

**Customizing Categories and Causes for Safety Obs** 

\*Customizing Categories and Causes follow the same method, for simplicity, **Category Maintenance** is show in this example

## Instructions:

- 1
- Logon to your Safety Reports Admin page
- 2 Select **Observations** along the grey bar at the top of the screen
- 3 Select either **Category Maintenance** or **Cause Maintenance** at the far-left side of the screen
- 4 Categories/Causes created by Safety Reports can be hidden from Observers by 'unchecking' boxes in the Include column at the far-right
- 5 To create a new Category/Cause, select the Add New Category button at the far-right
- 6 Type the name of the new Category in the **Category Name** box, and select the **Submit** button
- Custom categories can be viewed or edited anytime by selecting the Custom radio button under the Category Source heading
- 8 The new **Category** will be available to Observers in the mobile app for their next observation

