

Documents library

This feature allows you to add documents to a library accessible to users directly from the platform. To do this, you must have the superuser role.

STEP 1

To add documents, go to the **Compliance → Documents library** menu, then click on the **New document** button.

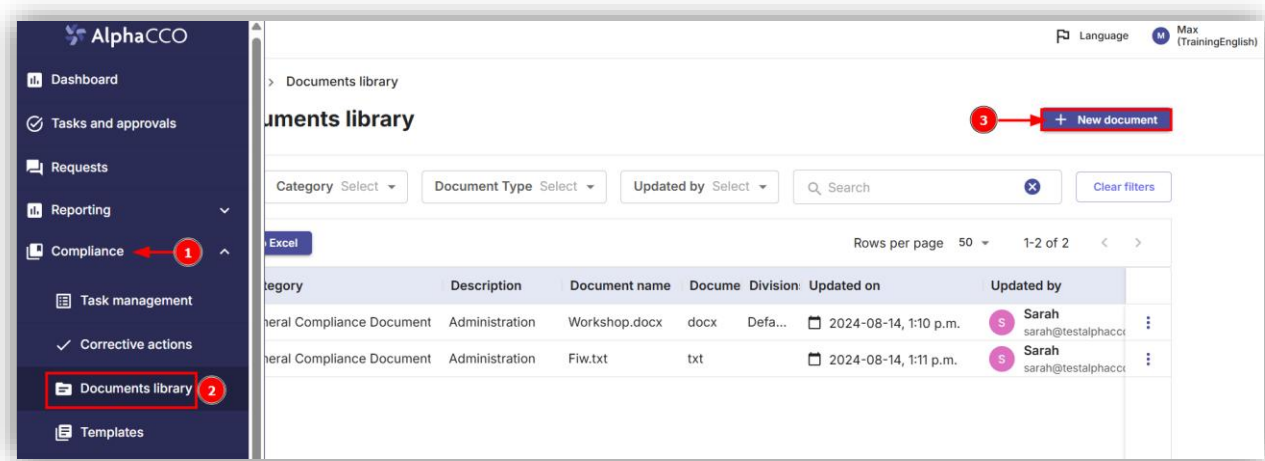


Figure 1: Document library menu page under the Compliance menu.

STEP 2

In the window that appears, enter a description of the document, then click on the **Click to upload** button. Once the document has been attached, it appears in the space below, where you can delete, view or download it.

If your license includes the **Division** feature, select the division associated with the document. Otherwise, the default field will be used.

Finally, validate the upload by clicking on **Save**.

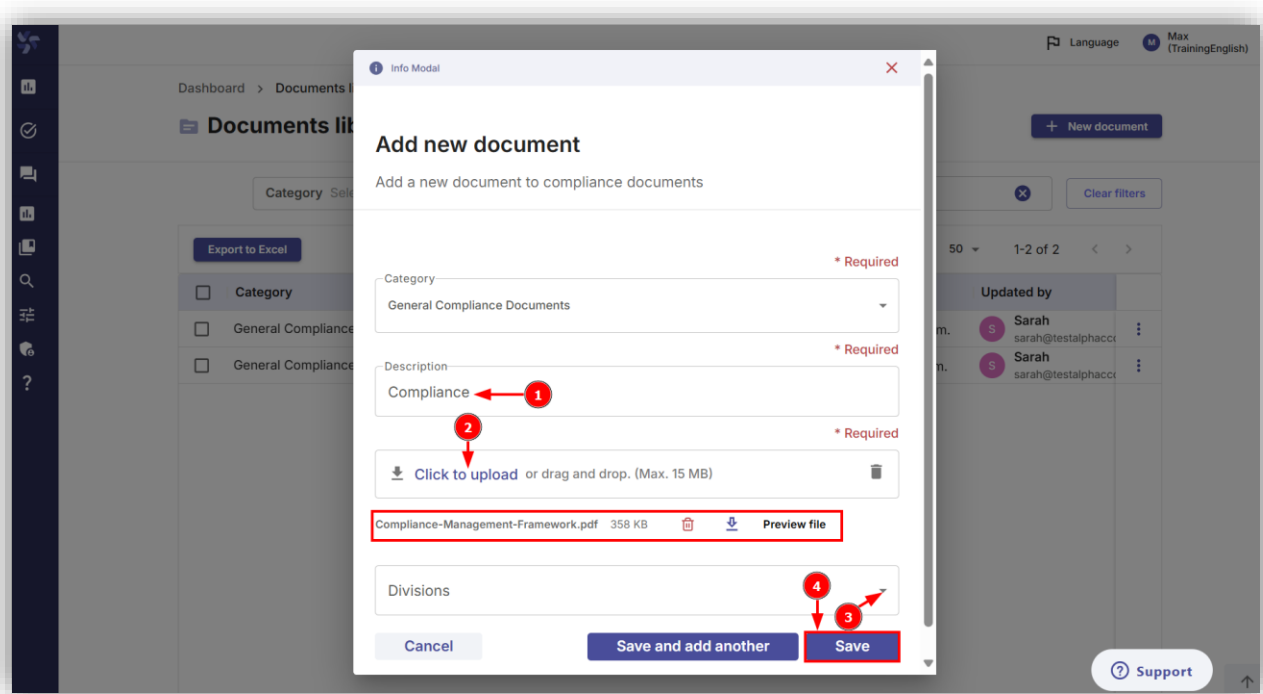


Figure 2: Document upload window

STEP 3

Once a document is uploaded, it can be accessed from the **Documents Library** menu. You can use various filters to refine the list of documents, or search by a keyword. The list of documents in the library can also be exported in Excel format by clicking on **Export to Excel**.

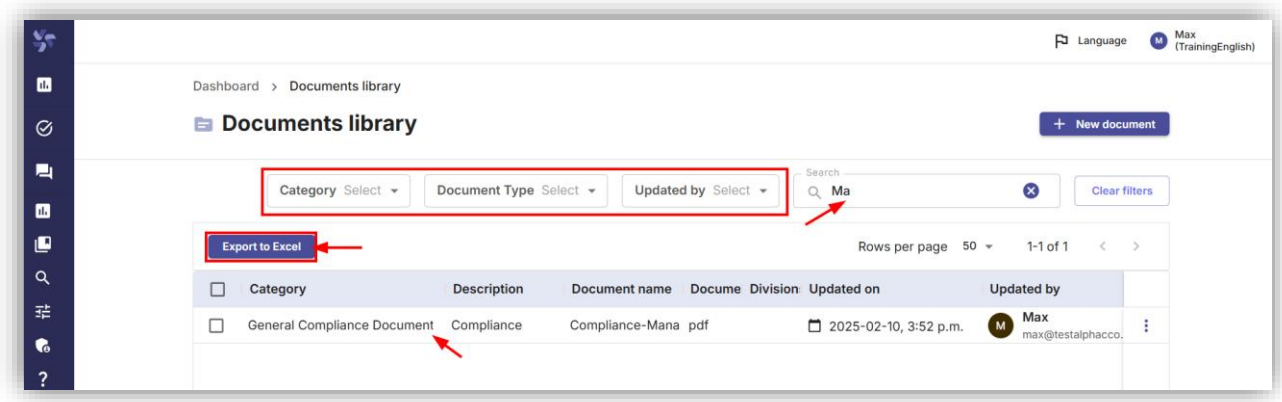


Figure 3: Document library page with the uploaded file.

STEP 4

Click on the three-dot button (⋮) to access the following options, depending on your profile:

- **Preview document:** allows you to view the document.
- **Download document:** allows you to download a version of the document.
- **Edit the document information:** allows you to modify the description or division associated with the document.
- **Delete document:** deletes the document from the platform.

The options **Edit document information** and **Delete document** are only available to superusers.

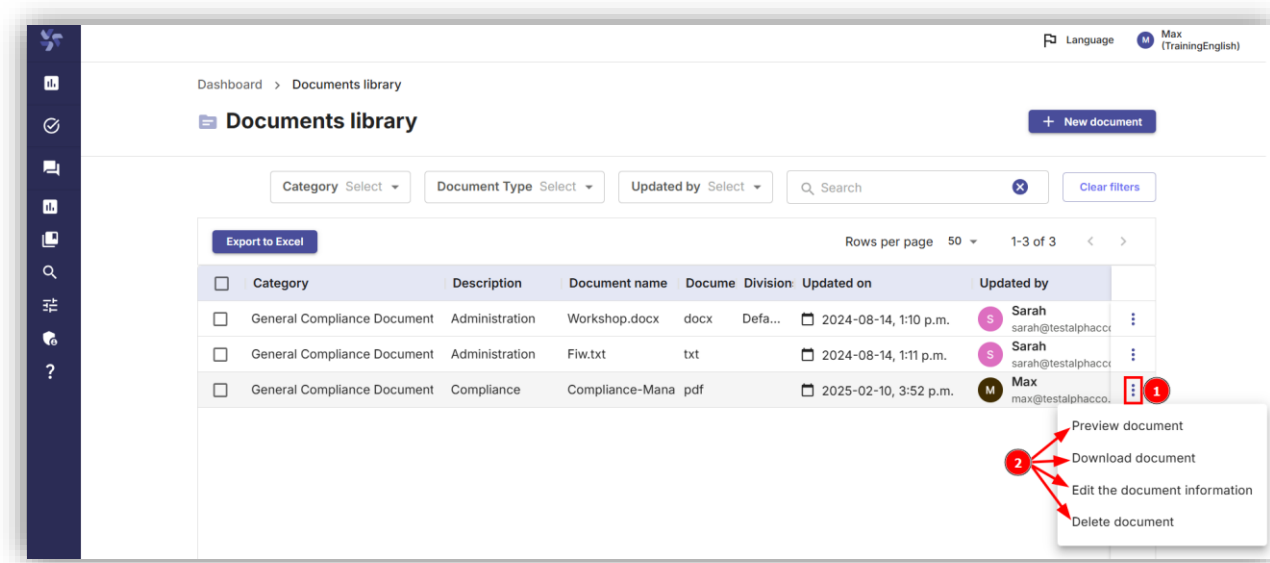


Figure 4: Document options menu buttons

NOTES

Please note that this document is only a brief guide. The AlphaCCO support team will be happy to assist you if you require further guidance. Please do not hesitate to contact us at support@alphacco.com