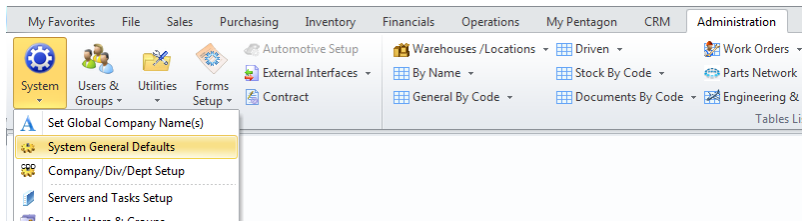# Automated Document Repository System (ADRS) Quick Reference

The Automated Document Repository System enables the storage of printed forms each time they are printed.
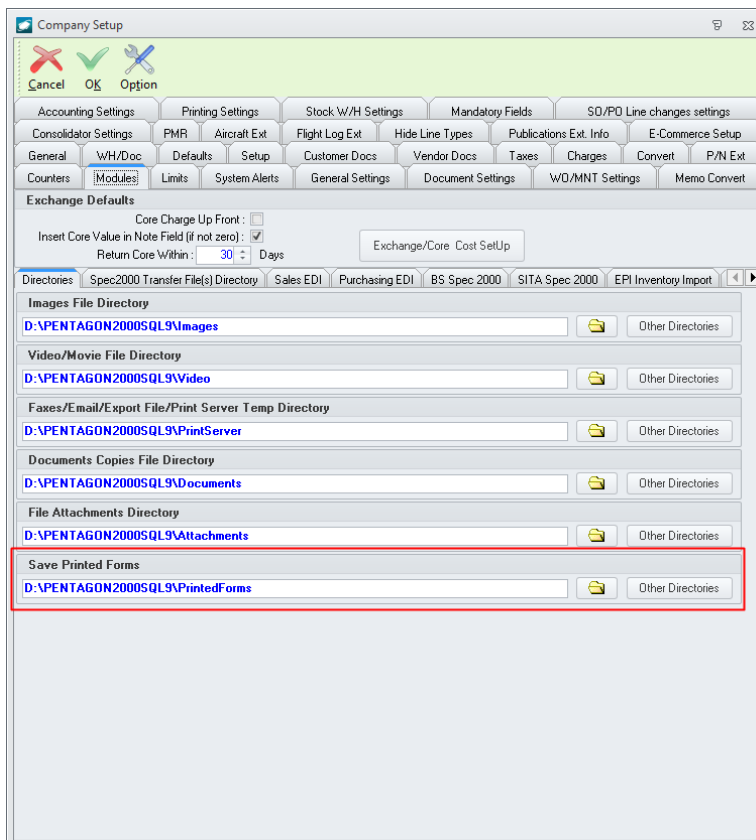
1. **Setup**

   a. *File Storage Directory*

      i. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.


   ii. The **Company Setup** window will appear. Left-click the **Modules** tab.

      iii. Identify the directory in which you would like copies of printed forms to be saved.

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iv. If you would like to save printed forms in different directories based upon document type, you may do so by using the **Other Directories** button.

1. Left-click the **Other Directories** button.

2. The **Other Directories** window will appear. Left-click the **Add** button on the **Other Directories window** toolbar.
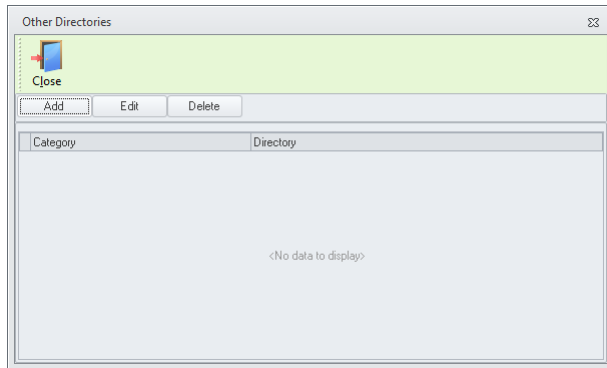

3. The **New Directory** window will appear.
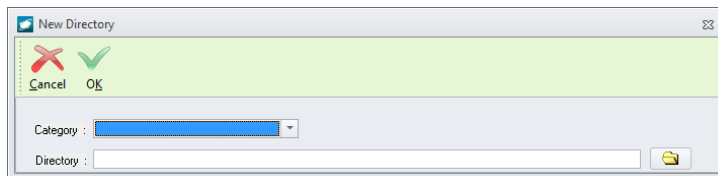
a. **Category** field – Select the document that you would like to have stored in a separate directory from the drop down list.

b. **Directory** field – Identify the directory in which you would like the printed forms originating from the document identified in the **Category** field to be stored.

c. Left-click the **OK** button on the **New Directory** window toolbar to save the record and close the window.

CONTINUE TO NEXT PAGE

4. The new directory designation for the selected document category will appear in the grid on the **Other Directories** window.
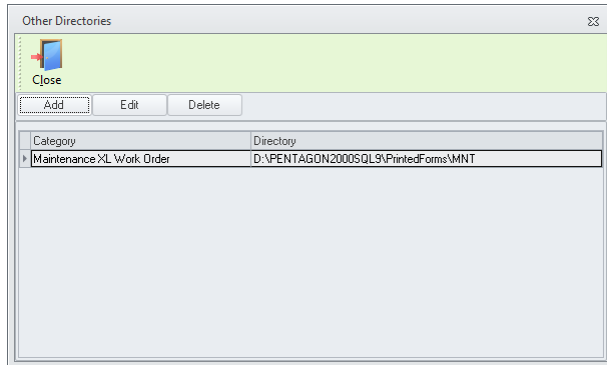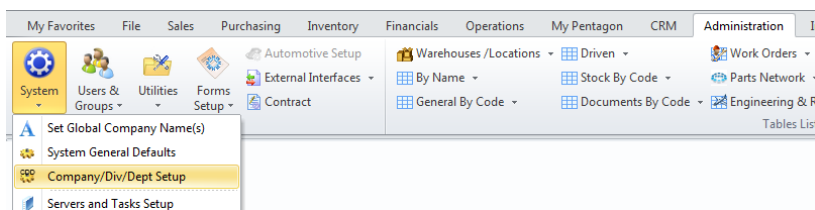

5. Left-click the **Close** button on the **Other Directories** window toolbar to close the window.

v. Left-click the **Close** button on the **Company Setup** window toolbar to close the window.

b. *Document Setup*

NOTE: ADRS is customized at the company level.

i. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **Company/Div/Dept Setup**.


ii. The **Company List** will appear. Select the appropriate company (left-click the line within the search window and left-click OK; or double-click the line within the search window).
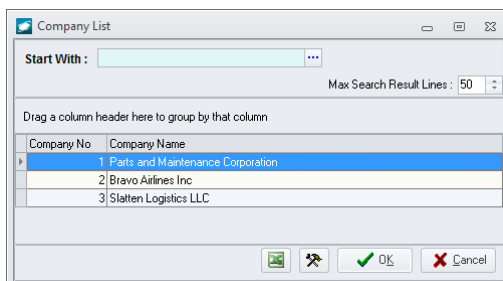
iii. The **Company** window will appear. Left-click the **Optn** (Options) button and left-click **12. Automated Documents Repository System (ADRS)**.
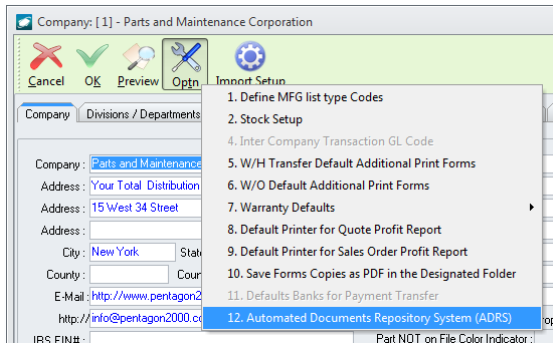

iv. The **Automated Documents Repository System (ADRS)** window will appear.
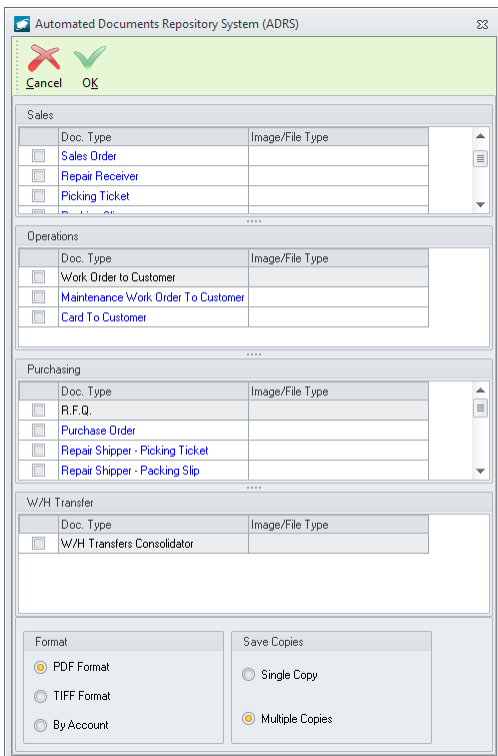
The window is split into six (6) group boxes: four (4) of which operate similarly, but for different documents; the remaining two (2) identify general settings of the module.

1. Document group boxes (**Sales**, **Operations**, **Purchasing**, and **W/H Transfer**)

    a. Flag column – Mark the flag that corresponds to each document that you would like to save as "checked".

    b. **Doc. Type** column – Identifies the document type.

c. **Image/File Type** column – Identify a code from the **Image/File Type List** by left-clicking the ellipsis in the right side of the column.
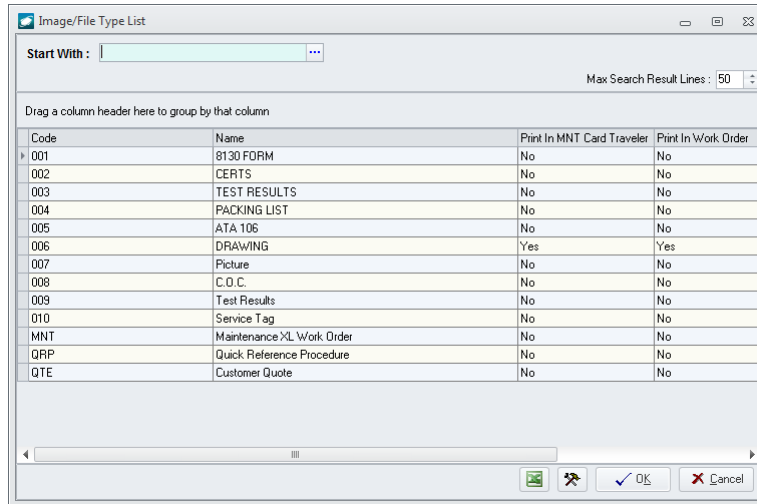
NOTE: New image/file types may be set up from the **Administration** menu. Left-click **Stock By Code**, then left-click **Image/File Type**.

d. In the example below, quotes will be saved and assigned an image/file type of "QTE"
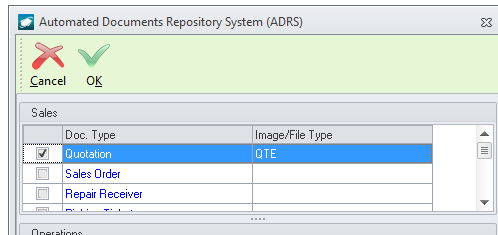
2. **Format** group box

   a. **PDF Format** radio button – Select to save all documents in PDF format.

   b. **TIFF Format** radio button – Select to save all documents in TIFF format.

   c. **By Account** radio button – Select to save based upon the default settings of the related customer (for Sales and Operations documents) or vendor (for Purchasing documents) accounts. The default file type may be found in the **Email Format** field of the **Defaults** tab of the Customer (or Vendor) file.

3. **Save Copies** group box

   a. **Single Copy** radio button – Select to save only a single copy of each document that is printed. When the document is reprinted, the previous version of the document is deleted and replaced with the new copy of the document.

    b. **Multiple Copies** radio button – Select to save a new copy of the document each time the document is printed. When the document is reprinted, a new version of the document will be saved.
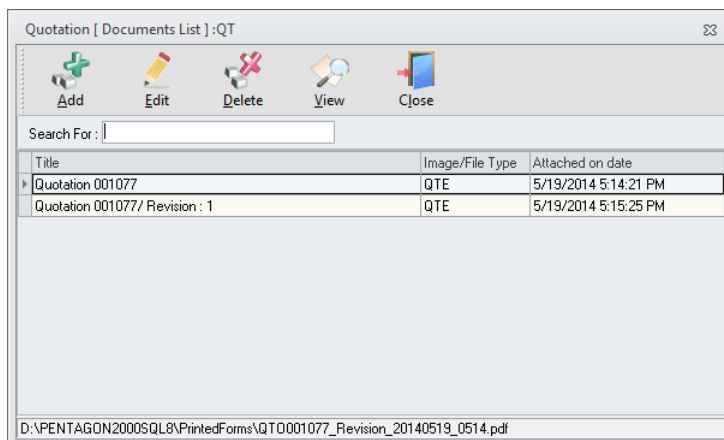
2. Functionality

Each time a document is printed a copy is saved to the directory that was set up for that document type (or to the general printed forms directory if no directory was set up for the document type) and linked to the document as an attachment at the document level.

    a. From the document, left-click the **Optn** (Options) button on the document window toolbar. Select **Attachments** and then left-click **Document Attachments**.
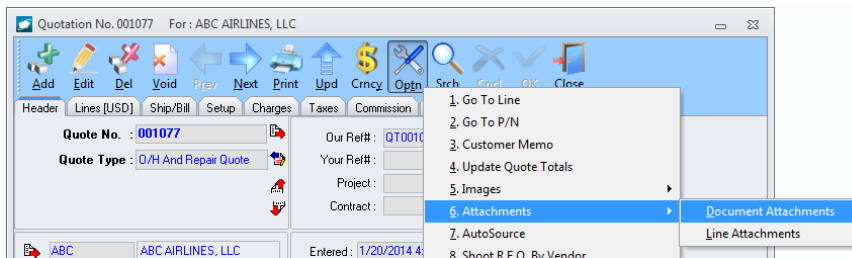
    b. The **Documents List** window will appear displaying the list of attached document copies in the grid. The example below has "Multiple Copies" enabled.

END OF DOCUMENT