

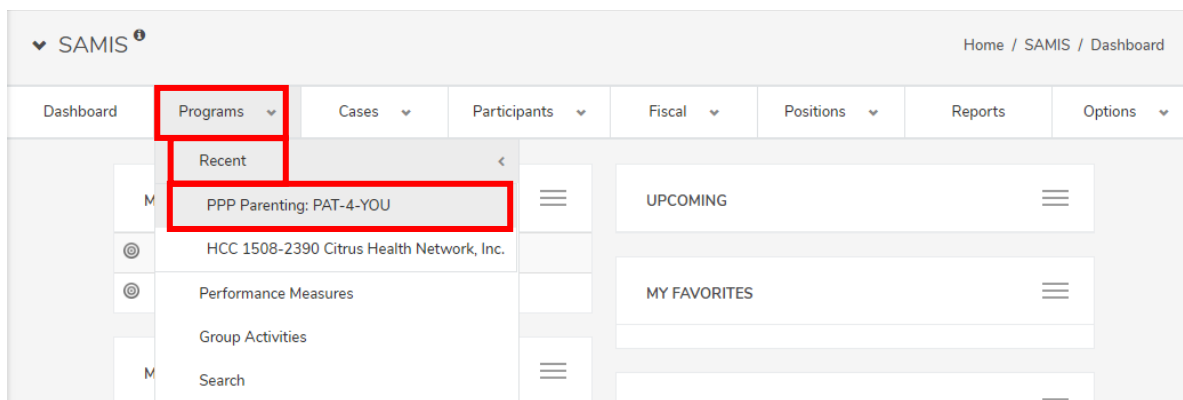


# Document Repository Guide

The Document Repository serves as a central place where supporting documentation for any fiscal document can be uploaded and accessed. You may be asked to upload supporting documentation for a fiscal document (Budget, Amendment, Reimbursement) and this where you would do so.

## How to Access the Document Repository

1. Access the SAMIS module either from the home page or the navigation menu on the left-hand side.
2. Click on the **Programs** tab to search for your program. Alternatively, hover over **Programs** and click **Recent** to jump directly to your program if you have recently accessed it – if you do this, proceed to step #4.



3. Click on the row in the grid that contains the contract for which you are looking to access the document repository. You can use filters and sorting options as needed.

The screenshot shows the SAMIS Programs grid with the 'PROGRAMS' tab selected. The grid has columns for Program Name, Agency Name, Total Allocations, and Reimbursements. The first row is highlighted with a red border.

|   | Program Name            | Agency Name           | Total Allocations | Reimbursements |
|---|-------------------------|-----------------------|-------------------|----------------|
| 1 | ECD XX99-9999 Early ... | My Sunny Miami Agency | \$0.00            | \$0.00         |
| 2 | OOS XX10-9999 OOS ...   | My Sunny Miami Agency | \$0.00            | \$0.00         |



- From the dashboard, click on the **View** dropdown menu in the upper-left and select **Document Repository**.

The screenshot shows a dashboard for the program "ECD XX99-9999 EARLY CHILDHOOD PROGRAM - MY SUNNY MIAMI AGENCY". The "View" dropdown menu is open, and "Document Repository" is highlighted. The dashboard also displays a "REIMBURSED (ALL TIME)" gauge chart and an "ALLOCATIONS BY FISCAL YEAR" table.

- You are now on the Document Repository page for this program.

The screenshot shows the "Document Repository" page for program "YAS XX14-9980 MY SUNNY AGENCY - MY SUNNY AGENCY". The page includes a "New Document" button, a "View All Documents" link, and a table of budget amendments. A note explains how to attach documents to specific fiscal documents or the program itself.

| ID    | Status   | Date Approved | # of Docs |
|-------|----------|---------------|-----------|
| 63825 | Approved | 12/01/2017    | 0         |



## How to Access Documents

1. Navigate to the Document Repository for the specific program you are interested in, as explained above
2. Fiscal documents are organized by type (i.e. **Reimbursements, Budgets, Budget Amendments**) within corresponding pods. Click on the fiscal document for which the document was uploaded.

● 1711-2481
● Yes
● \$1,500,000.00
● \$976,811.96
● 164
● 328

| Contract # | Active | Allocations | Reimbursements | Total Cases | Total Participants |
|------------|--------|-------------|----------------|-------------|--------------------|
|------------|--------|-------------|----------------|-------------|--------------------|

[New Document](#)
[View All Documents](#)

To attach a file to a specific fiscal document, FIRST click on that document in the pod below and THEN click "New Document". To attach a document to the program itself and NOT to a specific document, click on the "New Document" button above.

**REIMBURSEMENTS**

| ID    | Period              | Status   | Date Approved | # of Docs |
|-------|---------------------|----------|---------------|-----------|
| 60... | 07/01/16 - 07/31/16 | Approved | 10/14/2016    | 2         |
| 60... | 08/01/16 - 08/31/16 | Approved | 10/18/2016    | 1         |
| 61... | 09/01/16 - 09/30/16 | Approved | 11/07/2016    | 1         |
| 61... | 10/01/16 - 10/31/16 | Approved | 12/08/2016    | 1         |
| 62... | 11/01/16 - 11/30/16 | Approved | 12/22/2016    | 1         |
| 62... | 12/01/16 - 12/31/16 | Approved | 01/31/2017    | 2         |

**BUDGETS**

| ID    | Status   | Date Approved | # of Docs |
|-------|----------|---------------|-----------|
| 44358 | Approved | 07/01/2016    | 3         |

**BUDGET AMENDMENTS**

| ID    | Status   | Date Approved | # of Docs |
|-------|----------|---------------|-----------|
| 62780 | Approved | 05/04/2017    | 0         |

- a. All available documents can also be accessed in a grid format by clicking **View All Documents**. Then click on the row containing the one you are looking for.

● 1711-2481
● Yes
● \$1,500,000.00
● \$976,811.96
● 164
● 328

| Contract # | Active | Allocations | Reimbursements | Total Cases | Total Participants |
|------------|--------|-------------|----------------|-------------|--------------------|
|------------|--------|-------------|----------------|-------------|--------------------|

**ALL DOCUMENTS**

| Title                                            | Module  | Area   | Date Added | User Added | Reviewed                 |   |
|--------------------------------------------------|---------|--------|------------|------------|--------------------------|---|
| 2016-2017 Budget Modification - Children's Forum |         | Other  | 04/27/17   | lplante    | <input type="checkbox"/> | ✕ |
| 2016-2017 Budget Modification - Citrus Network   |         | Other  | 04/27/17   | lplante    | <input type="checkbox"/> | ✕ |
| Children_Forum                                   | Budgets | Fiscal | 06/23/16   | hdeus      | <input type="checkbox"/> |   |
| Citrus                                           | Budgets | Fiscal | 06/14/16   | yzaragoza  | <input type="checkbox"/> |   |



- On the corresponding fiscal document's page, click on the title of the document to download it as a PDF. If the document was uploaded as an Excel spreadsheet, you can also click on the **xlsx** button to download in an Excel format.

1714-3060 Yes \$1,058,823.00 \$650,033.18 886 932

Contract # Active Allocations Reimbursements Total Cases Total Participants

New Document

BUDGETS #47484 (APPROVED ON: 07/18/2016)

| Title                                          | Module  | Date Added | User Added | Reviewed                 |
|------------------------------------------------|---------|------------|------------|--------------------------|
| Arts4Learning_Subcontractor_Budget <b>xlsx</b> | Budgets | 06/27/16   | jgreene    | <input type="checkbox"/> |

- You can then access the document in the folder to which your downloads are saved on your computer.

## How to Upload Documents

- Navigate to the Document Repository for the specific program you are interested in, as explained above.
- Click on the fiscal document for which you want to upload a document. Fiscal documents are organized by type (i.e. **Reimbursements**, **Budgets**, **Budget Amendments**) within corresponding pods.

1711-2481 Yes \$1,500,000.00 \$976,811.96 164 328

Contract # Active Allocations Reimbursements Total Cases Total Participants

New Document View All Documents

To attach a file to a specific fiscal document, FIRST click on that document in the pod below and THEN click "New Document". To attach a document to the program itself and NOT to a specific document, click on the "New Document" button above.

| REIMBURSEMENTS |                     |          |               |           | BUDGETS |          |               |           |
|----------------|---------------------|----------|---------------|-----------|---------|----------|---------------|-----------|
| ID             | Period              | Status   | Date Approved | # of Docs | ID      | Status   | Date Approved | # of Docs |
| 60...          | 07/01/16 - 07/31/16 | Approved | 10/14/2016    | 2         | 44358   | Approved | 07/01/2016    | 3         |
| 60...          | 08/01/16 - 08/31/16 | Approved | 10/18/2016    | 1         |         |          |               |           |
| 61...          | 09/01/16 - 09/30/16 | Approved | 11/07/2016    | 1         |         |          |               |           |
| 61...          | 10/01/16 - 10/31/16 | Approved | 12/08/2016    | 1         |         |          |               |           |
| 62...          | 11/01/16 - 11/30/16 | Approved | 12/22/2016    | 1         |         |          |               |           |
| 62...          | 12/01/16 - 12/31/16 | Approved | 01/31/2017    | 2         |         |          |               |           |

| BUDGET AMENDMENTS |          |               |           |
|-------------------|----------|---------------|-----------|
| ID                | Status   | Date Approved | # of Docs |
| 62780             | Approved | 05/04/2017    | 0         |



3. On the corresponding fiscal document's page, click on the **New Document** button and select the file from your computer.

1714-3060   Yes   \$1,058,823.00   \$650,033.18   886   932

| Contract # | Active | Allocations    | Reimbursements | Total Cases | Total Participants |
|------------|--------|----------------|----------------|-------------|--------------------|
| 1714-3060  | Yes    | \$1,058,823.00 | \$650,033.18   | 886         | 932                |

**New Document**

BUDGETS #47484 (APPROVED ON: 07/18/2016)

| Title                                                   | Module  | Date Added | User Added | Reviewed                 |
|---------------------------------------------------------|---------|------------|------------|--------------------------|
| Arts4Learning_Subcontractor_Budget <small>.xlsx</small> | Budgets | 06/27/16   | jgreene    | <input type="checkbox"/> |

4. On the upload page, complete the form by filling in the **Title** and **Description** of the document then clicking the **Choose File** button and selecting the file to upload from your computer.
5. Click the **Upload Document** button.

1711-2481   Yes   \$1,500,000.00   \$976,811.96   164   328

| Contract # | Active | Allocations    | Reimbursements | Total Cases | Total Participants |
|------------|--------|----------------|----------------|-------------|--------------------|
| 1711-2481  | Yes    | \$1,500,000.00 | \$976,811.96   | 164         | 328                |

Upload New File

Agency: United Way  
Program: ECQ XX11-2481 United Way - Neighborhood Learning Network  
Fiscal Year: 16-17 (7/01/16 - 6/30/17)  
Module: Budgets #44358 (Approved On: 07/01/2016)

\* **Title**: Subcontractor Budget 8-1-18

\* **Description**: ABC Inc. Original Budget

\* File: 4035F7AA-9230-4E8B-...  
Size: 59 kb

**Upload Document**   Cancel