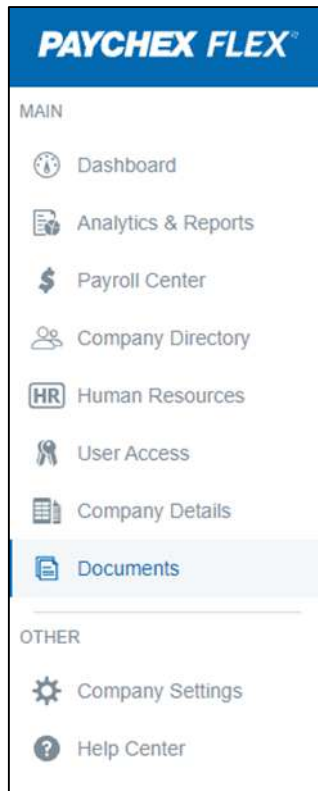


# Paychex Flex Document Management: How to Upload a Document

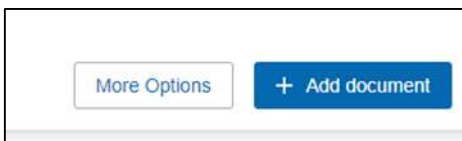
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1.) Go to Documents in PaychexFlex



## Add a Document

To add a document:



1. Click **Add Document**.
2. Click **browse** to locate the file you want to add. You can also drag and drop a file into the Upload area.


**Note:** You can upload multiple documents at once. When you select the *i*, next to the word Upload, information on the file size limits and acceptable file types display.

### Add Document

You can upload company documents that you can share to employees.

Upload

Upload ⓘ




Drag and drop a file here or [browse](#)

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To rename the document:

1. Click **Rename** to type the new name. This is optional.
2. Click **Save**.
3. Click the **X** to the right of Rename to remove a file you have uploaded in error.

### Upload File

 **NexGen EAP Flyer 2021.pdf**  
Ready to Upload Rename X

**Select what category to save this file to**

Category \*

\_\_\_\_\_ ▼

## Enter Metadata

Before we can upload the file, we must complete the associated metadata.

To set a Category for the document:

1. Select the **Category drop-down caret**.
2. From the pop-up window, select the appropriate category. Your file will now be attached to, and searchable by, this category.

You also have the option to request a legally binding e-signature, or a general acknowledgment, or neither.

**Always require an e-signature or acknowledgement?**

No

Require e-signature

Require acknowledgement

---

Share with groups ⓘ

+ Add Groups

Share with Individuals

+ Add Individuals

---

If desired, pick dates the file(s) is available.

📅 Start date \_\_\_\_\_ 📅 End date \_\_\_\_\_

### To set an expiration date for the document:

1. Click **Add expiration date**. This is optional.
2. Using the **calendar**, navigate to and click on the appropriate expiration date.
3. From the Set Reminder pop-up window, select an optional reminder for the expiration, if you'd like one. The default is Never.

To set permissions for document viewing:

Select the appropriate radio button to set permissions to view the document.

- If it's something that should only be viewable to admins, keep the default of *No, let only me and other admins with document permissions see this*.
- If you'd like to have employees view the file, but would like to set a date for availability, you can select a date (future or past) and the document will display in the selected employees' *My Documents* area.

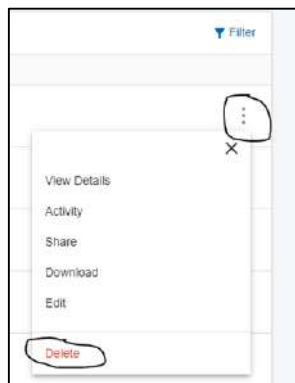
You can also share documents and select specific availability dates while uploading documents.

Click *More Options* to expand this area and to share the document. Select the appropriate availability dates.

## Delete a Document

You can delete documents from the People List or from Documents. From the People List, select the employee, then click **Documents**.

To delete a document, go to Documents.



1. Click the 3-dot options menu next to the document, and select Delete.
2. To confirm, click Delete again.

# Sharing Documents

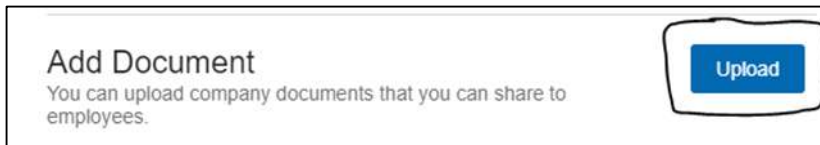
Administrative users may only share with individuals they have access to and based on sharing settings. You can set a start date and an end date for employee availability.

Click the **information circles** for more information on the specific task.

**Note:** Employees can set their preferences to get a notification when a document is shared with them. Note, that if a document is shared and then removed or unshared, the employee will still receive the notification saying the document is available even though it will not display for them.

## Upload the Document

After completing the metadata, click **Upload**.

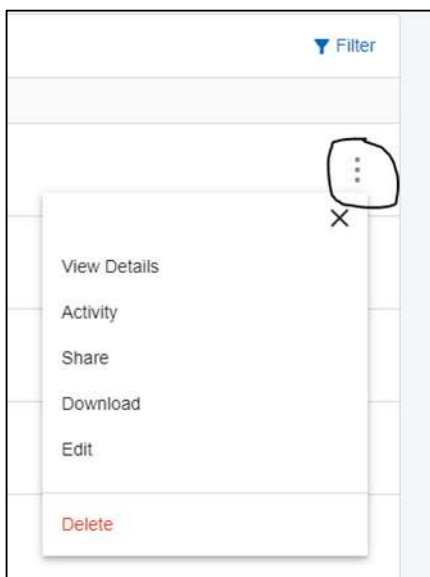


## Options Menu

Once the file is uploaded, there are several actions you can take by using the **Options Menu**.

Options include:

- Download
- Edit
- Delete
- Additional options for company Documents **only** (these options are not available in People):
  - Sharing (lets you modify the sharing capabilities you set when uploading the document)
  - Activity
  - View Details



In company Documents, you can click on a file to preview it or select **View Details** from the options menu. Once in the preview, you can magnify, navigate pages, download, or share. This feature is not available in People.