File Attachments

This feature is required to attach Files/Receipts in a main file. Attached Files/Receipt will move along with main file and there is provision to 'Detach' or 'Attach with Another File' attached File/Receipts at any point of time by providing mandatory remarks.

Attaching Files with main file

Important Points:

✓ Main file must be present in Inbox/Inbox Folder/Created/Parked List.

✓ File(s) to be attached must be present in Inbox/Inbox Folder/ Created list in standalone condition (Not attached with any other File).

✓ File in Parked/Closed/Submitted files for Closing or Reopening Approval/Approval request of file module will not be available for attachment

✓ Physical Files (Both main file and file to be attached) should be Received State in Inbox/Inbox Folder.

✓ File(s) to be attached must not have attached File/Receipt.

✓ File(s) to be attached must be of same nature (P/E) as of main File.

STEPS TO FOLLOW:

1. Click **Attach File** submenu under **Attach** menu in File Inner page to open file attachment page.
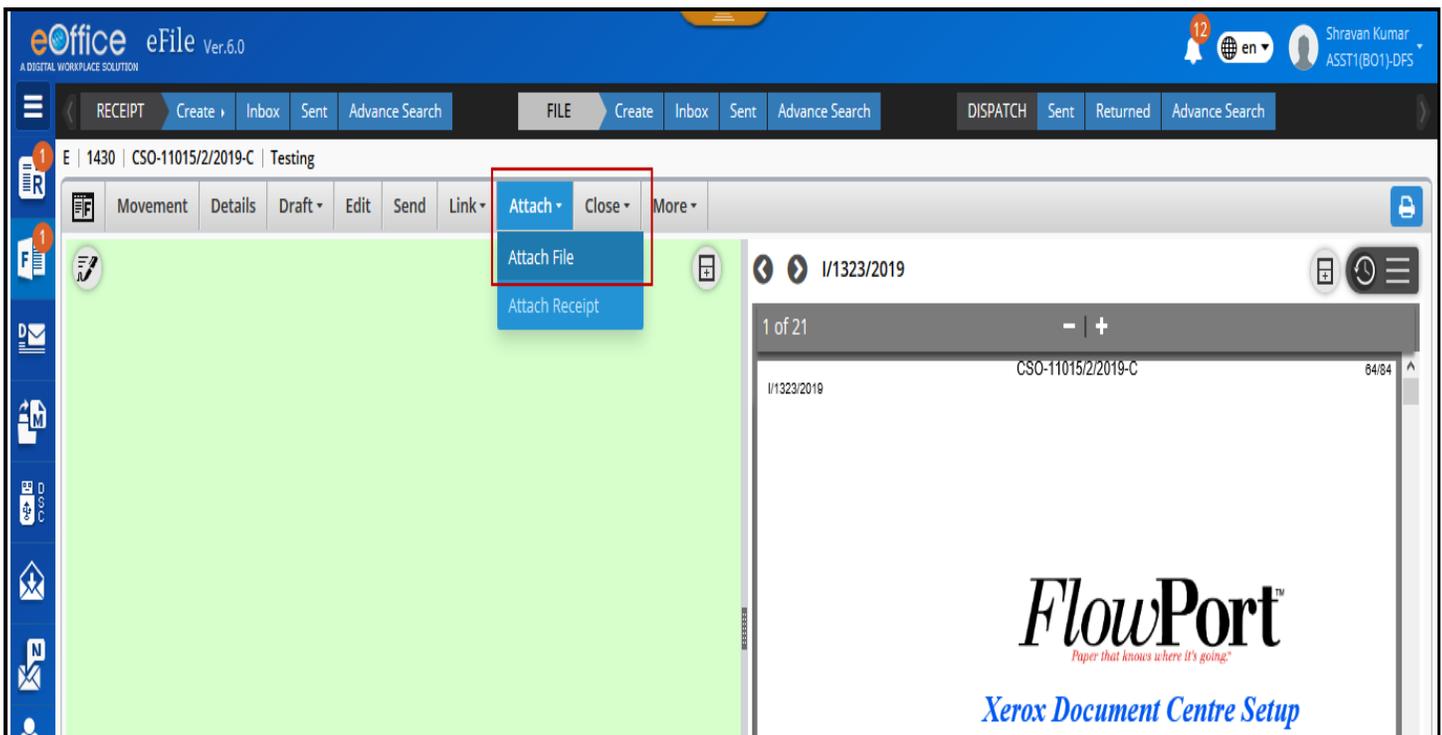

Figure 219

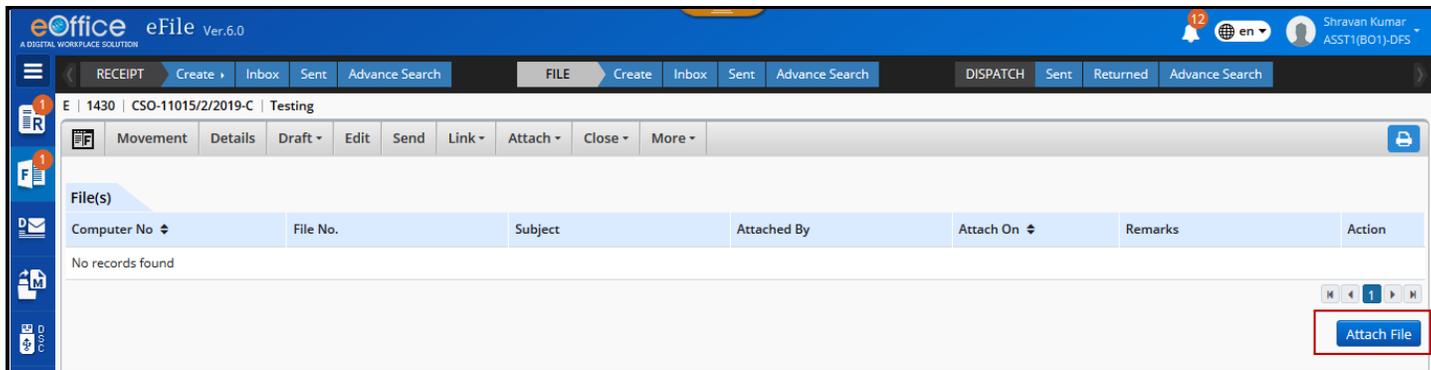2. Click **Attach File** action Button.

Figure 220

3. Select File(s) in Attach File pop up window showing year wise listing of File(s) (Inbox/Inbox Folder/Created) of same nature as of main file.
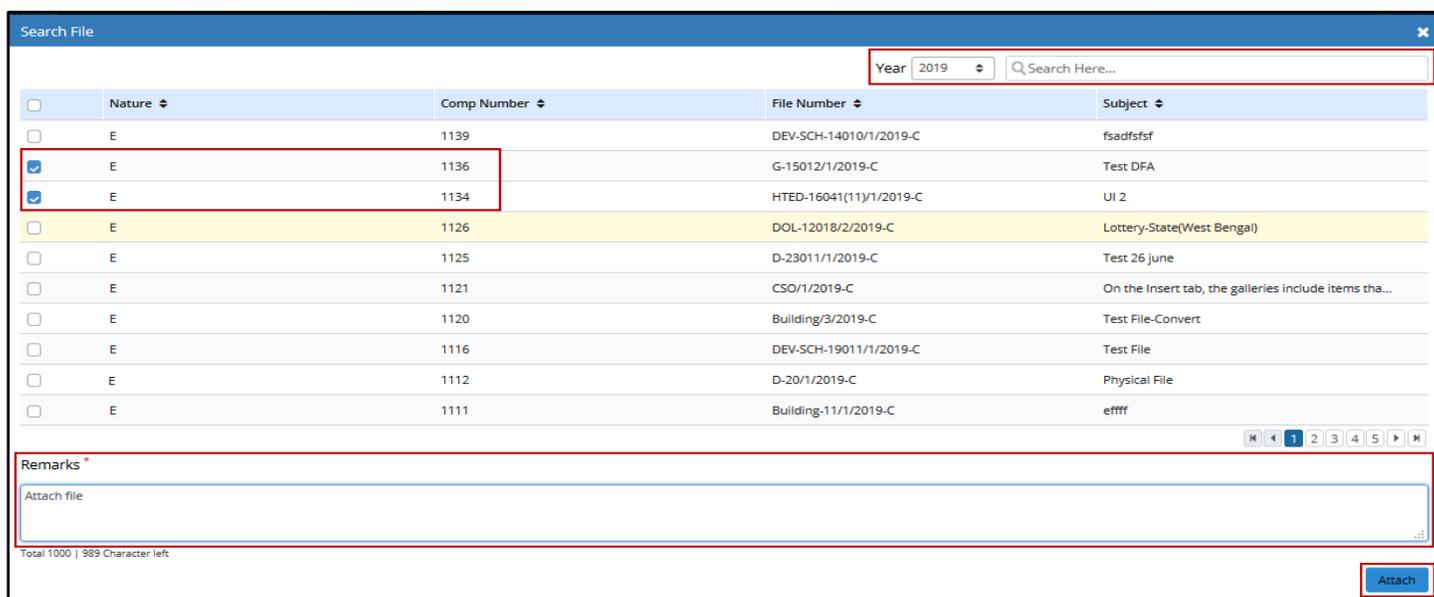

Figure 221

4. Enter mandatory **Remarks**.

5. Click **Attach** action button to attach selected File.

Note:

- Attached File(s) will be removed from its current location.
- Location of Attached File will be updated in the Advance Search of the Attached file.
- Attachment details will be maintained in the Attach File Page of the Main file and Attached/Detached Tab of File history in File Details page.
- Attachment details will also be displayed in Details of main File searched from Advance Search.
- File movement history of attached file should be updated with attachment information in Remark with every movement of main file (until detached).
- Option to **Detach**, **Attach with Another** and view Action Details of attached file should be displayed in File Attachment page.
- Attachment icon should be displayed, next to File no. in Inbox/Inbox Folders/Created/Parked list page.

Attaching Receipt with Main File

Important Points:

✓ Main File must be present in Inbox/Inbox Folder/Created/Parked List of the user.

✓ Receipt(s) to be attach must be present in Inbox/Inbox Folder/Created List in standalone condition (Not attached with any other Receipt).

✓ Note: Receipt in Closed folder will not be available for attachment.

✓ Main Physical file should be in received state.

✓ Physical Receipt to be attached should be in received state.

✓ Receipt(s) to be attached must not have any attached File/Receipt.

✓ Receipt(s) to be attached must be of same nature (P/E) as of main File.

STEPS TO FOLLOW:

1. Click **Attach Receipt** submenu under **Attach** menu in File Inner page to open file attachment page.
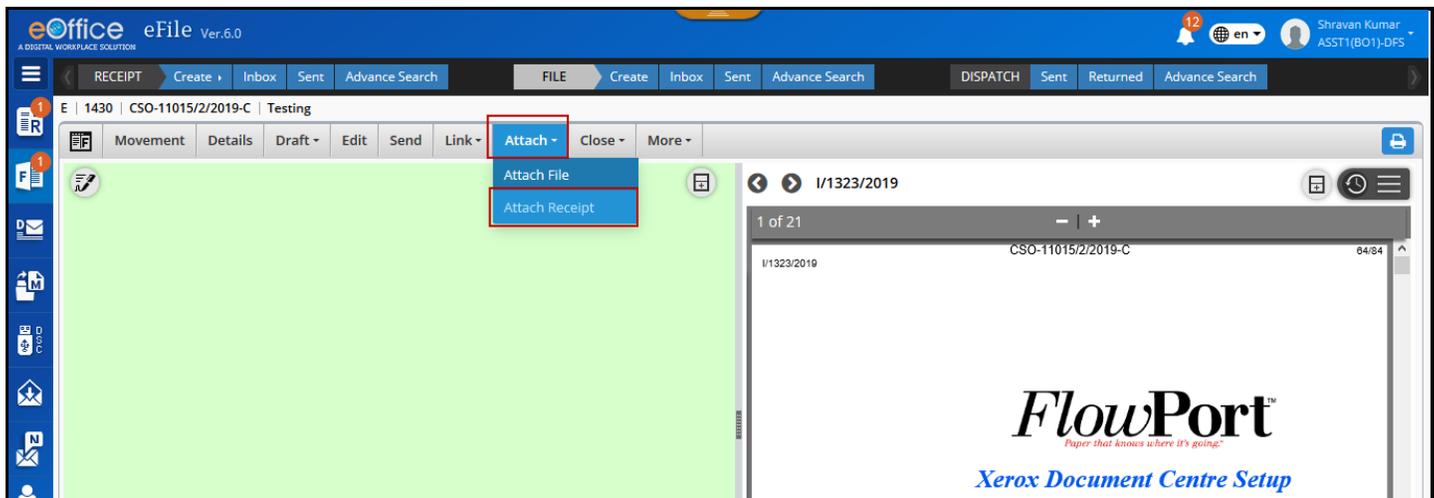

Figure 222

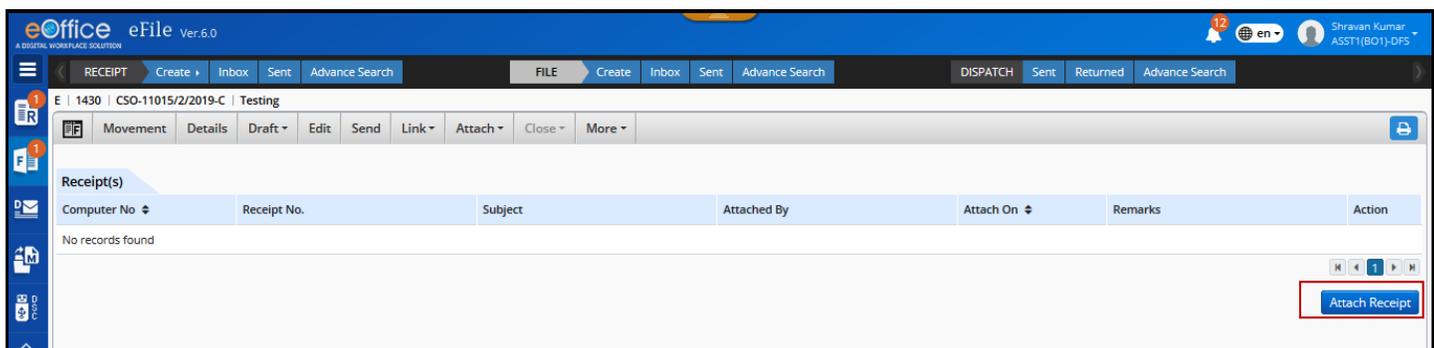2. Click **Attach Receipt** action button.

Figure 223

3. Select Receipt(s) from the pop up window showing year wise listing of Receipt(s) (Inbox/Inbox Folder/Created) of same nature as of main file.

Figure 224

4. Enter Remarks and click **Attach** to attach selected File.

Note:

- Attached Receipt(s) will be removed from its current location.
- Location of Attached Receipt will be updated in the Advance Search of the Attached Receipt.
- Attachment details will be maintained in the Attach Receipt Page of the Main file and Attached/Detached Tab of File history in File Details page.
- Attachment details will also be displayed in Details of main File searched from Advance Search.
- Receipt movement history of attached receipt will be updated with attachment information in Remark with every movement of main file (until detached).
- Option to **Detach**, **Attach with Another** and view Action Details of attached receipt will be displayed in file attachment page.
- Attachment icon will be displayed next to File no. in Inbox/Inbox Folders/Created/Parked list page.