

## Blue Lemon Modules: Compliance

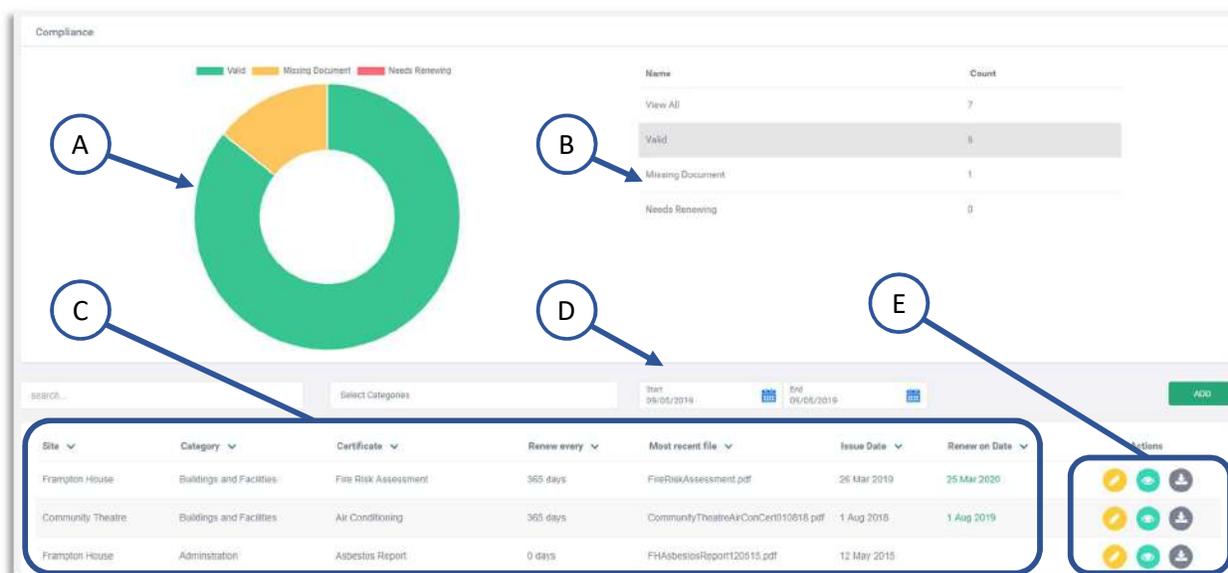
### Module Overview

What is the Compliance Module for?

The Blue Lemon Compliance Module is designed to help you manage and track externally moderated certifications and licences. Examples include TV licences, legally required insurances and external certifications for equipment.

Compliance Certificates are uploaded to the system, along with their date of issue and renewal. They are easily available for recall and download, and an email reminder is sent to the document owner when the certificate or licence is approaching its renewal date.

*Compliance Module Overview Screen*



- A)** Graphic Performance Overview gives an at-a-glance indicator of performance across the Compliance Module
- B)** Performance Breakdown displays the numerical values from the Graphic Overview
- C)** Compliance Document List shows currently uploaded documents, their Site, status, and renewal date.
- D)** The Search Tools enable you to filter your search for a specific document
- E)** Action Icons for Edit, Show Previous and Download functions

## Adding New Compliance Documents

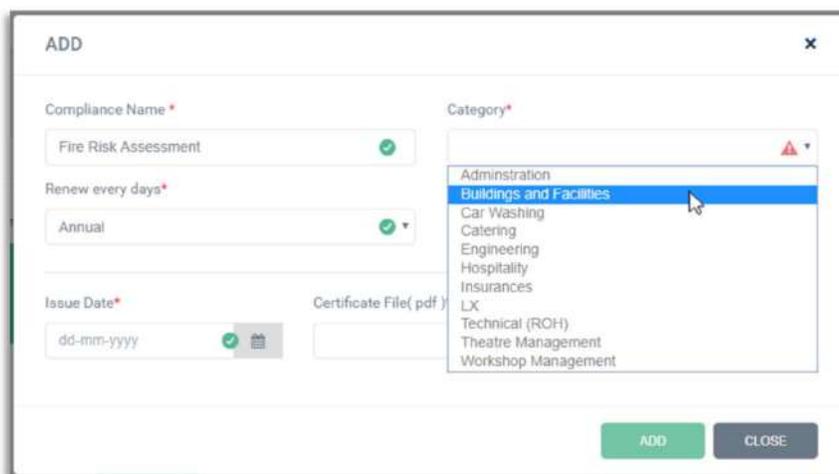
Adding a completely new record into the Compliance system can only be carried out by a User who has Administrator Privileges for the Compliance Module (See [User Access Levels](#))



Click the 'Add' button at the right of the Compliance Overview Screen. This will open a new window (see right).

Complete each field.

'Compliance Name' is simply the type of document that is being entered (in the example, a Fire Risk Assessment has been entered).

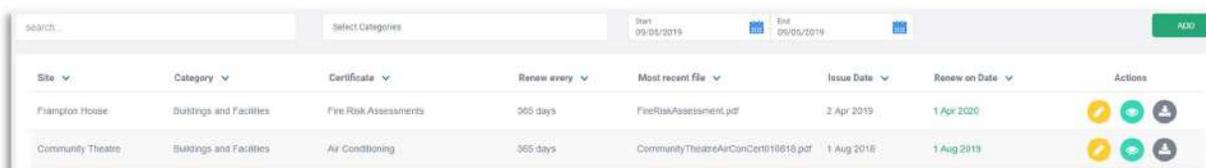


Choose the Category, Renewal Interval and Site Name from the drop-downs in each field, then, when you are ready to upload the compliance document file, click 'Browse' and navigate to the computer folder where you have saved a scanned copy of the document (Blue Lemon works best with the PDF format).

Once the upload has completed, click the 'Add' button at the bottom of the window (to cancel the upload at any point, simply click 'Close').

## Updating Existing Compliance Documents

Anyone with 'Editor' access or above for the Compliance Module can update existing documents (for example, when needing to upload an updated certificate). To edit a record, navigate to the Compliance Module from the Sidebar and scroll downwards to view the Compliance Document List:

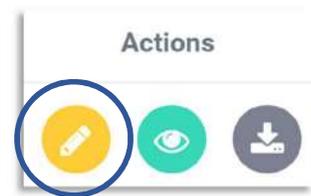


Site	Category	Certificate	Renew every	Most recent file	Issue Date	Renew on Date	Actions
Frampton House	Buildings and Facilities	Fire Risk Assessments	365 days	FireRiskAssessment.pdf	2 Apr 2019	1 Apr 2020	[Icons]
Community Theatre	Buildings and Facilities	Air Conditioning	365 days	CommunityTheatreAirConCert010618.pdf	1 Aug 2018	1 Aug 2019	[Icons]

The Compliance Document List displays 30 records per screen by default. You can navigate between screens using the controls at the bottom of each screen, or you can search for the document you need using the Search Tools; type the first few letters of the document title into the search bar to narrow down the documents displayed.

Alternatively, click 'Select Categories' to choose from a list of available options, which will show only Compliance Document results from the selected category or categories.

Once you have located the record you wish to update, look at the Action Icons at the right-hand-side of the Compliance Document List, and click on the **edit** icon (circled), which opens the Compliance record editing window:



**EDIT** ✕

Compliance Name\*  ✓      Category\*  ✓

Renew every days\*  ✓      Site\*  ✓

Issue Date\*  ✓      Certificate File(pdf)\*        Comment

Actions

In this window, you can upload a new version of the certificate by clicking 'Browse' and navigating to the scanned copy of the updated document.

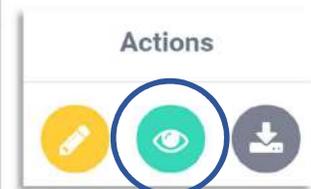
You can also add actions for another Blue Lemon user by clicking on the blue 'Add' button in the 'Actions' box. This will open a new dialogue box as shown below, where you can

input the action required and assign a user to complete the action. Simply type in the action required, choose a user from the drop-down box, and select a completion date for the action. Click 'Save' to complete the process.

### View Previous

**VIEW PREVIOUS** ✕

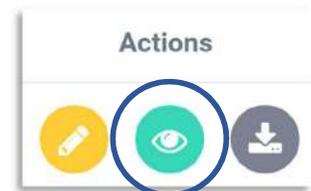
ID	Name	Uploaded Date	
<input type="text" value="ID"/>	<input type="text" value="Name"/>	<input type="text" value="Uploaded Date"/>	
8	FireAlarmSprinklers100118.pdf	03-Apr-19	<input type="button" value="Download"/>



Clicking on 'View Previous' in the Action Icons will display a list of previous document files, and their upload date, which can be downloaded if required.

### Download

Clicking the 'Download' button next to a compliance document record will allow you to download a PDF copy of the document to be printed or stored locally on your computer.



Note – for Compliance Administrator Functions, please see the Administrator: Compliance section.