

QUICK GUIDE

CATEGORIES

MODULE SETTINGS



The screenshot shows the 'Categories' page in the 'Safety' module settings. The breadcrumb trail is 'Module settings > Safety'. The page title is 'Categories'. A message at the top states: 'You must have at least one category for the module to become active.' Below this, a table lists categories: 'Category', 'Daily Tasks', 'Audits', 'Claims', and 'Crane'. A callout explains: 'Categories allow you to group your templates into like topics with shared characteristics. User assignments leverage categories to allow for granular access to templates.' On the right, a box titled 'TWO PURPOSES for CATEGORIES:' lists: 1. Organizing Forms (with an example of 'Daily Tasks' category) and 2. Granting User Permissions (with an example of 'Human Resources' category). Buttons for 'Cancel' and 'Save' are at the top right.

Module settings > Safety

Module summary **Categories** Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans Templates

Cancel Save

Categories

You must have at least one category for the module to become active.

Create at least one category for the module. ⓘ

<input type="checkbox"/>	Category
<input type="checkbox"/>	Daily Tasks
<input type="checkbox"/>	Audits
<input type="checkbox"/>	Claims
<input type="checkbox"/>	Crane

Categories allow you to group your templates into like topics with shared characteristics. User assignments leverage categories to allow for granular access to templates.

TWO PURPOSES for CATEGORIES:

- Organizing Forms**
For example, an end user can access the "Daily Tasks" category, which includes forms like the Job Hazard Analysis or if the user needs the Cable Installation form, they can navigate to the "Electrical" category.
- Granting User Permissions**
For example, the same end user may be restricted from accessing the "Human Resources" category, which contains sensitive forms and documents related to HR processes.

NOTE: Categories and Classifications can only be added/removed at the Root Organization level.

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CLASSIFICATIONS

MODULE SETTINGS



The screenshot shows the 'Classifications' settings page for the 'Safety' module. The breadcrumb trail is 'Module settings > Safety'. The page has tabs for 'Module summary', 'Categories', 'Types', 'Classifications' (active), 'Statuses', 'Email templates', 'Roles', 'User assignments', 'Inspection & Test Plans', and 'Templates'. A 'Cancel' button and a green 'Save' button are in the top right. A callout box explains: 'Classifications allow you to further classify a form for association to filters and reporting. They can also facilitate logic within a form.' Below this, a text prompt says 'Create any desired number of classifications for the module.' followed by an information icon. A table with a '+' and '-' icon at the top lists classifications: 'Classification', 'Final Walkdown', 'Initial Walkdown', 'Lanyard', and 'Near Miss', each with an unchecked checkbox.

<input type="checkbox"/>	Classification
<input type="checkbox"/>	Final Walkdown
<input type="checkbox"/>	Initial Walkdown
<input type="checkbox"/>	Lanyard
<input type="checkbox"/>	Near Miss

SAMPLE USE CASE for CLASSIFICATIONS:

For example, you are conducting a safety audit and filling out the associated form. There are multiple work activities associated with each potential discipline. Choosing “cable termination”, will classify this form as Electrical. This Classification can then be used to show/hide additional form sections.

NOTE: Categories and Classifications can only be added/removed at the Root Organization level.