Store and Manage Required Documents

ReposiTrak's Referential Document tools address regulatory visibility requirements for documents, reports, audits, certifications, and other materials related to your supply chain. You can store and share documents in any common format, including pdf, txt, rtf, doc, docx, xls and xlsx.

Version control ensures only the most recent documents display, and up-front visibility to effective dates / expiration dates provides a quick method for monitoring your compliance. The customers mandating your compliance can search for your documents by type or by content.

This guide covers the basic steps you will use to view and stay compliant with your customer's requirements. For more information on any option, please see the online Help.

Logging in

1. Go to www.repositrak.com/login.
2. Click **Supplier / Wholesaler access**.

About the Tabs

ReposiTrak includes three tabs that divide the screens by function.

My Referential Documents. Review your customer's requirements and monitor your compliance. Store private documents and manage information about your manufacturing, shipping or other facilities.

Partner Referential Documents. Set requirements for your partners and monitor *their* compliance.

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

Review your Document Compliance

1. Under *My Referential Documents > Setup*, click **Store and Manage Required Documents**.

   Any required documents **Missing** from your ReposiTrak library display by default.

2. Use the **Partner Selection** filter to choose which customer's requirements to display.

   All Partners. All customers throughout your supply chain.

   Immediate Partners Only. Customers with whom you do direct business.

   Specific Partner. Select the customer.

3. Select a **Referential Document Type**.

   Corporate. Requirements general to your business.

   Facility. Requirements for locations, such as processing or shipping facilities.

   Product. Requirements for specific product types, such as dairy or seafood.

4. Select a **Filter By** option.

   All My Documents. List all your required documents, including current documents and those missing or expired.

   Missing Documents. Display only documents required by your customers but missing from your library.

   My Documents to Expire within __ Days. List any documents set to expire within the days entered. (Enter the number of days and then click the option.)

   Required. Un-check to include documents customers have listed as optional.

Results display onscreen. See the next page for column descriptions and options.

Upload a Document

Meet your customer's requirements by uploading missing documents or new versions of existing documents.

Note: File names CANNOT contain spaces. We recommend replacing spaces with an underscore or dash.

1. Click the **Document Version**. This will show **None** if no previous version exists.
2. Enter or select the **Document Effective Date**.
3. Enter a document **Version** number.

   If a previous version exists, you can accept the default or check **Override** to enter your own.

4. Click **Browse** and select the **File to Submit**.
5. Click **File Upload**.

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Columns and Options

Results vary based on the filters chosen.

Document Type. Document name.

If a document exists, click this link to view or save a copy to your computer.

Document Version. Last version number uploaded. *None* means the document is missing.

Click to upload a new document or new version.

Document Owner. For facility or product-specific documents, the facility or product name.

If underlined, mouse over to display the *Business Type* associated with the requirement.

Status. Shows whether the document status meets your customer's requirement.

On File shows the document is loaded and current.

Missing means the document is not in ReposiTrak.

Expired shows the expiration date has passed.

Partner. Customer requiring the document.

If underlined, mouse over to display the *Business Type* associated with your customer's requirement.

Document Effective Date. Effective date entered for the document.

Click to view the history showing all versions and effective dates.

Document Expiration Date. Date the most recent version expires. Expired or about to expire documents highlight in **red**. N/A means the requirement does not include an expiration date.

Your customer sets the expiration number of days when they add the requirement.

Authorization. Displays as *Authorized* beside each customer that can view and download a copy of the document.

Click *Authorized* to deauthorize and remove the document from a customer's view.

Click *Deauthorized* to re-authorize a document.

Delete. Remove the current version and replace with the previous version (if available).

Need Assistance or have a Comment?

Our ReposiTrak Support team is available to assist you. You can contact Support by telephone or email using the information below. We welcome your comments and suggestions on how we might improve the tools and features offered in ReposiTrak.

ReposiTrak Support

Telephone: 1.888.842.5465, option 1

Email: Support@ReposiTrak.com

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

Monday through Friday (except major holidays)

You can also use the **Feedback/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.