 When finished, click the **Close** button in the lower right corner of the window to return to the main window where your procedure is displayed.

Saving a Procedure

You can save a new or existing procedure only with the Standard Version of LOCKOUT-PRO™ Graphical Procedure Writing Software.



TIP: *It's a good practice to save a NEW procedure when you first begin entering data into it. This avoids the loss of work in the event of a problem with the computer or its power source. LOCKOUT-PRO™ will also prompt you to save the procedure before you exit.*

To save a procedure:

- 1 Click the  **Save Procedure** button on the primary options taskbar.
- OR -
From the main menu, select **File>Save**.

- 2 If this is an **existing procedure**, the file is now saved.

If this is a **new procedure** that hasn't been previously saved, the standard Windows **Save As** window will appear.

- If this is your first time using LOCKOUT-PRO™ Graphical Procedure Writing Software, the window will display the directory **\My Lockout Procedures**.
- If you have used this installation of LOCKOUT-PRO™ before, the window will display the last-used directory.

In either case, ensure this is the directory you wish to save the procedure to. If it is not, use the Windows browse function to find the directory for saving procedures.

NOTE: After saving one procedure, LOCKOUT-PRO™ will go to the same directory for future saves unless you change the directory.

- 3 Enter the name of the procedure into the **File Name** box.
- 4 Click **Save**. The file is now saved under the name entered.

CREATING/REVISING PROCEDURES



The ability to create and revise procedures is the primary reason for using LOCKOUT-PRO™ Graphical Procedure Writing Software. This chapter provides the step-by-step instructions for generating and effective and professional procedures in LOCKOUT-PRO™, and modifying existing ones. This chapter explains how to:

- Choose which form (Long, Short, or Combined) to use for a new lockout procedure.
- Enter or revise the details of a lockout procedure for all three forms, including header/footer information, energy sources, general and specific lockout steps, and images.
- Insert, modify, and delete images in a procedure.
- Change the text formatting for a procedure.

Choosing Which Form to Use for a New Procedure

Through its templated forms, LOCKOUT-PRO™ saves a lot of time and repetitive work otherwise involved in writing procedures. Because of the variety of procedures, three different template forms are provided. When creating a new lockout/tagout procedure, your first step is to choose which of these forms to use:

- Long Form
- Short Form
- Combined Form

When to Use a Long Form

The **Long Form** is the most flexible of the forms. It can include as many pages as needed to accommodate the images and text required to document the lockout steps.

Consider using a Long Form when:

- You have a procedure that involves many energy sources and images, and requires detailed lockout steps.
- You want to create a comprehensive document with all of the information required for a particular lockout/tagout procedure.
- You want a single document to describe a complete procedure that you can use as a backup reference for shorter procedures that describe the different steps of the overall procedure.

When to Use a Short Form

The **Short Form** is the most compact and concise form. It typically is a single page, though it will expand to as many pages as needed for the information entered. You can insert up to two images in this form.

Consider using a Short Form when:

- You want to document a relatively short procedure that requires only one or two images for clarity.
- You want to summarize the key steps of a longer procedure for posting as a quick reference near the lockout site.
- You want to create separate documents for each segment of a longer procedure that you can post separately at the lockout location.

When to Use a Combined Form

The **Combined Form** is, as its name implies, a combination of features from each of the other two forms. It consists of two different page layouts:

- The **front page**, which is usually the first page, but can extend to additional pages, displays summary information similar to the Short Form, except that the Combined Form can accommodate up to three images on this summary page.
- The **back pages**, which consist of all procedure pages that follow the front page, display the detailed lockout steps similar to the Long Form, but for both lockout application and lockout release steps.

Consider using a Combined Form when:

- You want to create a procedure that gives employees access to BOTH a summary and a detailed version in one place.
- You want to document and illustrate a short procedure on a single page but you need to include more images than the two accommodated by the Short Form layout.
- You want to have in one document both the concise procedure summary and the step-by-step detailed version.

Comparing the Forms

The following table summarizes the differences among the forms:

COMPARISON OF FEATURES OF THREE FORM TYPES

STANDARD FEATURES:	Long Form	Short Form	Combined Form
Length	as many pages as needed	typically 1 page	typically 2 pages
Lockout/tagout procedure ID number	✓	✓	✓
Facility, location, and description of the equipment the procedure applies to	✓	✓	✓
Procedure creation and revision dates	✓	✓	✓
Name of author			✓
Name of revisor			✓
Auditor's name and date of next audit			✓
Number of lockout points involved	✓	✓	✓
General lockout application process	✓	✓	
Energy source types and descriptions	✓	✓	✓
Location of energy sources	✓	✓	✓
Methods to disable energy sources	✓	✓	✓
Lockout devices to use	✓	✓	✓
Steps to check a lockout is enabled			✓
Detailed table of lockout steps	✓		

COMPARISON OF FEATURES OF THREE FORM TYPES (Continued)

STANDARD FEATURES:	Long Form	Short Form	Combined Form
Detailed list of lockout application and release steps with option for images			✓
Summary table of energy sources and their lockout methods		✓	✓
Images	1 per step	up to 2	up to 3 on first page; 1 per step on subsequent pages
General lockout removal process	✓	✓	
Specific lockout release steps			✓
Emergency contact information			✓
Procedure change notification steps			✓
Customizable fields for notes and footer information	✓	✓	✓

Opening a LOCKOUT-PRO Procedure File


If you are creating a new procedure file in LOCKOUT-PRO™ Graphical Procedure Writing Software, you will open a blank template and enter your data.

If you are revising an existing procedure or using another procedure as the basis for creating a new one, you will open an existing procedure and change the data it contains.

Starting a New Procedure from a Template

When you start with a template, you choose which of the three forms to use (Long Form, Short Form, or Combined Form), then save it as a procedure with its own name.

To create a new procedure from a blank template:

- 1 From the main window:
Click the  **New Procedure** button on the primary options taskbar.
- OR -
From the main menu, select **File>New...**
- 2 When the **Select Template** window appears, click the image of the form you wish to use (Combined, Long, or Short).
- 3 Click **OK**. The window will close and a blank form will appear in the main window.




TIP: To minimize the risk of losing any data, you should immediately save this file under its new name, as well as saving it frequently as you work on it.

- 4 Next, you will enter the details of the new procedure. Follow the steps for the specific type of form you're working with:
 - “Long Form: Entering & Modifying Details” on page 4-6
 - “Short Form: Entering & Modifying Details” on page 4-11
 - “Combined Form: Entering & Modifying Details” on page 4-16

Opening an Existing Procedure

You will typically open an existing procedure when you want to revise it or to use it as the basis for a new procedure.

To open an existing procedure:

- 1 From the main window:
Click the  **Open Procedure** button on the primary options taskbar.
- OR -
From the main menu, select **File>Open...**
- 2 When the **Open** window appears:
Click the name of the file you wish to open, then click the **Open** button.
- OR -
Double-click the name of the file. The procedure will appear in the main window.

NOTE: If the procedure you wish to open does not appear on the list, click the drop-down arrow at the right of the **Look in** box, and then browse to the folder containing the procedure file you want.

- 3 Your next step is to modify the procedure. For details on revising the procedure, follow the steps for the type of form you're working with:
 - “Long Form: Entering & Modifying Details” on page 4-6
 - “Short Form: Entering & Modifying Details” on page 4-11
 - “Combined Form: Entering & Modifying Details” on page 4-16

Long Form: Entering & Modifying Details

As the icons in the **Procedure Sections** panel show, a Long Form displays lockout information in three main sections:


- Header/Footer
- General Information
- Lockout Steps

Following are the specific steps for working with each of these sections in LOCKOUT-PRO™ Graphical Procedure Writing Software.

Header/Footer Information

In this section, you can add or modify the content of the header and footer areas of all pages of the procedure.

To enter or modify header/footer information for a Long Form procedure:

- 1 Click on the **Header/Footer** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Header**.
- 2 In the **Identification** section of the **Edit Header/Footer** window, enter or modify information in the following fields:
 - **ID#:** The identification number for this procedure
 - **Facility:** Information that identifies the facility housing the equipment
 - **Location:** Information that identifies the equipment's location within the facility
 - **Description:** Identifying information about the equipment itself — for example, its name, serial number, and/or other feature
- 3 In the **Page Footers** section of the **Edit Header/Footer** window, you can enter or modify:
 - **Page Footer (left):** Any text you wish to appear on the bottom left of every page
 - **Page Footer (center):** Any text you wish to appear on the bottom center of every page

NOTE: LOCKOUT-PRO™ automatically inserts the current and total page numbers in the footer on the bottom right side of the page.
- 4 In the **Note** section of the **Edit Header/Footer** window, you can enter additional information about the equipment. Select one of the three options:

- **None**, if you have no additional information to add.
- **Predefined**, if you are choosing from a list; if so, click the down-arrow in the text box, and then click the text to use.
- **Custom**, if you intend to enter information that is not predefined. Just type the information into the text box, or revise the existing text.

NOTE: The text you select or type in will appear in the “NOTE” section of the procedure header.

- 5 Click **OK** to add the header and footer information to your procedure. The window will close and the procedure in the main window will be updated with the information you added.

NOTE: If you **don’t** want to add the new or modified information to your procedure, click the **Cancel** button instead. Your changes will be discarded.

General Information

“General Info” is the term for the general steps involved in both the lockout process and the lockout removal process. These steps are not specific to an energy source lockout point, but must be taken to ensure the safety of the entire process. Steps in the lockout process appear in the header, while steps of the lockout process appear in the footer.

To add or modify the general information steps for a Long Form procedure:

- 1 Click the **General Info** icon  in the **Procedure Sections** panel.
- OR -

From the main menu, select **Edit>General Info**.

- 2 The **General Information** window that appears will display standard steps for both the application and removal processes. In this window, you may:
 - Use the text already shown in either or both boxes.
 - Modify the text in either or both boxes.
 - Delete the existing text and enter your own.
- 3 When done, click **OK**. The window will close and the procedure in the main window will be updated with the information you added.

NOTE: If you **don’t** want to add the new or modified information to your procedure, click the **Cancel** button. Your changes will be discarded.

Lockout Steps

In the lockout step section, you can:

- Define each energy source to be locked out and describe the specific methods and devices for doing so.
- Add or modify images that illustrate the lockout points or other equipment features relevant to the procedure.
- Add lockout steps in any order, rearrange them, and delete them.

To add lockout steps to a Long Form procedure:

- 1 Click on the **Lockout Steps** icon  in the **Procedure Sections** panel.

- OR -

From the main menu, select **Edit>Lockout Steps**.

- 2 On the **Procedure Steps** window, take either of these actions:
 - If the window displays **only** a **Step #1** tab, and no data appears in its fields, proceed to the next step.
 - If the window displays **tabs for several steps and/or information appears** in the fields for **Step #1**, first click the **Add Procedure Step** button.



TIP: Before you enter new information into a field, be sure to double-check that you are not accidentally overwriting existing data or otherwise making unwanted changes to a procedure.

- 3 Choose the energy type for the step by clicking the down-arrow in the text box under **Energy Type**, and then click your selection from the drop-down list. An icon for that energy source will appear below the name, and text containing its abbreviation will later appear in the **Action** field after you have entered the location.
- 4 Choose the energy source description by clicking the down-arrow in the box under **Description**, and then click the description you want to use. Or, type your own description into the box. The description you've chosen or entered will be added to the energy source box.

NOTE: Some descriptions (such as volts and psi) display “xx” to remind you to enter a specific number. When this occurs, click on the x's, delete them, and type in the actual number.



TIP: The **Lockout Step** section lets you pull together and/or enter specific instructions for the lockout step. You can type your own text into any of the text boxes, and it will appear on the procedure. However, built-in default text can make your work much easier. Simply click the down-arrow in each box to see the options. Click an option and the text will appear in the text box on this window and on the actual procedure.

If these default lists do NOT contain the text or terms you often use, can easily add them. See Chapter 7, “Setting Defaults in Lockout PRO” for details.

- 5 In the **Location** box, choose or type in the location of the energy source on the machine. The location is then added to the text in the **Action** box.
- 6 In the **Control** box, choose or type in the method to use to disconnect the energy source for the step. The control method is then inserted into the text in the **Action** box.
- 7 In the **Device** box, choose or type in the lockout device to use on the energy source for this step. The device type is then added to the **Action** box.
- 8 The **Info** section of this window lets you indicate whether you want additional text or an image (or neither) to appear in the “Info” column of the procedure.
 - To add text, click the **Text** radio button and type in the text in the box available.
 - To use a photo, drawing, or other type of image, click the **Image** radio button and then click the **Select** button to locate and insert your image.
- 9 When you are finished, click **OK**.
- 10 For each additional lockout step in the procedure, click the **Add Procedure Step** button and repeat steps 2-9.
- 11 When you are finished adding lockout steps, click **OK**. You will return to the main window, where the steps you added will appear on the procedure.

NOTE: For specific details on adding, editing, and labeling images, see “Working with images in your procedure” on page 4-25.

NOTE: If you don’t want to add the new steps to your procedure, click the **Cancel** button instead. Your changes will be discarded.

To revise one or more lockout steps on a Long Form:


- 1 Click on the **Lockout Steps** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Lockout Steps**.

The **Procedure Steps** window will appear, with a tab displayed at the top for each of the existing steps.

- 2 Click the tab of the step you wish to revise. The details for that step will be displayed in the **Procedure Steps** window.
- 3 Make your changes to the information on the screen.

- 4 When finished, click **OK**. You will return to the main window, where the changes you made will appear on the procedure.

NOTE: If you **don't** want to add the revisions to your procedure, click the **Cancel** button instead. Your changes will be discarded.

- 5 To rearrange lockout steps on a Long Form:
- 6 Click on the **Lockout Steps** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Lockout Steps**.

The **Procedure Steps** window will appear, with a tab displayed at the top for each of the existing steps, in the order they will appear on the printed procedure.

- 7 Click on the **Arrange Procedure Steps** button.
- 8 When the **Arrange Energy Sources** window appears, click to select the step to move, and then click the **Up** or **Down** button to move it. Repeat the procedure until the steps are in the order you wish.

NOTE: Each step's original number will remain on the list and the tab until you return to the **Procedure Steps** window, where the steps will appear in the new order.

- 9 When finished, click **OK**.
- 10 When you are finished with the **Procedure Steps** window, click **OK**. You will return to the main window, where the changes you made will appear on the procedure.

NOTE: If you **don't** want to use the rearranged order of steps, click the **Cancel** button instead. Your changes will be discarded.

To remove lockout steps from a Long Form:

- 1 Click on the **Lockout Steps** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Lockout Steps**.

The **Procedure Steps** window will appear, with a tab displayed at the top for each of the existing steps.

- 2 Click the tab (**Step #1**, **Step #2**, etc.) for the step you wish to remove.
- 3 When the step appears in the window, click the **Remove Procedure Step** button.
- 4 A dialog box will appear asking if you are sure. Click **Yes** if you want to delete the step, or **No** if you want to keep it.

NOTE: If you answer **Yes**, the step and all of its information will be deleted from the procedure, and the steps that follow it will be renumbered.

- 5 When you are finished with the **Procedure Steps** window, click **OK**. You will return to the main window, where the changes you made will appear on the procedure.

NOTE: If you want to **restore** the step(s) you deleted, click the **Cancel** button instead. Your changes will be discarded.

Short Form: Entering & Modifying Details

As the icons in the **Procedure Sections** panel show, the Show Form involves working with data in four main sections:


- Header/Footer
- Energy Sources
- Images
- General Information

Following are the specific steps for working with each of these sections.

Header/Footer Information

In this section, you can add or modify the content of the header and footer areas of the procedure.

To enter or modify header/footer information for a Short Form procedure:

- 1 Click on the **Header/Footer** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Header**.
- 2 In the **Identification** section of the **Edit Header/Footer** window, enter or modify information in the following fields:
 - **ID#:** The identification number for this procedure
 - **Facility:** Information that identifies the facility housing the equipment
 - **Location:** Information that identifies the equipment's location within the facility
 - **Description:** Identifying information about the equipment itself — for example, its name, serial number, and/or other feature
- 3 In the **Page Footers** section of the **Edit Header/Footer** window, you can enter or modify:

- **Page Footer (left):** Any text you wish to appear on the bottom left of every page
- **Page Footer (center):** Any text you wish to appear on the bottom center of every page

NOTE: LOCKOUT-PRO™ Graphical Procedure Writing Software automatically inserts the current and total page numbers in the footer on the bottom right side of the page.

- 4 In the **Note** section of the **Edit Header/Footer** window, you can enter additional information about the equipment. Select one of the three options:
 - **None**, if you have no additional information to add.
 - **Predefined**, if you are choosing from a list; if so, click the down-arrow in the text box, and then click the text to use.
 - **Custom**, if you intend to enter information that is not predefined. Just type the information into the text box, or revise the existing text.

NOTE: The text you select or type in will appear in the “NOTE” section of the procedure header.

- 5 Click **OK** to add the header and footer information to your procedure. The window will close and the procedure in the main window will be updated with the information you added.

NOTE: If you **don't** want to add the new or modified information to your procedure, click the **Cancel** button instead. Your changes will be discarded.

Energy Sources

In this section, you can define or revise each energy source to be locked out, and identify the methods and devices for doing so. You can also rearrange the order of energy sources and delete energy sources from the procedure.

To add energy sources to a Short Form procedure:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -

From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will open.

- If the **Energy Sources** window displays only the tab **New Source** and all fields are blank, you can proceed to the next step.
- If the window displays **tabs for one or more energy sources**, click the **Add Energy Source** button to open a window without existing data.



TIP: Before you enter new information into a field, be sure to double-check that you are not accidentally overwriting existing data or otherwise making unwanted changes to a procedure.

- 2 Choose the energy type by clicking the down-arrow in the text box under **Energy Type**, and then click your selection from the drop-down list. An icon for that energy source appears below the name, and its label will be added to the **Location** text box when you enter the location.
- 3 Choose the energy source description by clicking the down-arrow in the box under **Description**, and then click the description you want to use. Or, type your own description into the box. The description you've chosen or entered will be added to the energy source box.

NOTE: Some descriptions (such as volts and psi) display “xx” to remind you to enter a specific number. When this occurs, click on the x's, delete them, and type in the actual number.



TIP: The **Lockout Process** section of the **Energy Sources** window lets you pull together and/or enter specific instructions for the lockout step. You can type your own text into any of the text boxes, and it will appear on the procedure. However, built-in default text can make your work much easier. Simply click the down-arrow in each box to see the options. Click an option and the text will appear in the text box on this window and on the actual procedure.

If these default lists do **NOT** contain the text or terms you often use, can easily add them. See Chapter 7, “Setting Defaults in Lockout PRO” for details. In the **Location** box, choose or type in the location of the energy source on the machine.

- 4 In the **Control/Method** box, choose or type in the method to use to disconnect the energy source.
- 5 In the **Device** box, choose or type in the lockout device to use on the energy source.
- 6 To add the next energy source, click the **Add Energy Source** button and repeat steps 2-6 above.
- 7 When finished, click **OK**. You will return to the main window, where the energy sources you added will appear on the procedure.

NOTE: If you don't want to add the energy sources to your procedure, click the **Cancel** button instead. Your changes will be discarded.

To revise one or more energy sources on a Short Form:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will open, with a tab displayed at the top for each of the existing energy sources.

- 2 Click the tab of the energy source you wish to revise. The details for that step will be displayed in the **Energy Sources** window.
- 3 Make your changes to the information on the screen.
- 4 When finished, click **OK**. You will return to the main window, where the revisions you made will appear on the procedure.

NOTE: If you **don't** want to keep the revisions, click the **Cancel** button instead. Your changes will be discarded.

To rearrange energy sources on a Short Form:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will appear, with a tab displayed at the top for each of the existing energy sources, in the order they will appear on the printed procedure.

- 2 Click on the **Arrange Energy Sources** button.
- 3 When the **Arrange Energy Sources** window appears, click to select the step to move, and then click the **Up** or **Down** button to move it. Repeat the procedure until the energy sources are in the order you wish.
- 4 Click **OK** to close the **Arrange Energy Sources** window.
- 5 When finished, click **OK** on **Energy Sources** window. You will return to the main window, where the revisions you made will appear on the procedure.

NOTE: If you **don't** want to keep the revisions, click the **Cancel** button instead. Your changes will be discarded.

To remove an energy source on a Short Form:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will open, with a tab displayed at the top for each of the existing energy sources.

- 2 Click the tab (**E-1**, **H-1**, etc.) for the energy source you wish to remove.
- 3 When the information for the energy source appears in the window, click the **Remove Energy Source** button.
- 4 A dialog box will appear asking if you are sure. Click **Yes** if you want to delete the energy source, or **No** if you want to keep it.

NOTE: If you answer **Yes**, the energy source and all of its related information will be deleted from the procedure.

- 5 When finished, click **OK** on **Energy Sources** window. You will return to the main window, where the revisions you made will appear on the procedure.

NOTE: If you want to **restore** the energy source(s) you deleted, click the **Cancel** button instead. Your changes will be discarded.

Images

In this section, you can add one or two images to the Short Form. They will appear above the table of energy sources. You can also label the images to indicate control points or other features.

To add an image to a Short Form procedure:

- 1 Click on the **Images** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Images**.
- 2 When the **Edit Image** window appears, click the tab at the top (**Image 1** or **Image 2**) for the image you want to add.

NOTE: If no images have been added, the window will default to **Image 1** with no content.

- 3 Click the **Browse...** button to browse to the folder where your images are stored.
- 4 When you locate your image, double-click on it. It will be copied into the **Edit Image** window.

NOTE: To edit and label the image, follow the steps in the procedure below, “Working with images in your procedure” on page 4-25.

- 5 To add another image, click the next image tab and repeat steps 3-4.
- 6 When you are finished, click **OK** to return to the main window.

General Information

“General Info” is the term for the general steps involved in both the lockout process and the lockout removal process. These steps are not specific to an energy source lockout point, but must be taken to ensure the safety of the entire process. Steps in the lockout process appear in the header, while steps of the lockout process appear in the footer.

To add or modify the general information steps for a Short Form procedure:

- 1 Click the **General Info** icon  in the **Procedure Sections** panel.
- OR -

From the main menu, select **Edit>General Info**.

- 2 The **General Information** window that appears will display standard steps for both the application and removal processes. In this window, you may:
 - Use the text already shown in either or both boxes.
 - Modify the text in either or both boxes.
 - Delete the existing text and enter your own.
- 3 When done, click **OK**. The window will close and the procedure in the main window will be updated with the information you added.

NOTE: If you **don't** want to add the new or modified information to your procedure, click the **Cancel** button. Your changes will be discarded.

Combined Form: Entering & Modifying Details

As the icons in the **Procedure Sections** panel show, a Combined Form uses information in six main sections:

- Header/Footer
- Energy Sources
- Images
- General Information
- Lockout Application Steps
- Lockout Release Steps


You can access and complete the first four sections when a Front Page is displayed on your screen. You can access and complete the two lockout-step sections only when a Back Page is displayed. The Header/Footer and General Information sections are accessible at any time.

Following are the specific steps for working with each of the Combined Form's six sections.

Header/Footer Information

In this section, you can enter or change the information that appears in the header and footer areas of the procedure.

To enter or modify header/footer information for a Combined Form procedure:

- 1 Click on the **Header/Footer** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Header**.
- 2 In the **Identification** section of the **Edit Header/Footer** window, enter or modify information in the following fields:
 - **ID#:** The identification number for this procedure
 - **Facility:** Information that identifies the facility housing the equipment
 - **Location:** Information that identifies the equipment's location within the facility
 - **Description:** Identifying information about the equipment itself — for example, its name, serial number, and/or other feature
- 3 In the **Note** section of the **Edit Header/Footer** window, you can enter additional information about the equipment. Select one of the three options:
 - **None**, if you have no additional information to add.
 - **Predefined**, if you are choosing from a list; if so, click the down-arrow in the text box, and then click the text to use.
 - **Custom**, if you intend to enter information that is not predefined. Just type the information into the text box, or revise the existing text.

NOTE: The text you select or type in will appear in the “NOTE” section of the header on the Front Page.
- 4 In the **Page Footers** section of the **Edit Header/Footer** window, you can enter or modify:
 - **Page Footer (left):** Any text you wish to appear on the bottom left of every page
 - **Page Footer (center):** Any text you wish to appear on the bottom center of every page

NOTE: LOCKOUT-PRO™ Graphical Procedure Writing Software automatically inserts the current and total page numbers in the footer on the bottom right side of the page.

- 5 In the **Author** section, the dates are automatically displayed.
 - If you are creating a new procedure, the **Created Date** shows the current date, and the **Next Audit Date** shows the current date plus the audit interval specified in the system's defaults. The **Revised Date** field is blank. Only the **Next Audit Date** can be changed.
 - If you are revising an existing procedure, the **Revised Date** shows the current date. The other dates are those generated when the procedure was created. Only the **Next Audit Date** can be changed.
- 6 In the three name fields — **Created by**, **Revised by**, and **Next Audit by** — you can either type in a name or select one from the drop-down list that displays when you click the down-arrow in the box. If you enter a name not on the list, it will be automatically added to the list for future selection.
- 7 Click **OK** to add the header and footer information to your procedure. The window will close and the procedure in the main window will be updated with the information you added.

NOTE: If you **don't** want to add the new or modified information to your procedure, click the **Cancel** button instead. Your changes will be discarded.

Energy Sources

In this section, you can define or revise each energy source to be locked out, and identify the methods and devices for doing so. You can also rearrange the order of energy sources and delete energy sources from the procedure.

To add energy sources to a Combined Form procedure:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will open.

- If the **Energy Sources** window displays only the tab **New Source** and all fields are blank, you can proceed to the next step.
- If the window displays **tabs for one or more energy sources**, click the **Add Energy Source** button to open a window without existing data.



TIP: Before you enter new information into a field, be sure to double-check that you are not accidentally overwriting existing data or otherwise making unwanted changes to a procedure.

- 2 Choose the energy type by clicking the down-arrow in the text box under **Energy Type**, and then click your selection from the drop-down list. An icon for that energy source appears below the name, and its label will be added to the **Location** text box when you enter a location.
- 3 Choose the energy source description by clicking the down-arrow in the box under **Description**, and then click the description you want to use. Or, type your own description into the box. The description you've chosen or entered will be added to the energy source box above.

NOTE: Some descriptions (such as volts and psi) display “xx” to remind you to enter a specific number. When this occurs, click on the x's, delete them, and type in the actual number.



TIP: *The Lockout Process section of the Energy Sources window lets you pull together and/or enter specific instructions for the lockout step. You can type your own text into any of the text boxes, and it will appear on the procedure. However, built-in default text can make your work much easier. Simply click the down-arrow in each box to see the options. Click an option and the text will appear in the text box on this window and on the actual procedure.*

If these default lists do NOT contain the text or terms you often use, can easily add them. See Chapter 7, “Setting Defaults in Lockout PRO” for details. In the Location box, choose or type in the location of the energy source on the machine.

- 4 In the **Location** box, choose or type in the location of the energy source on the machine.
- 5 In the **Control/Method** box, choose or type in the method to use to disconnect the energy source.
- 6 In the **Device** box, choose or type in the lockout device to use on the energy source.
- 7 In the **Check** box, choose or type in the method for checking to ensure that the energy source is, indeed, locked out.
- 8 To add the next energy source, click the **Add Energy Source** button and repeat steps 2-8 above.
- 9 When finished, click **OK**. You will return to the main window, where the energy sources you added will appear on the procedure.

NOTE: If you **don't** want to add the energy sources to your procedure, click the **Cancel** button instead. Your changes will be discarded.

To revise one or more energy sources on a Combined Form:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will open, with a tab displayed at the top for each of the existing energy sources.

- 2 Click the tab of the energy source you wish to revise. The details for that step will be displayed in the **Energy Sources** window.
- 3 Make your changes to the information on the screen.
- 4 When finished, click **OK**. You will return to the main window, where the revisions you made will appear on the procedure.

NOTE: If you **don't** want to keep the revisions, click the **Cancel** button instead. Your changes will be discarded.

To rearrange energy sources on a Combined Form:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will appear, with a tab displayed at the top for each of the existing energy sources, in the order they will appear on the printed procedure.

- 2 Click on the **Arrange Energy Sources** button.
- 3 When the **Arrange Energy Sources** window appears, click to select the step to move, and then click the **Up** or **Down** button to move it. Repeat the procedure until the energy sources are in the order you wish.
- 4 Click **OK** to close the **Arrange Energy Sources** window.
- 5 When finished, click **OK** on **Energy Sources** window. You will return to the main window, where the revisions you made will appear on the procedure.

NOTE: If you **don't** want to keep the revisions, click the **Cancel** button instead. Your changes will be discarded.

To remove an energy source on a Combined Form:

- 1 Click on the **Energy Sources** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Energy Sources**.

The **Energy Sources** window will open, with a tab displayed at the top for each of the existing energy sources.

- 2 Click the tab (**E-1**, **H-1**, etc.) for the energy source you wish to remove.
- 3 When the information for the energy source appears in the window, click the **Remove Energy Source** button.
- 4 A dialog box will appear asking if you are sure. Click **Yes** if you want to delete the energy source, or **No** if you want to keep it.

NOTE: If you answer **Yes**, the energy source and all of its related information will be deleted from the procedure.

- 5 When finished, click **OK** on **Energy Sources** window. You will return to the main window, where the revisions you made will appear on the procedure.

NOTE: If you want to **restore** the energy source(s) you deleted, click the **Cancel** button instead. Your changes will be discarded.

Images

In this section, you can add up to three images to the Combined Form. They will appear above the table of energy sources. You can add labels to the images to indicate control points or other features.

To add an image to a Combined Form procedure:

- 1 Click on the **Images** icon  in the **Procedure Sections** panel.
- OR -
From the main menu, select **Edit>Images**.
- 2 When the **Edit Image** window appears, click the tab at the top (**Image 1**, **Image 2**, or **Image 3**) for the image you want to add.

NOTE: If no images have been added, the window will default to **Image 1** with no content.

- 3 Click the **Browse...** button to browse to the folder where your images are stored.
- 4 When you locate your image, double-click on it. It will be copied into the **Edit Image** window.

NOTE: To edit and label the image, follow the steps in the procedure below, “Working with images in your procedure” on page 4-25.


- 5 To add another image, click the next image tab and repeat steps 3-4.
- 6 When you are finished, click **OK** to return to the main window.

General Information

The “General Info” for the Combined Form consists of information you can enter to display in these areas of the procedure:

- Emergency contact information, which is displayed at the bottom of the Front Page
- Notes that are displayed on the top of the *first* Back Page of the form
- Procedure change information, which is displayed at the bottom of the *last* Back Page

To add or modify the general information for a Combined Form procedure:

- 1 Click the **General Info** icon  in the **Procedure Sections** panel.
- OR -

From the main menu, select **Edit>General Info**. The **General Information** window will appear.

- 2 In the **Emergency Contact Information** text box, enter or modify the information, which will appear in a box at the bottom of the Front Page.
- 3 In the **Notes** text box, enter or modify the information, which will appear in a box at the top of the first Back Page.
- 4 In the **Procedure Change Notification** text box, enter or modify the information, which will appear in a box at the bottom of the last Back Page.
- 5 When done, click **OK**. The window will close and the procedure in the main window will be updated with the information you added.

NOTE: If you **don't** want to add the new or modified information to your procedure, click the **Cancel** button. Your changes will be discarded.

Lockout Application & Lockout Release Steps

The Combined Form provides a format for listing the specific steps to take in both **applying** the lockout and **releasing** it. The template for this procedure includes default steps for both processes. However, you can add to or modify the default text, select new default text, type in your own text, add steps, delete steps, and rearrange steps.

The process for adding and modifying **both** the Lockout Application Steps and the Lockout Release Steps is the same, with these exceptions:

- You click on **different icons** or menu items for the two types.
- The windows and buttons for each type are **labeled** with their appropriate name (**either “Application” or “Lockout”**).

To add a lockout application OR lockout release step to a Combined Form procedure:

- 1 Click the **Lockout Application Steps** OR **Lockout Release Steps** icon  in the **Procedure Sections** panel.

- OR -

From the main menu, select **Edit>Lockout Application Steps** OR **Lockout Release Steps**.

The **Lockout Application** (or) **Release Steps** window will open with the default steps appearing as tabs across the top. The window will display all the default information for the step whose tab is active.

- 2 Click the **Add Lockout Application** (or) **Release Step** button. A tab with the next higher step number will be added, and the fields in the **Lockout Application** (or) **Release Steps** window will be blank.
- 3 Type the description of the step in the **Step** text box, or choose from a list of default steps by clicking the down-arrow in the text box, and then click the text from the drop-down list.
- 4 In the text box under **Instructions**, enter the detailed instructions for the step.
- 5 The **Additional Info** section of this window lets you indicate whether you want additional text or an image (or neither) to appear in the “Additional Info” column of the step.
 - To add text, click the **Text** radio button and type in the text in the box available.
 - To use a photo, drawing, or other type of image, click the **Image** radio button and then click the **Select** button to locate and insert your image.

NOTE: For specific details on adding, editing, and labeling images, see “Working with images in your procedure” on page 4-25.

- 6 When you are finished, click **OK**.
- 7 For each additional lockout step in the procedure, click the **Add Lockout Application** (or) **Release Step** button and repeat steps 3-6.
- 8 When you are finished adding steps, click **OK**. You will return to the main window, where the steps you added will appear on the procedure.

NOTE: If you don’t want to add the new steps to your procedure, click the **Cancel** button instead. Your changes will be discarded.

To revise a lockout application (OR release) step on a Combined Form:

- 1 Click on the **Lockout Application Steps** OR **Lockout Release Steps** icon  in the **Procedure Sections** panel.

- OR -

From the main menu, select **Edit>Lockout Application Steps** OR **Lockout**

Release Steps.

The **Lockout Application** (or) **Release Steps** window will appear, with a tab displayed at the top for each of the existing steps.

- 2 Click the tab of the step you wish to revise. The details for that step will be displayed in the window.
- 3 Make any changes you wish to the information on the screen, using the details outlined in the procedure above (*“To add a lockout application OR lockout release step to a Combined Form procedure”*).
- 4 When finished, click **OK**. You will return to the main window, where the changes you made will appear on the procedure.

NOTE: If you **don’t** want to add the revisions to your procedure, click the **Cancel** button instead. Your changes will be discarded.

To rearrange lockout application (OR release) steps on a Combined Form:

- 1 Click on the **Lockout Application Steps** OR **Lockout Release Steps** icon  in the **Procedure Sections** panel.

- OR -

From the main menu, select **Edit>Lockout Application Steps** OR **Lockout Release Steps**.

The **Lockout Application** (or) **Release Steps** window will appear, with a tab displayed at the top for each of the existing steps, appearing in the order they will appear on the printed procedure.

- 2 Click on the **Arrange Lockout Application** (or) **Release** **Steps**.
- 3 When the **Arrange Energy Sources** window appears, click to select the step to move, and then click the **Up** or **Down** button to move it. Repeat the procedure until the steps are in the order you wish.

NOTE: Each step’s original number will remain on the list and the tab until you return to the **Arrange Lockout Application** (or) **Release Steps** window, where the steps will appear in their new order.

- 4 When you are finished with the **Arrange Energy Sources** window, click **OK**. You will return to the main window, where the changes you made will appear on the procedure.

NOTE: If you **don’t** want to use the rearranged order of steps, click the **Cancel** button instead. Your changes will be discarded.

To remove a lockout application (OR release) step from a Combined Form:

- 1 Click on the **Lockout Application Steps** OR **Lockout Release Steps** icon  in the **Procedure Sections** pane.

- OR -

From the main menu, select **Edit>Lockout Application Steps** OR **Lockout Release Steps**.

The **Lockout Application** (or) **Release Steps** window will appear, with a tab displayed at the top for each of the existing steps, appearing in the order they will appear on the printed procedure.

- 2 Click the tab (**Step #1**, **Step #2**, etc.) for the step you wish to remove.
- 3 When the information for that step appears in the window, click the **Remove Lockout Application** (or) **Release Step** button.
- 4 A dialog box will appear asking if you are sure. Click **Yes** if you want to delete the step, or **No** if you want to keep it.

NOTE: If you answer **Yes**, the step and all of its information will be deleted from the procedure, and the steps that follow it will be renumbered.

- 5 When you are finished with the **Lockout Application** (or) **Release Steps** window, click **OK**. You will return to the main window, where the changes you made will appear on the procedure.

NOTE: If you want to **restore** the step(s) you deleted, click the **Cancel** button instead. Your changes will be discarded.

Working with images in your procedure

All three forms in LOCKOUT-PRO™ Graphical Procedure Writing Software allow you to insert photos, drawings, or other images that help illustrate the steps in the procedure. Although the location and number of images varies according to the form, the procedure for inserting and editing an image is the same for all forms.

Adding Images to Procedures


You can insert any image with one of these file types into a procedure:

- Bitmap (file type extension: **.bmp**)
- TIFF (file type extension: **.tif**)
- JPEG (file type extension: **.jpg**)
- Portable Network Graphics (file type extension: **.png**)


To add an image to a procedure, or to replace an existing image:

- 1 With your procedure open and displayed in the main window, access the **Edit Image** window according to the type of procedure you're working with.

For a Short Form or the front page of a Combined Form:

- Click on the **Energy Sources** icon  in the **Procedure Sections** panel,
- OR -
From the main menu, select **Edit>Images**.
- When the **Edit Image** window appears, click the appropriate tab for the image you wish to work with: **Image 1** or **Image 2** (or **Image 3**, for the Combined Form).

For a Long Form or the back page(s) of a Combined Form:

- Click on the appropriate **Lockout Steps** icon  in the **Procedure Sections** panel.
- When when the **Procedure Step** window opens, click the tab for the lockout step you wish to add or replace an image in.
- Click the radio button for **Image**, then click **Select**. The **Edit Image** window will open with the option for only one image.

NOTE: Long Form procedures and the back pages of a Combined Form procedure can incorporate multiple images, but only one per lockout step.

- 2 Click the **Browse...** button to browse to the folder where your images are stored.
- 3 When you locate your image in the Windows **Open** dialog box, click on it and then click the **Open** button, *OR* simply double-click on the image file. The image will be copied into the **Edit Image** window.

NOTE: If you are replacing an existing image, the new image will overwrite the existing one at this point.

- 4 Enter or modify the title you want to assign the image by typing it into the **Image Title** box or clicking the down-arrow and selecting one from the list.

Editing Images in Procedures

LOCKOUT-PRO™ Graphical Procedure Writing Software includes several built-in image-editing functions to ensure your image is clear and informative. These functions, whose controls appear on the right side of the **Edit Image** window, allow you to:

- Make the entire image darker or lighter.
- Increase or decrease the contrast between the light and dark areas of the image.
- Crop the photo to display only the area you want to include.
- Rotate the image as much as you wish.

Each adjustment you make to the image will be reflected in the preview window as soon as you make it. In addition, you can also dynamically change the magnification level of the image to see a close-up or more distant view. Simply click on the zoom-in or zoom-out buttons in the editing controls section of the window.

To edit an image in a procedure:

- 1 Open the image in the **Edit Image** window:
 - NOTE:** When you add an image to a procedure, a **copy** of the image you are using is created and stored with the procedure. As a result, you can crop and otherwise modify an image for the procedure without affecting the original image file.
- 2 Adjust **Brightness** by clicking and holding your cursor on the slider and moving it to the left to make the picture lighter, or to the right to make it darker.
- 3 Adjust **Contrast** by clicking and holding your cursor on the slider and moving it to the left to reduce the contrast, or to the right to increase the contrast.
- 4 To crop the image:
 - Click the **Crop** button.
 - Drag your cursor to outline the area of the image you want to keep. The mouse will draw a rectangle where you move it.
 - Release the mouse button to crop the area outside the rectangle.
- 5 To rotate the image, click the **Rotate** button once. Each time you click **Rotate**, the image rotates 90 degrees clockwise.
- 6 If you do not want to keep the editing changes you have made, click the **Reset** button. All edits you have made will be undone, and the image in the preview window will look as it did when you first opened it.

NOTE: The **Reset** button only cancels the edits you make before you click **OK**. If you edit an image, close this window, and then come back, the edits you made previously can no longer be reset.

Using Labels on Images

LOCKOUT-PRO™ Graphical Procedure Writing Software offers the capability of adding energy source labels or text labels to the images in your procedures. You can use labels to pinpoint the control points or to direct attention to another part of the photo.

To add labels to an image:

- 1** After adding the image to the procedure (see “Adding Images to Procedures” on page 4-25), access the image in the **Edit Image** window.
- 2** Click the **Label Image...** button to open the **Label Image** window.
- 3** To add an energy source label (e.g., E-1, H-1), select the energy source from the list of sources in the box to the right of the image. Then click the **< Add to Image** button. The energy source abbreviation appears in a box in the upper left corner of the image. Follow the same steps to add other energy sources from the list.
- 4** In the **Custom Text** box, enter any text you want to appear in a label on the image, and click the **< Add to Image** button beneath it.
- 5** To move each label to its appropriate location on the image, click on the label and drag it to the correct place on the image.
- 6** If you want to remove a label you’ve added, click on the label itself, where it appears on the image, and then click the **Remove Label** button.
- 7** When you are done adding and placing labels, click **OK**.

Corporate Policy

The second item of related information consists of a sample generic **Corporate Policy** on lockout/tagout and other features of an energy-control program. You can use this fully editable document as a template for your own company's policy by clicking on the link provided in the sample policy.

Employee Training

The **Employee Training** section guides you through a thorough training program for employees and other personnel working in your facility. It includes an outline and more detailed information about recommended training topics, as well as materials that can be used during the training.

Device Guide

The **Device Guide** presents information on the lockout devices available from your Brady distributor. For the most common devices, this section also includes training videos that clearly show the proper application of each device.



TIP: You can easily change the sources used in Related Information. For example, you may want to link the Corporate Policy section to your own organization's policy. You can make these changes using the Edit Defaults function of LOCKOUT-PRO™. For details on how, see "Changing Section Settings Defaults" on page 7-19.

Viewing & Printing Related Information

You can view and print any of these materials from either LOCKOUT-PRO™ Standard Version or Viewer Version.

To view Related Information:

- 1 From the main window, click the down-arrow on the **Related Information** shortcut on the primary options taskbar.

-OR-

Click **View** on the main menu.

- 2 From either drop-down menu, click the item you wish to view.

The HTML document containing the information will appear in the main window, and a tab for it will be added to the window tab bar.

- 3 To access information from the main page of the information, click on any link.

To print Related Information:

- 1 With the page you want to print displayed in the main window, click **File** from the main menu.
- 2 Click **Print** from the drop-down menu.
- 3 In the **Print** window that opens, select your options.
- 4 Click the **Print** button.

Format Differences in Earlier Versions

Format of energy source identifier: LOCKOUT-PRO™ Graphical Procedure Writing Software v3.0 initially sets the icon as the default way of representing an energy source. The format of a converted procedure will automatically default to whatever default has been set in v3.0. You can also change the format after conversion. (*To change the default itself, see “Change Energy Source Type Defaults” on page 7-4.*)

Number of images in Short Form: With the addition of the Combined Form in v3.0, it is no longer necessary to try to accommodate slightly longer procedures with the Short Form. As a result, the Short Form now supports only two images, whereas earlier versions permitted additional images on subsequent pages if the procedure exceeded a single page. When you import a Short Form with more than two images, LOCKOUT-PRO™ will prompt you to select the two images to leave in.

Custom energy types: If you are importing a procedure that contains a custom energy type you added to the system defaults in v2.x, the converted procedure will keep that custom energy type. However, the import process will not add the custom energy type to the system defaults in v3.0. If you want the custom energy type to be available for other procedures in v3.0, you will need to add it to the defaults. (*See “Setting & Changing Energy Source Defaults” on page 7-3.*)

Energy source legend: Version 1.0 included a static legend line identifying the energy source abbreviations used on the procedure form. This area was eliminated in v2.x and is not present in the v3.0 templates either, so that element is discarded from procedures converted from v1.0.

“Control panel” label: Version 1.0 included a “control panel” image label, in addition to the energy source labels supported in v2.x and v3.0. When you convert v1.0 procedures to v3.0, these labels are changed to custom text labels and remain on the image in the imported procedure.

Importing a Single Procedure

To import a single procedure into LOCKOUT-PRO v3.0:

- 1 With LOCKOUT-PRO™ v3.0 open, click **File>Import> Procedure File (v1.x & v2.x)**.
- 2 When the Windows **Open** dialog box appears, it displays the files in the default directory for LOCKOUT-PRO™. Select the file to import and click **Open**. LOCKOUT-PRO™ will begin converting the file to v3.0.

NOTE: If the file to convert is in a different directory, use the **Open** dialog box functions to locate the directory and display the file.

- 3 When the procedure appears in the main display area, it has been converted, and you can make any changes to it that you wish (*see “Creating/Revising Procedures” on page 4-1*). When you are done, click the **Save Procedure** button on the primary options taskbar.
- 4 The Windows **Save As** dialog box will open. Type in the name you want the procedure saved as. The conversion process is complete.

NOTE: If you use the same name as the v1.x or v2.x procedure, the v3.0 procedure will automatically overwrite the earlier one.

Importing Multiple Procedures

You can import multiple v1.x or v2.x procedures into v3.0 in one batch process, as long as the procedures to be imported are all located in the same directory.

To import multiple procedures into v3.0:

- 1 With LOCKOUT-PRO™ v3.0 open, click **File>Import** and then either **Convert v1.x Files** or **Convert v2.x Files**, depending on which version your earlier files were created in.
- 2 In the **Batch Convert** window that appears, make sure the directory containing the files to be converted appears in the **Source** box, and the directory where the converted files are to be saved appears in the **Destination** box.

NOTE: You can use the **Browse** function to find and display the correct directories for both fields.

- 3 With the correct directories displayed, click the **Start Conversion** button. During the conversion process, LOCKOUT-PRO™ will:
 - Place a checkmark next to each file as it is converted.
 - If necessary, prompt you to choose images for Short Form procedures containing more than two.
- 4 When the conversion is done, you can browse to another directory containing more files you want to convert, or you can close the **Batch Convert** window and return to the main LOCKOUT-PRO™ window.

Exporting Procedures to Other Formats

One of the benefits of LOCKOUT-PRO™ is that you can export procedures you’ve already created into formats that can be used by other applications, such as CMMS systems.

To export a v3.0 procedure to another format:

- 1 In LOCKOUT-PRO™, open the procedure to export, making sure it is displayed as the active tab.
- 2 From the **File** menu, select **Export Procedure**.
- 3 Select the format you want to export the procedure to:
 - **PDF** (file type *.pdf)
 - **Color TIFF** (file type *.tif)
 - **Black & White TIFF** (file type *.tif)
 - **JPEG** (file type *.jpg)
- 4 The standard Windows **Save As** dialog box will appear. Type in the name you wish to use for the exported file.

NOTE: If the correct directory is not displayed, use the Windows browse function to access that directory.

- 5 Click the **Save** button. The procedure will be saved in your chosen format, making it accessible from the application you wish to use it with.

SETTING DEFAULTS IN LOCKOUT PRO



One of the powerful features of LOCKOUT-PRO™ Graphical Procedure Writing Software is its built-in structure of data and text defaults that can save countless hours of entering repetitive data every time you create or revise a procedure.

In addition, you can customize the data in LOCKOUT-PRO™ to match your own organization's terminology, equipment, and other lockout/tagout data. When you customize the defaults, your changes will appear whenever you use the program.

This chapter explains how you can:

- Add a new energy source type to the list of sources.
- Add or modify basic data, such as header notes, energy source locations, controls, and lockout device selections.
- Add or modify the default lockout application steps and lockout release steps.
- Modify date formats.
- Change the content of related information.

How Defaults Work

The process of generating a lockout/tagout procedure in LOCKOUT-PRO™ involves compiling information into a format that is accurate, easy to understand, and in compliance with regulations.

Brady Corporation has already programmed into LOCKOUT-PRO™ information that is frequently used by numerous companies to create effective lockout/tagout procedures. These information “defaults” automatically appear in the windows and dialog boxes used to create or edit a procedure.

In addition, LOCKOUT-PRO™ Graphical Procedure Writing Software provides the flexibility to create your own defaults and to modify or delete the ones included with the application. As a result, you can customize the application to meet your specific needs in terms of images and text that appear on a procedure.

When you make any changes to the default lists, those changes will appear every time you work in LOCKOUT-PRO™ from that point on.

Accessing System Defaults

You can change any of LOCKOUT-PRO™'s system defaults from the **Admin** option on the main menu.

To access the system defaults:

- 1 From the main menu, click **Admin**.
- 2 Click **Set Defaults** from the submenu.
- 3 The **Set Defaults** window will open, displaying five tabs at the top — one for each category of defaults. Click the category tab for the settings you wish to change.
- 4 Follow the specific steps listed below for working with each type of default:
 - Energy source defaults
 - Basic data defaults
 - Lockout step defaults
 - Procedure defaults
 - Section settings defaults
- 5 When you are done working with the defaults, click the **OK** button on the **Set Defaults** window to return to the main LOCKOUT-PRO™ window.



TIP: When changing a default, be sure to verify that your changes are correct before you click the **OK** button. If you make an error or change your mind, you can restore the existing defaults by clicking the **Cancel** button on the **Set Defaults** window. The window will close, and your changes will be discarded.

Setting & Changing Energy Source Defaults

When the **Set Defaults** window first opens, the information in the **Energy Sources** tab is on top. From this tab, you can:

- Indicate how the energy source **identifier** should appear on the procedure (icon or abbreviation format).
- Add, change, or remove **types** of energy sources.
- Add, change, or remove energy source **descriptions**.

Following are the step-by-step instructions for making changes to any of these three default types.

Change Energy Source Identifier Default

When an energy source is displayed graphically, LOCKOUT-PRO™ Graphical Procedure Writing Software automatically inserts either an **icon** or an **abbreviation** as an identifier. You can determine which of these options to set as the default.

To set the default for energy source identifiers:

- 1 Access the **Set Defaults** window and select the **Energy Sources** tab.
- 2 In the **Identifier** section of the window, click the radio button next to the description of how you want energy sources to appear visually on procedures:
 - The option to **Show energy source icon** sets **icons** as the default (for example, ⚡ for electrical energy sources).
 - The option to **Show energy source identifier** sets the **letter-number abbreviation** as the default (for example, **E-1** for electrical energy sources).
- 3 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

- 9 When finished, click **OK** in the **Add/Edit Energy Source Type** window to return to the **Set Defaults** window.
- 10 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To edit an energy source type on the default list:

- 1 Access the **Set Defaults** window and select the **Energy Sources** tab.
- 2 In the box displaying the energy source types, click the one you want to change. Then click the **Edit** button under the box.
- 3 The **Add/Edit Energy Source Type** window will appear with all the current information displayed for that type. Make the changes you wish in these fields:
 - **Energy Type:** Enter changes to the name of the source.
 - **Abbreviation:** Enter changes to the abbreviation
 - **Color:** Change the color by clicking the **Select** button. Click the new color in the **Color** window, and then click **OK**.
 - **Icon:** Change the icon by clicking the **Select** button to the right of the box. Then click the new icon in the **Select Energy Source Icon** window and click **OK**.
- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove an energy source type from the default list:

- 1 Access the **Set Defaults** window and select the **Energy Sources** tab.
- 2 In the box displaying the energy source types, click the energy source you want to remove.
- 3 Click the **Remove** button. The energy source type will be removed from the display.

NOTE: You cannot remove the “Note” type from the list of energy source types.
- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove an energy source description from the default list:

- 1 Access the **Set Defaults** window and select the **Energy Sources** tab.
- 2 In the **Descriptions** box, click the description you want to remove.
- 3 Click the **Remove** button. The description will be removed from the display.

NOTE: If you accidentally remove a description, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the description will be restored.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Setting & Changing Basic Data Defaults

As you create a lockout/tagout procedure, you will find “shortcuts” to adding text to the procedure via lists of words or phrases that you can click to insert into the procedure. These lists include information for header notes, energy source locations, controls, and lockout devices.

You can customize these lists by adding, modifying, or deleting items. From the **Basic Data** tab in the **Set Defaults** window, you can:

- Add, modify, or remove items on a list of statement to use in the “**Note**” section of a header.
- Add, modify, or remove items on a list of **controls** to use in lockout instructions.
- Add, modify, or remove items on a list of machine **location points** to insert into lockout instructions.
- Add, modify, or remove items on a list of **lockout devices** to specify in lockout instructions.

Following are the step-by-step instructions for making changes to any of these default lists.

Header “Note” Defaults

A lockout/tagout procedure often requires special notes, such as warnings, information about a machine feature, or other communication that is not part of a specific lockout step. LOCKOUT-PRO™ Graphical Procedure Writing Software provides a display box on procedure headers where that information can be inserted. To speed up the process, LOCKOUT-PRO™ also provides a list of common notes from which you can select — or you can customize the list to meet your specific needs.

BUILT-IN OPTIONS FOR TEXT “NOTES” IN HEADERS

Name:	Text That Will Appear on Procedure:
Capacitor	This machine has internal capacitors. You must ensure they are fully discharged before proceeding.
Chiller	This machine is capable of generating extremely cold temperatures. Allow it to return to room temperature before proceeding.
Flywheel	This machine has an internal flywheel. You must ensure that it has come to a complete stop before proceeding.
Heater	This machine is capable of generating extremely high temperatures. Allow it to return to room temperature before proceeding.
Molding Press	You must ensure the internal capacitors are fully discharged before proceeding. This procedure does not deenergize the external electrical outlets.
Injection Molder	Machine generates extreme heat and pressure. Ensure pressure has vented and press is room temperature before proceeding.

To add a note to the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Notes (Procedure Header)** section of the window, click the **New** button.
- 3 When the **Add/Edit Notes** window appears, enter the short name of the note in the **Name** box.

NOTE: When you are creating the header of a procedure, the list of default notes will display only these names — not the full text of the note.
- 4 In the **Text** box, type in the full text of the note as you want it to appear on the procedure.

- 5 Click **OK** to add the note. The name you entered will be added to the list on the **Set Defaults** window.
- 6 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To modify a header note on the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Notes (Procedure Header)** section of the window, click the note you wish to edit, then click the **Edit** button.
- 3 When the **Add/Edit Notes** window appears, enter your changes to either or both the short name and the full text of the note.
- 4 When finished, click **OK** to return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove a header note from the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Notes (Procedure Header)** section of the window, click the note on the list that you wish to remove.
- 3 With the note's name highlighted, click the **Remove** button.

NOTE: If you accidentally remove a note, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the note will be back on the list.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Change Controls & Methods Defaults

BUILT-IN OPTIONS FOR CONTROLS AND METHODS

Name:	Text Description of Method:
Disconnect	Turn Disconnect to the off position and lock out.
Breaker	Turn Breaker to the off position and lock out.
Plug	Unplug and apply lockout device.
Ball Valve	Turn Valve to the off position and lock out.
Globe/Gate Valve	Turn Globe/Gate Valve to the off position and lock out.
Dump Valve	Turn Dump Valve to the off position and lock out.

To add a control and its method to the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Controls** section of the window, click the **New** button.
- 3 When the **Add/Edit Controls** window appears, enter the name of the control in the **Name** box.
- 4 In the **Text** box, enter the description of the method used to apply the control, just as you want it to appear on the procedure.
- 5 Click **OK** to add the control and return to the **Set Defaults** window, where the control will be added to the list.
- 6 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To modify a control and/or method on the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Controls** section of the window, click the control you wish to edit, then click the **Edit** button.
- 3 When the **Add/Edit Controls** window appears, enter your changes to either or both the name of the control and the description of its method.
- 4 Click **OK** to save the changes and return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove a control from the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Controls** section of the window, click the control on the list that you wish to remove.
- 3 With the control's name highlighted, click the **Remove** button.

NOTE: If you accidentally remove a control, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the control will be restored.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Change Location Defaults

BUILT-IN OPTIONS FOR SPECIFYING LOCATIONS

Name:	
North	Front
South	Back
East	Infeed
West	Discharge
Top	Left
Bottom	Right

To add a location to the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Locations** section of the window, click the **New** button.
- 3 When the **Add/Edit Locations** window appears, enter the location in the **Name** box.
- 4 Click **OK** to add the location. It will be added to the list of locations in the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To modify a location on the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Locations** section of the window, click the location you wish to edit, then click the **Edit** button.
- 3 When the **Add/Edit Locations** window appears, enter your changes in the **Name** text box.
- 4 Click **OK** to save the changes and return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove a location from the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Locations** section of the window, click the location on the list that you wish to remove.
- 3 With the location's name highlighted, click the **Remove** button.

NOTE: If you accidentally remove a location, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the location will be restored.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Change Lockout Device Defaults

BUILT-IN DEFAULTS FOR LOCKOUT DEVICES

Name:	
Ball valve lockout	Lock
Cable lockout	Lock and chain
Chain	Lock and hasp
Circuit breaker lockout	Pneumatic disconnect lockout
Electrical plug lockout	Universal ball valve lockout
Fuse lockout	Wall switch lockout
Gas cylinder lockout	Die block
Gate valve lockout	Pin

To add a lockout device to the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Devices** section of the window, click the **New** button.
- 3 When the **Add/Edit Devices** window appears, enter the lockout device in the **Name** box.
- 4 Click **OK** to add the device and return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To modify a lockout device on the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Devices** section of the window, click the device name you wish to edit, then click the **Edit** button.
- 3 When the **Add/Edit Devices** window appears, enter your changes in the **Name** text box.
- 4 Click **OK** to return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove a lockout device from the default list:

- 1 Access the **Set Defaults** window and select the **Basic Data** tab.
- 2 In the **Devices** section of the window, click the name of the device on the list that you wish to remove.
- 3 With the lockout device's name highlighted, click the **Remove** button.

NOTE: If you accidentally remove a device, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the device will be restored.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Setting and Changing Lockout Step Defaults: (Combined Form only)

The Back Page(s) of a Combined Form displays the steps involved in both applying the lockout and releasing it. These steps are essential for including on the procedure so employees are reminded to follow them. However, they are usually described in general terms that are applicable to most lockout/tagout procedures. To simplify the process of adding these steps to a procedure, LOCKOUT-PRO™ Graphical Procedure Writing Software includes the steps and their specific instructions in default lists for you to choose from.

Unlike the other default lists, the lockout application and release step defaults have two layers of functioning: 1) the list itself, and 2) checkboxes to include a step automatically or manually. You can customize both the contents of the lists, as well as which ones are automatically included in a procedure.

You can change these defaults by going to the **Lockout Steps** tab in the **Set Defaults** window, where you can:

- Add, change, or remove **lockout application steps** and **lockout release steps** on the default list.
- Indicate which steps should appear automatically by default, and which ones appear only if manually selected for a procedure.
- Add, change, or remove items on a list of **checks** for ensuring an energy source is fully de-energized.

Following are the step-by-step instructions for making changes to these defaults.

Change Lockout Step Defaults

Although the defaults for lockout **application** steps and lockout **release** steps consist of two different lists, the process for setting and changing these defaults is identical. You can use the procedures that follow for **either** list.

BUILT-IN OPTIONS FOR LOCKOUT APPLICATION STEPS

Name:	Text of Lockout Application Step:
Notify Employees	Notify all affected employees that the machine or equipment will be shutdown and locked out.
Review Procedure	Ensure that each authorized employee understands the type and magnitude of the energy present, the associated hazards and the proper methods of control.
Shutdown Equipment	If the machine or equipment is operating, shut it down by the normal stopping procedure.
Isolate Energy	De-activate the energy isolating device(s) so that the machine or equipment is isolated from the energy source(s).
Lockout Controls	Lockout the energy isolating device(s) as indicated on the front of this procedure.
Dissipate Energy	Dissipate any stored or residual energy as indicated on the front of this procedure.
Verify Isolation	Verify that the energy source has been isolated as indicated on the front of this procedure.

BUILT-IN OPTIONS FOR DEFAULT LOCKOUT RELEASE STEPS

Name:	Text of Lockout Release Step:
Inspect Equipment	Check the equipment to ensure that the components are operationally intact.
Check Area	Check the immediate area to ensure that all employees have been safely positioned, and that any nonessential items have been removed.
Check Neutral	Verify that operating controls are in neutral.
Re-Energize	Remove the lockout device(s) and activate the energy isolating device(s) to re-energize the equipment.
Notify Employees	Notify affected employees that the servicing or maintenance is completed and the equipment is ready for use.
Startup Equipment	Startup equipment and monitor for several operating cycles to ensure it is functioning properly.

To add a lockout step to either default list:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Application** or **Lockout Release Steps** section of the window, click the **New** button.
- 3 When the **Add/Edit Lockout Application** (or) **Release Steps** window appears, enter the short version of the step in the **Name** box.
- 4 In the **Text** box, enter the full text of the step as you want it to appear on the procedure.
- 5 Click **OK** to add the step. The short version of the step you entered in the **Name** box will be added to the list of steps in the **Set Defaults** window, and the box next to it will be checked to appear automatically on the procedure.

NOTE: If you do **not** want the new step to appear automatically on the procedure, click in the checkbox in front of it to remove the check.

- 6 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To modify a lockout step on either default list:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Application** or **Lockout Release Steps** section of the window, click the step you wish to edit, then click the **Edit** button.
- 3 When the **Add/Edit Lockout Application** (or) **Release Steps** window appears, enter your changes to either or both the short version of the step (in the **Name** box) or the long version (in the **Text** box).
- 4 Click **OK** to save the changes and return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove a lockout step from either default list:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Application** or **Lockout Release Steps** section of the window, click to highlight the step you wish to remove.
- 3 With the step highlighted, click the **Remove** button.

NOTE: If you accidentally remove a step, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the step will be restored to the list.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Changing which Lockout Steps Appear Automatically

When you are creating a procedure, the lockout application and release steps on the default list will either appear automatically on the procedure, or will show up in a list from which you can select. You determine which will happen by setting those defaults, as well.

To indicate the steps to appear automatically by default:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Application** or **Lockout Release Steps** section of the window:
 - Click to display a checkmark in empty boxes in front the steps you **do** want to be added automatically to procedures.
 - Click to remove the checkmark from any boxes of steps you **do not** want to be added automatically.
- 3 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Change Defaults for Energy Source Checks

The Combined Form provides space to include a method for checking whether a given energy source is fully locked out after completion of a step. You can select from a default list of common checks. You can also add to the list, edit the existing checks, or remove checks from the list.

BUILT-IN OPTIONS FOR DEFAULT CHECKS

Text for Checks:
Attempt to restart at control panel.
Open drain valve to dissipate pressure.
Verify gauge pressure reads zero.
Verify zero voltage reading with meter.

To add a lockout check to the default list:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Checks** section of the window, click the **New** button.
- 3 When the **Add/Edit Checks** window appears, enter the check procedure in the **Name** box.
- 4 Click **OK** to add the check. It will be added to the list of checks in the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To modify a lockout check on the default list:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Checks** section of the window, click the **Edit** button.
- 3 When the **Add/Edit Checks** window appears, enter your changes in the **Name** text box.
- 4 Click **OK** to save the changes and return to the **Set Defaults** window.
- 5 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

To remove a lockout check from the default list:

- 1 Access the **Set Defaults** window and select the **Lockout Steps** tab.
- 2 In the **Checks** section of the window, click the lockout check on the list that you wish to remove.
- 3 With the check highlighted, click the **Remove** button.

NOTE: If you accidentally remove a check, click the **Cancel** button on the **Set Defaults** window. The window will close, and when you return, the check will be restored.

- 4 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Setting & Changing Procedure Defaults

The fourth tab on the **Set Defaults** window — **Procedure Defaults** — lets you change the default settings for three additional pieces of data:

- The **length of time** before the procedure next needs to be audited
- **How** the date and time will be displayed on procedures

BUILT-IN OPTIONS FOR PROCEDURE DEFAULTS

Data:	Initially set to:	Can change to:
Next audit date interval	12 months	Any monthly interval
Date format	Date without time	Date with time

To change any of the procedure defaults:

- 1 Access the **Set Defaults** window and select the **Procedure Defaults** tab.
- 2 Make changes as desired:
 - To change the **Next Audit Date Interval**, type in a different number or use the up and down arrows to shorten or lengthen the interval.
 - To change the **Date Format**, click the radio button next to the format you want to use.
- 3 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

Changing Section Settings Defaults

The fifth tab on the **Set Defaults** window — **Section Settings** — lets you change the source of the four sets of related information available from the **View** menu or the **Related Information** shortcut on the primary options taskbar.

LOCKOUT-PRO™ Graphical Procedure Writing Software provides these supplementary materials to support your overall energy-control program. *(For more information about these materials, see Chapter 5, “Using Related Information”).* At any time you can change a section setting to access a different HTML document.

To change any of the section setting defaults:

- 1 Access the **Set Defaults** window.
- 2 Select the **Section Settings** tab. The window displays four sections, one for each item of related material.

NOTE: Except for the additional field in the **Regulations** section, the functions for all four sections work identically.

- 3 *In the **Regulations** section only:* To link to the regulations for a different country, click the down-arrow in the text box for **Country** and click the country of your choice. The regulations for that country will now appear in the related information.
- 4 *For all four sections:* To link to a different HTML document, click the radio button by **Address (url)** in the section you are changing.
- 5 Enter the address of the new source in the text box.
 - If the document links to a website, type in the full URL.



TIP: You can also paste a URL you've copied from an Internet or intranet site. Simply open the desired page in your browser, select the address, and copy it. Then paste it into this field in LOCKOUT-PRO™.

- If the document links to an HTML file on your computer or server, you can type in the address or click the **Browse...** button to find the file in the customary way.

NOTE: Only HTML documents can be used for the related information links.

- 6 Click the **Test** button for the section. A window will open with the new document in it. If the document is the one you want displayed in **Related Information**, close the window. If not, repeat step 5.
- 7 In the **Set Defaults** window, click **OK** to save your changes or **Cancel** to discard them.

WORKING WITH TEMPLATES



The ability to use templates when creating lockout/tagout procedures is one of the key benefits of LOCKOUT-PRO™ Graphical Procedure Writing Software. Templates let you create procedures faster and ensure that they contain all the information needed for safety and regulatory purposes.

For each of the three forms — Long, Short, and Combined — LOCKOUT-PRO™ provides templates designed for both sheet-fed printers and the Brady GlobalMark printer, which prints the procedure onto a tape roll.

You can also modify these templates in many ways to customize them for your particular needs. This chapter goes into detail on templates, explaining:

- How templates are used to create procedures
- How templates differ from defaults
- What aspects of the templates can be customized
- Step-by-step instructions for modifying the templates

Understanding LOCKOUT-PRO Templates

Procedure templates define how content is included and formatted, and determine what content is standard. They also control the titles, text, colors, and layout, for example, and warnings or messages that need to be on every procedure.

Using templates helps ensure that your employees know exactly where to look for a specific type of information and that the information is presented clearly. They also ensure that terms, descriptions, instructions, and so forth are used in a consistent manner.

While the templates are designed by Brady's lockout/tagout specialists to ensure compliance, they also provide you the flexibility to modify them to best meet your needs.

Templates vs. Defaults

Templates and defaults both customize LOCKOUT-PRO™ Graphical Procedure Writing Software to make it work effectively for you, but they focus on different aspects.

- **Templates control the type and format of content that appears on a procedure**, while defaults control the specific wording of choices for a given type of content.

For example: Defaults offer a list of energy source types from which you can choose when creating a specific procedure. Templates, on the other hand, determines how that energy source type appears on the printed procedure.

- **Template changes, are specific to a certain form** — Long, Short, or Combined — and printer — sheet-feed or GlobalMark, while changes to the lists of defaults apply to all three forms.

For example: If you change the default so an energy source identifier uses an abbreviation vs. an icon, that default will show up on every procedure after changing it once. However, if you want to substitute the LOCKOUT-PRO™ logo with one of yours on all procedures, you must make that change on all three templates for each type of printer, if you use both sheet-fed and GlobalMark printers.

*For more on **defaults** and how to customize them, see Chapter 7, “Setting Defaults in Lockout PRO”.*

Deciding How to Customize Templates

Before you make change a template, it's a good idea to look at the existing one and decide changes will best meet your needs.

What Can Be Changed on a Template

In general, the following changes can be made to templates:

- The content of text that appears automatically on procedures can be changed, and the format (e.g., size, font, bold, italics, color) can be modified.

- The format of text that will be added to the procedure when it is written can be changed.
- Graphics can be replaced with other graphics.

What Cannot Be Changed on a Template

LOCKOUT-PRO™ Graphical Procedure Writing Software procedures look like word-processed documents, but in fact are the output of a powerful database engine. As a result, their templates cannot be changed as you might expect to change a word-processed document.

While LOCKOUT-PRO™ offers a range of customization options, it does not allow the following types of changes to templates:




- Lines, rectangles, and other graphic elements cannot be deleted.
- Boxes, the location of images, and other objects cannot be moved, resized, rotated, or deleted.
- Additional graphics or text boxes cannot be added.

Illustration of Editable Areas on Templates

To help you identify your customization needs, look at the sample forms that follow. Although these examples utilize the templates for sheet-fed printers, the same items and areas exist on forms templated for GlobalMark printers.


NOTE: The sample illustrations that follow are marked up to show how they can be changed. The following table explains the meaning of the marks.

KEY TO TEMPLATE CHANGES INDICATED ON SAMPLE FORMS

If the template area is:		You can make these changes:
Outlined by a blue rectangle		<ul style="list-style-type: none"> • Edit any or all of the text contained in the template • Change the formatting of the text
Outlined by a rounded teal rectangle		<ul style="list-style-type: none"> • Change the formatting of the text contained in the template • Change the formatting of the procedure-specific text that will be added when the procedure is created or revised
Indicated by a dark-green arrow		<ul style="list-style-type: none"> • Replace the graphic

SAMPLE SHORT FORM: EDITABLE TEMPLATE AREAS

Lockout-Tagout Posted Procedure




ID#: MC-123456	Facility: Longshore	Location: Room 222
Created: 6/20/2006	Description: Molding press in SW corner	
Revised: 6/20/2006		

1	Lockout Points	Note: You must ensure the internal capacitors are fully discharged before proceeding. This procedure does not deenergize the external electrical outlets.
----------	-----------------------	--

Lockout Application Process

1. Notify affected personnel. 2. Properly shut down machine. 3. Isolate all energy sources. 4. Apply lockout devices, locks, & tags. 5. Verify total de-energization of all sources.



Energy Source	Location	Method	Device
Electrical Primary Feed	Breaker E-1 is located on the Bottom side of the machine.	Turn Breaker to the off position and lock out.	Circuit breaker lockout

Lockout Removal Process

1. Ensure all tools and items have been removed. 2. Confirm that all employees are safely located. 3. Verify that controls are in neutral. 4. Remove lockout devices and reenergize machine. 5. Notify affected employees that servicing is completed.

<i>Page Footer (left)</i>	<i>Page Footer (center)</i>
---------------------------	-----------------------------

Page 1 of 1

SAMPLE LONG FORM: EDITABLE TEMPLATE AREAS

Lockout-Tagout Posted Procedure


LOCKOUT-PRO™ 3.0

ID#: MC-123456 Created: 6/20/2006 Revised: 6/20/2006	Facility: Longshore Description: Molding press in SW corner	Location: Room 222
--	--	--------------------

2	Lockout Points	Note: You must ensure the internal capacitors are fully discharged before proceeding. This procedure does not deenergize the external electrical outlets.
---	----------------	--

Lockout Application Process

1. Notify affected personnel. 2. Properly shut down machine. 3. Isolate all energy sources. 4. Apply lockout devices, locks, & tags. 5. Verify total de-energization of all sources.

Lockout Steps		
Step #	Action	Info
1	<div style="background-color: #f00; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">⚡</div> Electrical Primary Feed	The E-1 Breaker is located on the East side of the machine. Turn Breaker to the off position and lock out. <div style="float: right; width: 100px; height: 100px; border: 1px solid #ccc; background-color: #eee; margin-top: 10px;"></div>
2	<div style="background-color: #900; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">⚙️</div> Hydraulic Inlets	The H-1 Globe/Gate Valve is located on the West side of the machine. Turn Globe/Gate Valve to the off position and lock out. Use a Gate valve lockout device. <div style="float: right; width: 100px; height: 100px; border: 1px solid #ccc; background-color: #eee; margin-top: 10px;">  </div>

Lockout Removal Process


1. Ensure all tools and items have been removed. 2. Confirm that all employees are safely located. 3. Verify that controls are in neutral. 4. Remove lockout devices and reenergize machine. 5. Notify affected employees that servicing is completed.

Page Footer (left)

Page Footer (center)

Page 1 of 1

SAMPLE COMBINED FORM - FRONT PAGE: EDITABLE TEMPLATE AREAS






LOCKOUT PRO™ 3.0 **LOCKOUT/TAGOUT POSTED PROCEDURE**

ID# MC-1234566

Description: Molding press in SW corner	Created: 6/20/2006	by: John Doe
Facility: Longshore	Revised: 6/20/2006	by:
Location: Room 222	Next Audit: 6/20/2007	by: Jane Doe

2 Lockout Points **Note:** You must ensure the internal capacitors are fully discharged before proceeding. This procedure does not deenergize the external electrical outlets.



Energy Source	Device	Location	Method	Check
 Electrical Primary Feed	Electrical plug lockout	Breaker E-1 is located on the East side of the machine.	Turn Breaker to the off position and lock out.	Attempt to restart at control panel.
 Hydraulic Returns	Pneumatic disconnect lockout	Globe/Gate Valve H-1 is located on the Top side of the machine.	Turn Globe/Gate Valve to the off position and lock out.	Attempt to restart at control panel.


Emergency Contact Information

Call Joe at 555-5555

Page Footer (left)	Page Footer (center)
---------------------------	-----------------------------

Page 1 of 1

SAMPLE COMBINED FORM - BACK PAGE: EDITABLE TEMPLATE AREAS



LOCKOUT/TAGOUT POSTED PROCEDURE

ID#:

Notes

Follow procedure exactly.

LOCKOUT APPLICATION STEPS

#	Step	Instruction	Additional Info
1	Notify Employees	Notify all affected employees that the machine or equipment will be shutdown and locked out.	
2	Review Procedure	Ensure that each authorized employee understands the type and magnitude of the energy present, the associated hazards and the proper methods of control.	
3	Shutdown Equipment	If the machine or equipment is operating, shut it down by the normal stopping procedure.	
4	Isolate Energy	De-activate the energy isolating device(s) so that the machine or equipment is isolated from the energy source(s).	
5	Lockout Controls	Lockout the energy isolating device(s) as indicated on the front of this procedure.	
6	Dissipate Energy	Dissipate any stored or residual energy as indicated on the front of this procedure.	
7	Verify Isolation	Verify that the energy source has been isolated as indicated on the front of this procedure.	

LOCKOUT RELEASE STEPS

#	Step	Instruction	Additional Info
1	Inspect Equipment	Check the equipment to ensure that the components are operationally intact.	
2	Check Area	Check the immediate area to ensure that all employees have been safely positioned, and that any nonessential items have been removed.	
3	Check Neutral	Verify that operating controls are in neutral.	
4	Re-Energize	Remove the lockout device(s) and activate the energy isolating device(s) to re-energize the equipment.	
5	Notify Employees	Notify affected employees that the servicing or maintenance is completed and the equipment is ready for use.	
6	Startup Equipment	Startup equipment and monitor for several operating cycles to ensure it is functioning properly.	

Procedure Change Notification

Contact your supervisor if you have any questions or concerns about the accuracy or effectiveness of this procedure.

Page Footer (left)

Page Footer (center)

Page 2

Editing a Procedure Template

When you edit a LOCKOUT-PRO™ Graphical Procedure Writing Software template, all future procedures that use that template will be changed according to the edits you make. Existing procedures will retain the template format in which they were created.

Each template can be edited separately. Changes to one will not appear on another, even in areas that are identical, such as the header. The general steps for editing templates, however, are similar for all templates.

To edit a template:

- 1 From the main window, click the **Admin** menu and select **Edit Template**.
- 2 When the **Select Template** window appears, the three forms are displayed. Click the form whose template you wish to edit, and then click **OK**.
- 3 Check the printer that appears in the **Printer** field of the **Select Template** window.
 - If your intention is to modify the template for that printer, continue to the next step.
 - If you wish to modify the template for a different printer, first switch to that printer by clicking the down-arrow and selecting it from the list.
- 4 The **Edit Template** window opens, displaying the template for the form and printer combination you chose. Verify that this is the template you wish to change. (If not, close the window and start again at step 1 of this procedure.)

NOTE: The preview zoom factor is set to show the width of the template. To change magnification, click the zoom in/out controls at the top of the window. If you zoom in so that the page no longer fits in the window, horizontal and vertical scrolls bars will appear so you can scroll to all areas of the template.

- 5 To determine if an area is editable, click on that area in the preview window. If you can edit this area, an editing box consisting of a black outline with square black “handles” will appear around that area.
- 6 To make a change to the template, **double-click the area on the preview** that you wish to change. Make the changes you want as follows:
 - **Change or delete text:** Place your cursor in the text and use standard word-processing functions to delete and type text.

- **Change text formatting:** With the editing box visible around the text area you wish to change, apply any of the formatting changes available from the text-editing toolbar at the top of the **Edit Template** window:
 - **Font Type:** To change the font, click the down-arrow by the text box displaying the current font, and click your choice of font on the drop-down list.
 - **Font Size:** To change the size of the text, click the down-arrow next to the text box displaying the current point size, and click your choice of size from the drop-down list.
 - **Auto Size Text:** To have text automatically sized to fit into the box, click the auto-size icon.
 - **Bold, Italics, Underline:** To add or remove these style attributes, click their icons once. When they are *on*, their icons will be outlined by a shaded box. When they are *off*, the icon outlines will disappear.
 - **Justification:** To change the justification, click the icon indicating the justification you wish (left- or right-justified, or centered).
 - **Color:** To change the color of the text, click the color-palette icon. A standard color-picker window appears. Click on the color you want to use. Then click **OK**.
 - **Change a graphic:** Double-click on the existing graphic and then select the replacement graphic from the standard Windows **Open** dialog box. If the graphic you want is in a different directory, use the Windows browse function to locate the file.
- 7 To deselect an area after editing it, click anywhere on your screen that is **outside** the area.
 - 8 At any time during the editing process, you can print a sample of your revised template by clicking the **Test Print** button on the **Edit Template** window. When you print a test version, the **Edit Template** window will remain open so you can make additional changes or reset the template.

NOTE: Before you save the template, you can discard your changes by clicking the **Reset** button. Doing so will restore the template to how it was when you opened it for editing.
 - 9 When you have finished editing the template, click the **Save** button. The edited template will overwrite the previous version of the template.

NOTE: You cannot save a template under a different name because only one template per form and printer is allowed. To ensure the original templates aren't deleted from your system, however, a copy of the original template is saved in a separate directory on your computer. If you need to restore a template to the factory default, contact Brady Technical Support for instructions.

- 10 To exit the **Edit Template** window, click the **Close** button. If you have made any changes since you last saved the template, you will be prompted to save your changes if you wish.