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

Categories

Create at least one category for the module. ⓘ

Category
Daily Tasks
Audits
Claims
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:

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.

C-XYZ / Settings

Module settings > Safety ▾

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

Cancel   Save

Classifications

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

They can also facilitate logic within a form.

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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