Maintaining Document Compliance

Use this quick reference to view and stay compliant with your partner's document requirements.

Logging in

1. Go to www.repositrak.com and click **Login**.
2. Log in with your **Username** (usually your email address) and **Password**.

About the Tabs

ReposiTrak includes four tabs.

Home. Your landing page, providing an overview of your Document Compliance, links to Become Compliant, and fast access to news feeds and tasks.

My Referential Documents. Review your partner's requirements and monitor your compliance. Upload documents and manage information about your facilities.

Partner Referential Documents. Used by your partners to set requirements.

Track & Trace. Manage item and production run information, trace batch/lot movement and usage.

Review your Document Compliance

You can review your document compliance using any of the following methods.

From the ***Home*** tab, **My Compliance Task List**:

1. Click **Become Compliant**.
2. Choose a **Partner** or specific **Document** Filter as desired.

From the ***My Referential Documents*** tab > *Setup:*

1. Click **Store and Manage Required Documents**.
2. Choose a **Partner** or specific **Document** Filter as desired.

From the ***My Referential Documents*** tab > *Research:*

1. Click **Document Exceptions**.
2. Choose a **Partner** or specific **Document** Filter as desired.

Column Descriptions and Actions

Document. Document name.

Action: If the document is present, click to view or save a copy to your computer.

Become Compliant or **Action**. Step needed to become compliant with the requirement.

Action: Click to upload a new document, new version, or to update Audit Attributes.

Status. Whether the document status meets requirements.

On File - Document is loaded and compliant.

Missing - Document is not loaded.

Expired - Expiration date has passed.

To Expire - Document will expire within 7 days.

Review Failed - Contents do not meet audit requirements. For example, missing or below minimum amounts or dates.

Effective Date. Effective date entered for the document.

Action: Click to view history showing all versions and effective dates.

Expiration Date. Date the most recent version expires and must be replaced.

Partner. Wholesaler or Retailer setting the document requirement.

Action: Mouse over the ? to display the Business Type associated with the partner's requirement.

Action: Click to view and update Attributes, such as liability amounts. Pink rows do not meet requirements.

Permission. Whether your partner can view the document.

Action: Click to Grant or Revoke access.

Delete. *Action:* Click to remove the current version.

Note. Use this to provide your partner with information about a document's status.

Action: Click to add or update a note.

Document Content Search

Use this tool to search for documents containing specific text. For example, words specific to products or product ingredients, such as “tomato” or "nitrogen fertilizer," or for location-related details such as “China” or "warehouse."

From the ***My Referential Documents*** tab > *Research:*

1. Click **Document Content Search**.
2. Select a specific **Document** type or search in All documents.
3. Enter the **Containing Text** upon which to search, such as *tomato*.

   Use asterisks * as wild cards for partial text searches. For example,**inspec*.*

   Use quotes " " to search for phrases. For example, *"sodium content"*.

   Mouse over the ? for more search hints.
4. Optionally select an **In Effect On** date to only search for documents that were current on or after a certain date.
5. Leave **Latest Versions Only** selected to search the most recent document versions. Uncheck to search in all versions.
6. Click **Find**. Documents containing the text display.
7. Click the **Document Type** to open or save.

Upload a Document

Meet your partner’s requirements by uploading missing documents or new versions of existing documents.

You can perform this from any Document List.

From the ***Home*** tab, **My Compliance Task List**:

1. Click **Become Compliant** to view documents that need your attention.
2. To add a document or replace a version, click the document's **Become Compliant** option.

   Note: If the **Status** is **Review Failed**, follow the prompts to add a new version or update the current document's Attribute values.
3. Enter or select the **Document Effective Date**.

   This is the date the agreement, policy or certificate became effective.
4. Enter a document **Version** number.

   Versions must be numeric (no letters or symbols) and can include decimals. If this is an existing document, you can accept or override the default.
5. If this document type includes **Document Audit Attributes**, such as minimum or maximum coverage amounts, the screen includes that section.

   Enter amounts from your document without currency symbols or commas. Enter dates as mm/dd/yyyy.
6. Based on your browser, click **Browse,** Choose File or similar and select the file.
7. Click **File Upload**.

Need Assistance or have a Comment?

Our ReposiTrak Support team is available to assist you. You can contact Support by telephone or e-mail using the information below. We welcome your questions, comments and suggestions.

ReposiTrak Support

Telephone: 1.888.842.5465 option 1 (Advanced Commerce)

E-mail: Support@ReposiTrak.com

Standard Support hours: 7:30am – 5:30pm Central Time

Monday through Friday (except major holidays)

You can also use the **Contact Support** link located at the top of each online screen. Click this link to complete a short form and submit your question or comment directly to Support.