Document Repository

This is where unlimited documents may be stored and organized **as an image or in PDF format.**

- **Examples:** Support Materials, User Guides, Store Financial Reports, Employee New Hire Packet, Organizational Documents, EOD reports, Deposit Slips, etc..
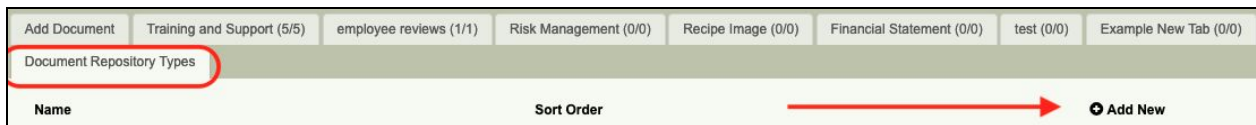
To get to the Document Repository navigate to [Operations> Document Repository]

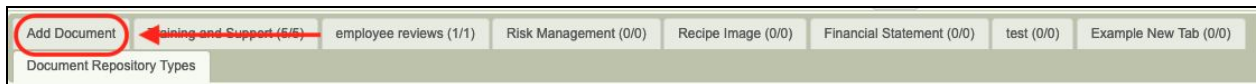**Tabs:** act like folders allowing you to easily organize your documents.

To create a new tab:

- Click on the **[Document Repository Types tab]** then **[add new]**
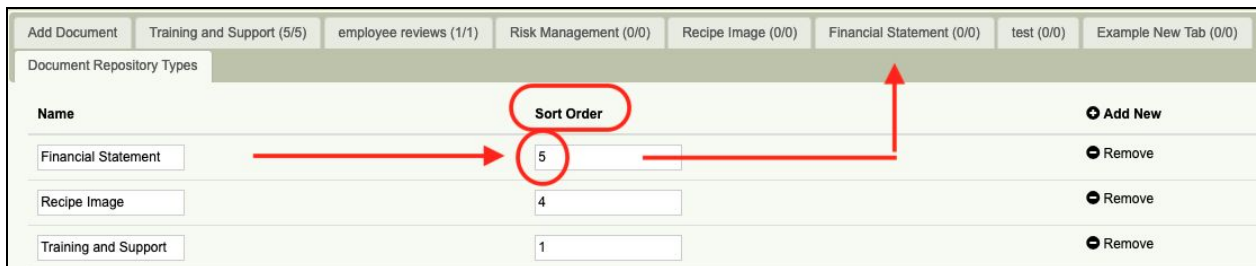

- Type the title of the Tab in the highlighted box and click **[Save Changes]**
- Click on the **[add document tab]** then refresh the page for the new tab to be active and appear

To set the tab sort order:

- Click on the **[Document Repository Types tab]** then under **[Sort Order]** enter numbers that will correspond with the order in which the tabs appear.

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To add a document:

- Click on **[Add Document tab]** then **[Select file>Choose File].**

- Select the document from its stored location
- Under **[Document Type]** select the name of the tab you want the document to reside under from the drop down.

- If you want to set a date when the document is no longer available, choose an **[Expiration of Access]** date. If not, clear the preset date.

- With the proper permissions you may be able to save the document to more than one location by highlighting all locations in order to have it listed in their repository.

- Before adding the document, set the roles and users allowed to access the document in the section to the right.
    - **Roles and Users:** Grant access to the various roles in your organization as well as permit each user access or not.

Roles	Users	
Select and deselect access to the document based on roles. All users with selected role AND with access to the document's location, will be able to view/download the document. Specific users, regardless of role, can be added or blocked for viewing from the Users tab.		

Role	Grant
Accountant	✔
efish Support	✔
GM (General Manager)	✔
HR (Human Resources)	✔
Manager	✔
OD (Operations Director)	✔
Owner	✔

Roles	Users		
user will be able to view/download the document.			

User	Grant	Deny
AIM IT Services	☐	☑
user 1	☑	☐
user 2	☐	☑
user 3	☑	☐
user 4	☑	☐
user 5	☐	☑

- **Roles:** Access to documents can be provided based on an employee's role. All users with a selected role AND with access to the document's location can view and download the document. Specific users regardless of role can be added or blocked for viewing from the user tab.

- **Users:** Select and deselect specific users to view the document, If selected regardless of the role or location permissions the user will be able to view and download the document.

- Then click on the **[Add Document]** at the bottom of the page.
- The document is now saved and accessible.

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