

Blue Lemon Modules: Documents

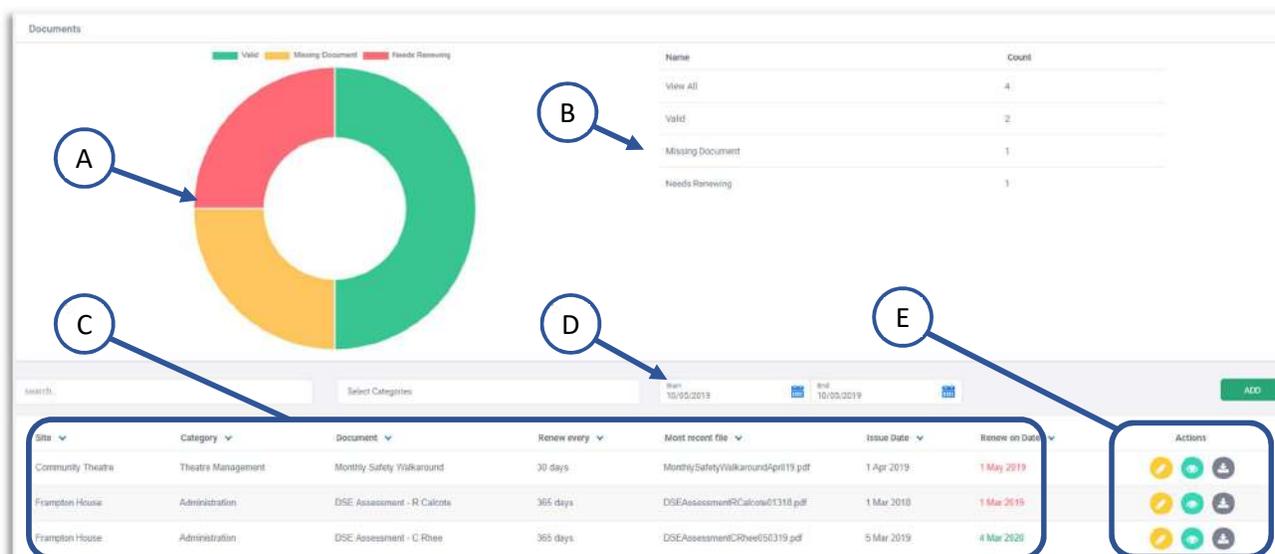
Module Overview

What is the Documents Module for?

The Blue Lemon Documents Module is designed to help you manage and track internal checks and regular actions. Examples could include monthly safety walkarounds, internal DSE Assessments, or Safety Meeting minutes.

Documents are uploaded to the system, along with their date of issue and renewal (where appropriate). They are easily available for recall and download, and an email reminder is sent to the document owner when an assigned renewal date is approaching.

Documents Module Overview Screen



- A) Graphic Performance Overview gives an at-a-glance indicator of performance across the Documents Module
- B) Performance Breakdown displays the numerical values from the Graphic Overview
- C) 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 Documents

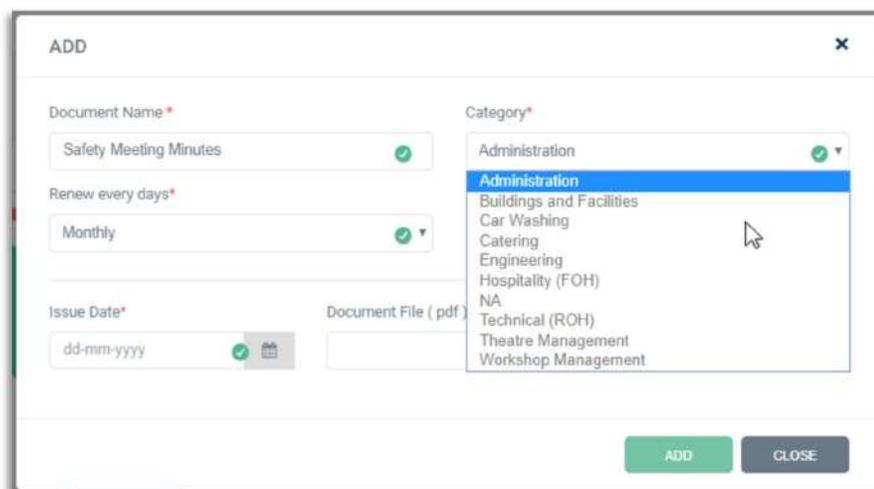
Adding a completely new record into the Documents system can only be carried out by a User who has Administrator Privileges for the Documents Module (See [User Access Levels](#))



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

Complete each field.

'Document Name' is simply the type of document that is being entered (in the example, the minutes from a Safety Meeting has been entered).

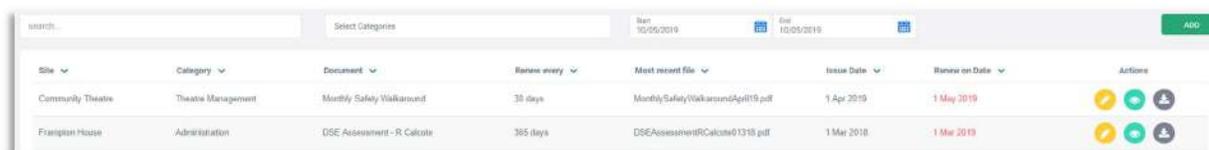


Choose the Category, Renewal Interval and Site Name from the drop-downs in each field, then, when you are ready to upload the document file, click 'Browse' and navigate to the computer folder where you have saved a scanned copy of the document (Blue Lemon works best with the PDF format).

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 Documents

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

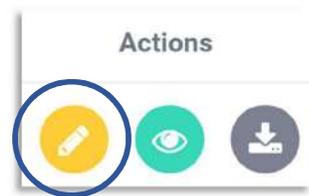


Site	Category	Document	Renew every	Next record file	Issue Date	Renew on Date	Actions
Community Theatre	Theatre Management	Monthly Safety Walkaround	30 days	MonthlySafetyWalkaroundApril19.pdf	1 Apr 2019	1 May 2019	[Icons]
Frampton House	Administration	DSE Assessment - R. Calcutt	365 days	DSEAssessmentRCalcutt01318.pdf	1 Mar 2018	1 Mar 2019	[Icons]

The 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 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 Document List, and click on the **edit** icon (circled), which opens the Documents record editing window:



EDIT ✕

Document Name* ✔ Category* ✔

Renew every days* ✔ Site* ✔

Issue Date* ✔ Document File (pdf)* Comment

Actions

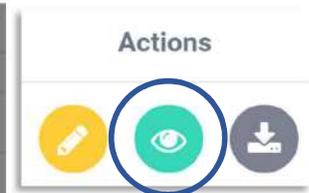
In this window, you can upload a new version of the document by clicking 'Browse' and navigating to the scanned copy of the updated document.

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](#)

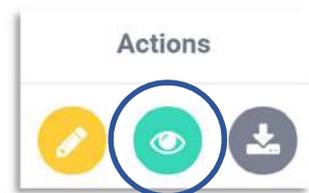
ID	Name	Uploaded Date	
<input type="text" value="ID"/>	<input type="text" value="Name"/>	<input type="text" value="Uploaded Date"/>	
9	MonthlySafetyWalkaroundApril19.pdf	03-Apr-19	<input type="button" value="Download"/>



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 document record will allow you to download a PDF copy of the document to be printed or stored locally on your computer.



Note – for Documents Module Administrator Functions, please see the [Administrator: Documents](#) section.