Categories

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

Create at least one category for the module. ⓘ

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

	Category
☐	Daily Tasks
☐	Audits
☐	Claims
☐	Crane

TWO PURPOSES for CATEGORIES:

1. **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.

2. **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 allow you to further classify a form for association to filters and reporting.

They can also facilitate logic within a form.

Classifications

Create any desired number of classifications for the module. ⓘ

☐	Classification
☐	Final Walkdown
☐	Initial Walkdown
☐	Lanyard
☐	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.

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