Documents / Document Control

Documents

Admin   List of Documents

Set up a new Category:

- Press Admin button
- Press Add New
- You will now give your category a title to help your users identify the types of documents stored in this category e.g. A category for Inspections
- You will need to add subcategories to your category, these are used to help your users easily find the documents they need. So, your Inspections category could have subcategories for Plant Inspections, Welfare Inspections, LOLER and PUWER Inspections. You can add a subcategory by clicking on the three dots next to the category of your choice.

Now that you've created your category and subcategories, you can now   + Add new document

Name *

Description

Category * Control of Works ▼

Subcategory * Control of Works ▼

ID Reference

Date * 🔲

Type * ▼

Revision

Document * **Choose File**

- You need to give your document a name, description, select the category and subcategory the document will be accessed through, give the document a number. This will be the number you would use to identify this document in your quality control system. The document will require an issue date which would be the date this document was issued for use in the company, if you do not know this then simply put the date you are uploading the document. You will need to give the document a revision, this will confirm the number of changes to this document since it's issue date.
- You can now add up to five questions that your users will need to answer when uploading a completed document. This helps for reporting as you can filter by your questions, for example, if a user uploads an accident report Question – was this accident caused by slip or trip Answer Yes.
- You can now select the document you wish to upload by choosing the file. This is the document that will be available to your users to download and complete.