SAFETY REPORTS

Setting up Custom Cover Letters

A Safety Reports Enterprise Inspection Account allows for customization of the cover letter which accompanies inspection reports. Cover letters can be set as 'Global' meaning the same cover form style accompanies all inspections; User-specific, meaning each inspector on the account has their own cover form format; and, Company-specific, which allows each 'Company' within the system to have its own unique cover form format. This guide covers how to edit these types of cover form.

Note: only 1 account logo/symbol can be used, different departments/clients/locations cannot have their own logo, though they can have their own company-level cover form.

The use of Directives is applicable to all types (Global, User- and Company-specific) of the cover form. Directives are links which allow certain inspection or account data to be presented on the cover form. Directives are shown within brackets, and available types of directives are available on the User Defined Settings page of the admin site, under the 'Directives' tab in User Defined Settings. For example, to show the name of the Company Contact on the cover form, use this directive: [companycontactname], and so forth.

Note: Do not edit the directives, by adding spaces or changing text for example. Changing the company contact directive to [company contact name] will cause the cover form to show that literal text only, and not the linked information.

Custom Cover Letter ('Global' and 'User'-Specific)

1. Login to your Admin Account
2. Choose 'User Defined Settings' from the functions at the far-left
3. At the right-hand side of the screen there are 3 tabs, 'Global,' 'User,' and 'Directives'
   a. To edit the Global cover form, choose the 'Global' tab, for User-specific, choose the 'User' tab
4. If 'Global' is chosen, make edits in the dialogue box provided
   a. Keep in mind the items related to Directives discussed above in this document
   b. When complete, choose the green 'Save as Custom Cover Letter' button below the dialogue box
5. If 'User' is chosen, choose the user you want to edit the cover form for from the drop-down menu, then make edits
6. When complete, choose the green 'Save as Custom Cover Letter' button below the dialogue box
   a. Note: a display will show what type of cover form the inspector is currently using
   b. If you wish to make an inspector use the Global format, simply choose the green 'Use Default Cover Letter'

Custom Cover Letter (Company)

1. Login to your Admin Account
2. Choose 'Company Maintenance' from the functions at the far-left
3. Select All Users from the 'User Accounts' drop-down menu
4. Find the row showing the company you wish to use a custom cover letter for, choose the 'Edit' button on that row
5. Scroll to the 'Settings' section of the page, marked by a green bar of the same name.
6. Use the 'Cover Letter Template' drop-down menu to choose 'Custom'
7. In the dialogue box that appears below, modify whatever you like, specific to that company
8. When finished, choose 'Update Cover Letter' then at the bottom of the screen, 'Update Company'