

# **Paperclip Attachments User Guide**



### **Rights to the contents of this document**

All rights reserved. Information contained in this document is Copyright and proprietary to Infor Public Sector and may be used or disclosed only with written permission from Infor Public Sector.

This document or any part thereof may not be reproduced in any way without the written permission of Infor Public Sector.

### **Feedback**

Your suggestions and comments regarding this documentation are highly regarded. Please send or fax any suggestions to your Infor Public Sector office – [lghelpdesk@infor.com](mailto:lghelpdesk@infor.com).

#### **SOUTH AUSTRALIA**

PO Box 360  
Goodwood SA 5034  
Tel: +61 8 8372 6111  
Fax: +61 8 8372 6199

#### **NEW SOUTH WALES**

Level 3,  
40 Miller Street  
North Sydney, NSW 2060  
Tel: +61 2 9021 7100  
Fax: +61 2 9021 7298

#### **NEW ZEALAND**

Infor Public Sector NZ  
93 Grafton Road  
PO Box 2733  
Auckland, NZ  
Tel: +64 9 309 1860  
Fax: +64 9 356 1860

#### **VICTORIA**

Level 8, 1 Southbank Blvd  
Southbank, Vic 3006  
Tel: +61 3 8608 8500  
Fax: +61 3 8608 8599

#### **QUEENSLAND**

Level 13, 50 Cavill Avenue  
Surfers Paradise, QLD 4217  
Tel: +61 7 5635 4344

### ***Pathway 3.09 (Thick Client Version)***

Copyright © 2014 Infor.

All rights reserved. The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other trademarks listed herein are the property of their respective owners. [www.infor.com](http://www.infor.com).

## Table of Contents

### PAPERCLIP ATTACHMENTS USER GUIDE

OVERVIEW .....	1
MAINTENANCE .....	3
File Extension Maintenance .....	5
File Path Maintenance.....	6
Attachment Entity Maintenance .....	7
Attachment Type Maintenance.....	9
Attachment Link Maintenance .....	13
BATCH PROCESSING .....	14
Attachment Links Global Update .....	16
Including Paperclip Attachments as Document Extracts.....	18
Attachment Links Bulk Import.....	19

# Overview

Paperclip Attachments are provided throughout all Pathway Modules. This function will allow documents, images, objects to be link to a Pathway Entity and be viewed from within Pathway.

The attached objects can be readily accessed/viewed from the Summary Forms, by selecting the Paperclip Icon that appears at the top of screen. The ability to link an object via the Paperclip function is more streamlined that using Memos.

In addition by utilising the paperclip function to hold attachments, we will be able to provide the ability to include these into Certificates, Notices and Letters via Extract and Merge Types as well as have them registered within Document Management Systems where applicable.

## Maintenance

The following topics are included in this section:

[File Extension Maintenance](#)

[File Path Maintenance](#)

[Attachment Entity Maintenance](#)

[Attachment Type Maintenance](#)

## File Extension Maintenance

### File Extension Maintenance Form

Extension	Description	Active
BMP	Bitmap Image	<input checked="" type="checkbox"/>
DOC	Word Document	<input checked="" type="checkbox"/>
GIF	GIF Image	<input checked="" type="checkbox"/>
HTM	HTML Document	<input type="checkbox"/>
JPEG	JPEG Image	<input checked="" type="checkbox"/>
JPG	JPEG Image	<input checked="" type="checkbox"/>
PDF	PDF Document	<input checked="" type="checkbox"/>
TXT	Text File	<input checked="" type="checkbox"/>
XML	XML Document	<input type="checkbox"/>

*File Extension Maintenance*

This Form will display the File Extension Code and Descriptions that will be available for linking as a Paperclip Attachment.

**Extension**

Enter the File Extension that is required for storing documents

**Description**

Enter a Description for the File Extension that readily identifies the File Type Extension

**Active**

The Active flag will be checked on where a record is to be available to users within Pathway. If this parameter is not checked on this file Type extension will not be available for selection against an Attachment Type.



# File Path Maintenance

## File Path Maintenance Form

The File Path Maintenance Form allows users to predefine the paths where the paperclip attachments will reside. Multiple Paths can be nominated. These paths are then attached to the Attachment Type and can be set as the only applicable path for that attachment type.

Path	Active
\\adeausfil01\users	<input checked="" type="checkbox"/>
\\adeauslgo02\Redev\Pathway\Dev\exp	<input type="checkbox"/>
\\adeauslgo02\Redev\Pathway\Dev\tmp	<input checked="" type="checkbox"/>
\\adeauslgo02\Redev\Pathway\Dev\xxx	<input checked="" type="checkbox"/>
c:\temp	<input checked="" type="checkbox"/>

Insert OK Cancel

*File Path Maintenance Form*

### Path

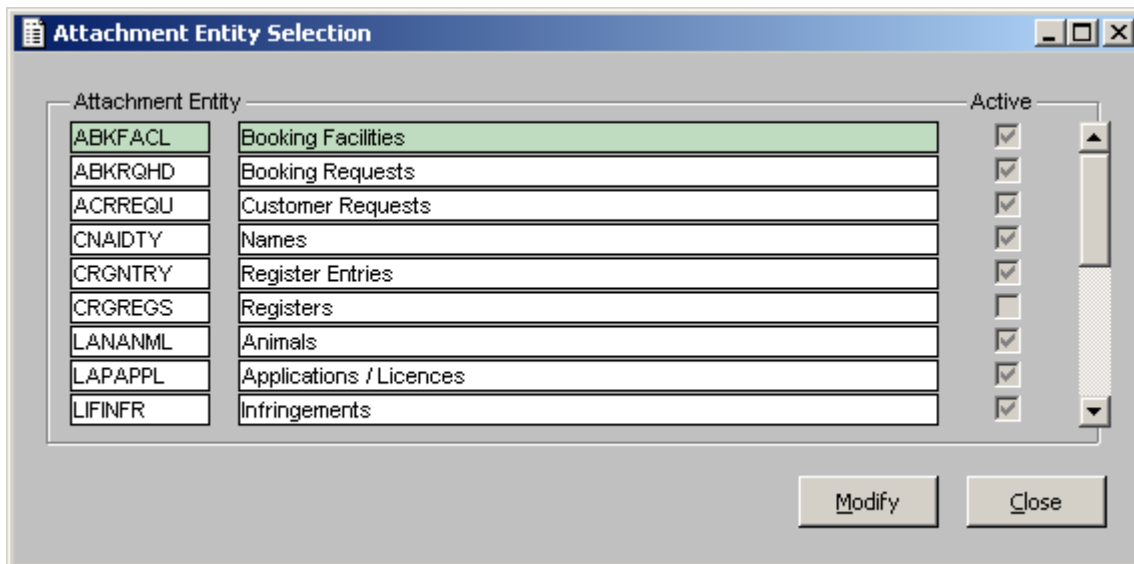
It is expected that users will enter the path where images are stored by council. It may be applicable to enter a different mapped path for each Pathway Module. Both UNC and direct path mappings are supported.

### Active

Where a Path is flagged as active, this will be available for selection against an Attachment Type. Those Paths that are not active will not be available for selection.

## Attachment Entity Maintenance

### Attachment Entity Selection Form



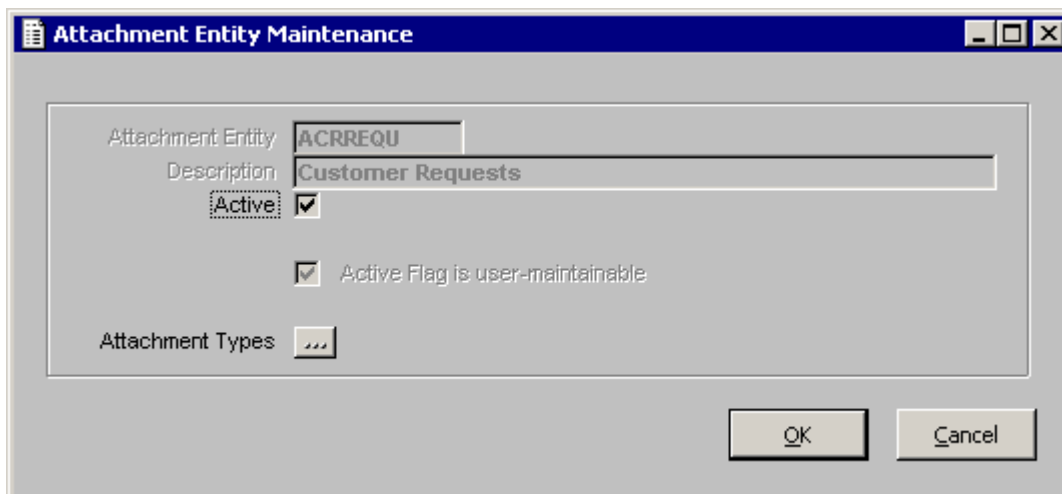
The screenshot shows a window titled "Attachment Entity Selection". It contains a table with two columns: "Attachment Entity" and "Active". The table lists several entities, with "ABKFACL" (Booking Facilities) selected. Below the table are "Modify" and "Close" buttons.

Attachment Entity	Active
ABKFACL	<input checked="" type="checkbox"/>
ABKRQHD	<input checked="" type="checkbox"/>
ACRREQU	<input checked="" type="checkbox"/>
CNAIDTY	<input checked="" type="checkbox"/>
CRGNTRY	<input checked="" type="checkbox"/>
CRGREGS	<input type="checkbox"/>
LANANML	<input checked="" type="checkbox"/>
LAPAPPL	<input checked="" type="checkbox"/>
LIFINFR	<input checked="" type="checkbox"/>

*Attachment Entity Selection Form*

This Form will display the Entities that are available for use with Paperclip attachments. Select the Entity that you wish to configure for use and click on Modify which will take you to the Attachment Entity Maintenance Form

### Attachment Entity Maintenance Form



The screenshot shows a window titled "Attachment Entity Maintenance". It contains a form with the following fields: "Attachment Entity" (set to "ACRREQU"), "Description" (set to "Customer Requests"), "Active" (checked), "Active Flag is user-maintainable" (checked), and "Attachment Types" (set to "..."). Below the form are "OK" and "Cancel" buttons.

*Attachment Entity Maintenance Form*

### Attachment Entity

The Attachment Entity code as per the selection from the front screen will be displayed here.

**Description**

The description for the Attachment Entity code as per the selection from the front screen will be displayed here.

**Active**

This field will indicate if this is an active record.

**Attachment Types**

Selection of the Attachment Types Detail button will take you to the Entity Attachment Types Maintenance Form. This form will then allow you to nominate the Attachment Types that are available for the selected entity.

**Entity Attachment Types Form**

Entity Attachment Types Maintenance				
Attachment Entity	ACRREQU	Customer Requests		
<b>Available</b>		<b>Assigned</b>		
Animal - Puppies	→	Customer Request Attachment	Default	Active
Application / Licence Attachment			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Property Plan	←			
OK Cancel				

*Entity Attachment Types Maintenance*

**Available**

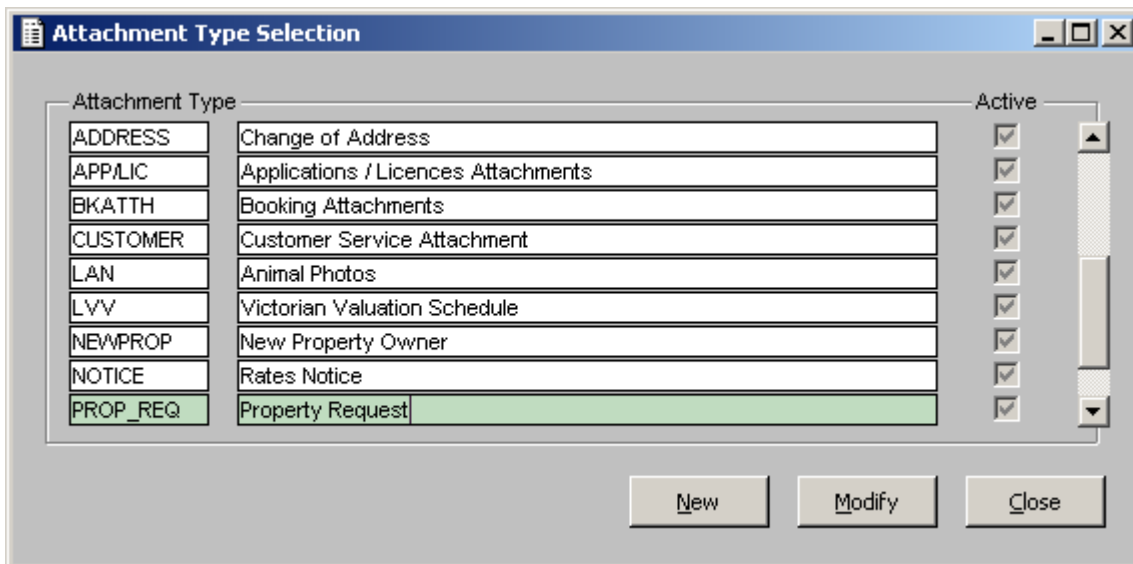
A list of all available Attachment Types will appear here. Use the move buttons in the middle of the screen to assign those Attachment Types for this Attachment Entity.

**Assigned**

This will display all of the assigned Attachment Types for this Attachment Entity. Only one Attachment Type may be set as Default at any one time. Those Attachment Types that are flagged as active will be available for use within the relevant Pathway Module.

## Attachment Type Maintenance

### Attachment Type Selection Form



The screenshot shows a window titled "Attachment Type Selection". It contains a table with two columns: "Attachment Type" and "Active". The table lists several attachment types, with "PROP\_REQ" (Property Request) highlighted in green. To the right of the table is a vertical scrollbar. Below the table are three buttons: "New", "Modify", and "Close".

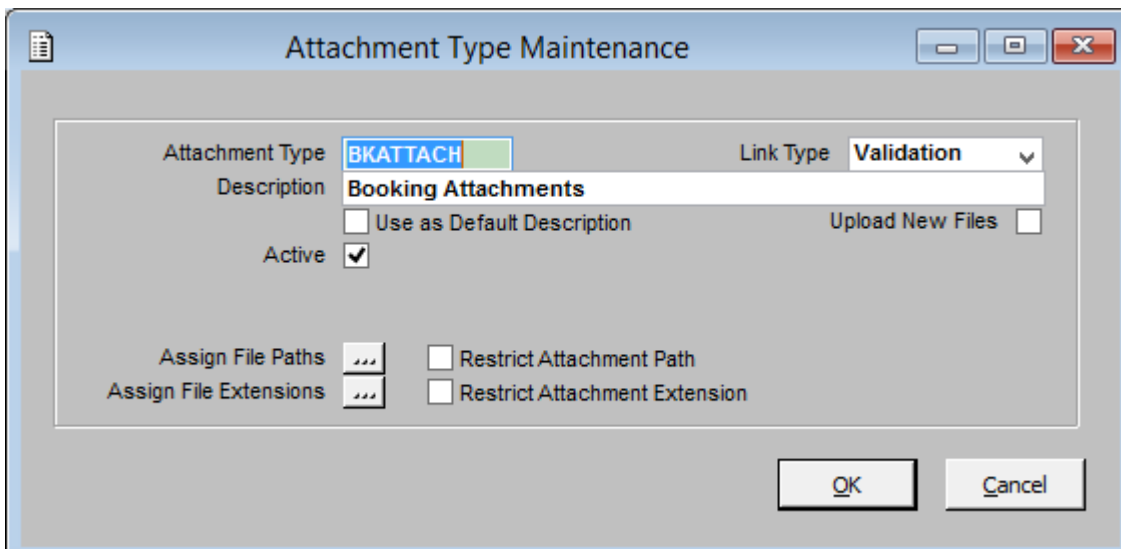
Attachment Type		Active
ADDRESS	Change of Address	<input checked="" type="checkbox"/>
APP/LIC	Applications / Licences Attachments	<input checked="" type="checkbox"/>
BKATTH	Booking Attachments	<input checked="" type="checkbox"/>
CUSTOMER	Customer Service Attachment	<input checked="" type="checkbox"/>
LAN	Animal Photos	<input checked="" type="checkbox"/>
LVV	Victorian Valuation Schedule	<input checked="" type="checkbox"/>
NEWPROP	New Property Owner	<input checked="" type="checkbox"/>
NOTICE	Rates Notice	<input checked="" type="checkbox"/>
PROP_REQ	Property Request	<input checked="" type="checkbox"/>

*Attachment Type Selection Form*

This form will display and existing Attachment Types and allow for the addition of new attachment types. It is suggested that each module have a separate set of attachment types for easy identification.

Click on New to create a new attachment type or modify to alter an existing record.

### Attachment Type Maintenance Form



The screenshot shows a window titled "Attachment Type Maintenance". It contains a form with the following fields and controls:

- Attachment Type:** A text box containing "BKATTACH".
- Description:** A text box containing "Booking Attachments".
- Link Type:** A dropdown menu set to "Validation".
- Use as Default Description:** A checkbox that is unchecked.
- Upload New Files:** A checkbox that is unchecked.
- Active:** A checkbox that is checked.
- Assign File Paths:** A button with three dots.
- Assign File Extensions:** A button with three dots.
- Restrict Attachment Path:** A checkbox that is unchecked.
- Restrict Attachment Extension:** A checkbox that is unchecked.

At the bottom right are two buttons: "OK" and "Cancel".

### *Attachment Type Maintenance Form*

#### **Attachment Type**

The Attachment Type code as selected from the initial screen. If in new mode, then enter the Attachment Type required.

#### **Link Type**

The Link Type can be set to the following values:-

- Validation: The Attachment Path on the PaperClip attachment is validated – this replicates previous functionality. This is the default for any new Attachment Type that is added.
- No Validation: The Attachment Path on the PaperClip attachment is not validated.
- Link to DME: This setting is for use by Rodney District Council. A document number will be entered into the Attachment Path on the PaperClip attachment - the Attachment Path is not validated.

#### **Description**

The Description for the Attachment Type Code

#### **Active**

This flag will indicate if this record is active. If the checkbox is ticked on then this records will be available for selection within the Pathway modules.

#### **Upload New Files**

This field is only applicable for the smart client. When the option is checked a files accessible to the client can be selected, and automatically uploaded to the default file path.

#### **Link Executable**

This field is only applicable when the Link Type is set to Link to DME. This executable is used in conjunction with the document number in the Attachment's Attachment Path to open the document.

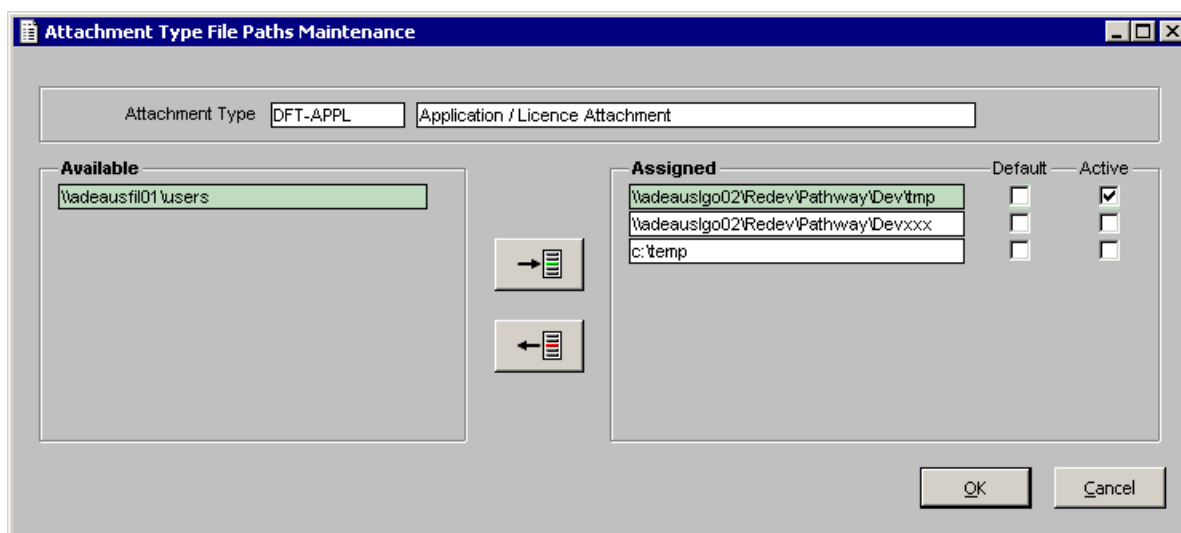
#### **Restrict attachment Path**

This parameter allows council to nominate the path(s) where the attachments will reside. This will allow council to only attach to documents/objects that reside in the nominated directory. The paths available for selection must have been pre-defined within the File Path Maintenance Option.

### **Attachment File Paths Maintenance Form**

This form allows user to nominate the required file paths that this Attachment Type will be restricted to. In the above example, when using the paperclip attachment, the attachments will need to reside in the [\\adeauslgo02\redev\pathway\dev\tmp](#) directory. The users will not be able to attach any objects that do not reside in this exact file path.

Multiple paths may be nominated and active at any one time.



The screenshot shows the 'Attachment Type File Paths Maintenance' dialog box. At the top, 'Attachment Type' is set to 'DFT-APPL' and the description is 'Application / Licence Attachment'. Below this, there are two main sections: 'Available' and 'Assigned'. The 'Available' section contains a single entry: '\Vadeausfil01\users'. The 'Assigned' section contains three entries: '\Vadeauslgo02\Redev\Pathway\Dev\tmp', '\Vadeauslgo02\Redev\Pathway\Devxxx', and 'c:\temp'. Each entry in the 'Assigned' section has two checkboxes: 'Default' and 'Active'. The 'Active' checkbox for the first entry is checked. Between the two sections are two arrows: a right-pointing arrow with a list icon and a left-pointing arrow with a list icon. At the bottom right are 'OK' and 'Cancel' buttons.

Available	Assigned	Default	Active
\Vadeausfil01\users	\Vadeauslgo02\Redev\Pathway\Dev\tmp	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	\Vadeauslgo02\Redev\Pathway\Devxxx	<input type="checkbox"/>	<input type="checkbox"/>
	c:\temp	<input type="checkbox"/>	<input type="checkbox"/>

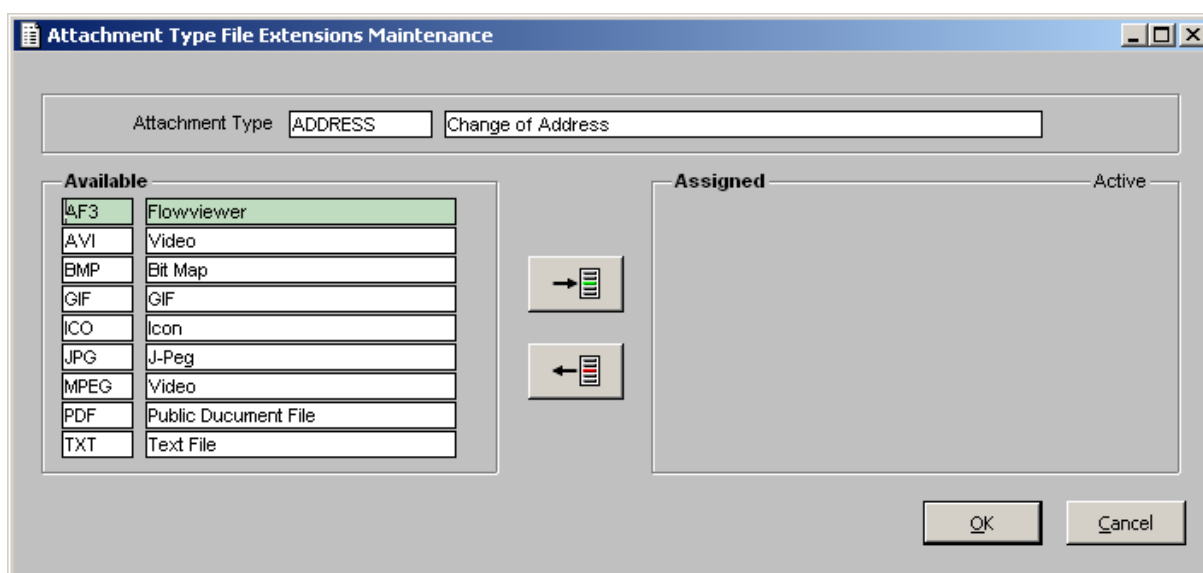
Attachment File Paths Maintenance Form

## Restrict Attachment Extension

### Attachment file Extensions Maintenance Form

This form allows user to nominate the Attachment File Extensions that this Attachment Type will be restricted to. In the above example, when using the paperclip attachment, the attachments will need to have the extension of BMP, DOC, PDF or TXT for the attachment to be successful.

The extension types available must have been predefined in the File Extension Maintenance option.



The screenshot shows the 'Attachment Type File Extensions Maintenance' dialog box. At the top, 'Attachment Type' is set to 'ADDRESS' and the description is 'Change of Address'. Below this, there are two main sections: 'Available' and 'Assigned'. The 'Available' section contains a list of file extensions: .F3, .AVI, .BMP, .GIF, .ICO, .JPG, .JPEG, .PDF, and .TXT, each with its corresponding file type (e.g., Flowviewer, Video, Bit Map, GIF, Icon, J-Peg, Video, Public Document File, Text File). The 'Assigned' section is currently empty. Between the two sections are two arrows: a right-pointing arrow with a list icon and a left-pointing arrow with a list icon. At the bottom right are 'OK' and 'Cancel' buttons.

Available	Assigned	Active
.F3 Flowviewer		
.AVI Video		
.BMP Bit Map		
.GIF GIF		
.ICO Icon		
.JPG J-Peg		
.JPEG Video		
.PDF Public Document File		
.TXT Text File		

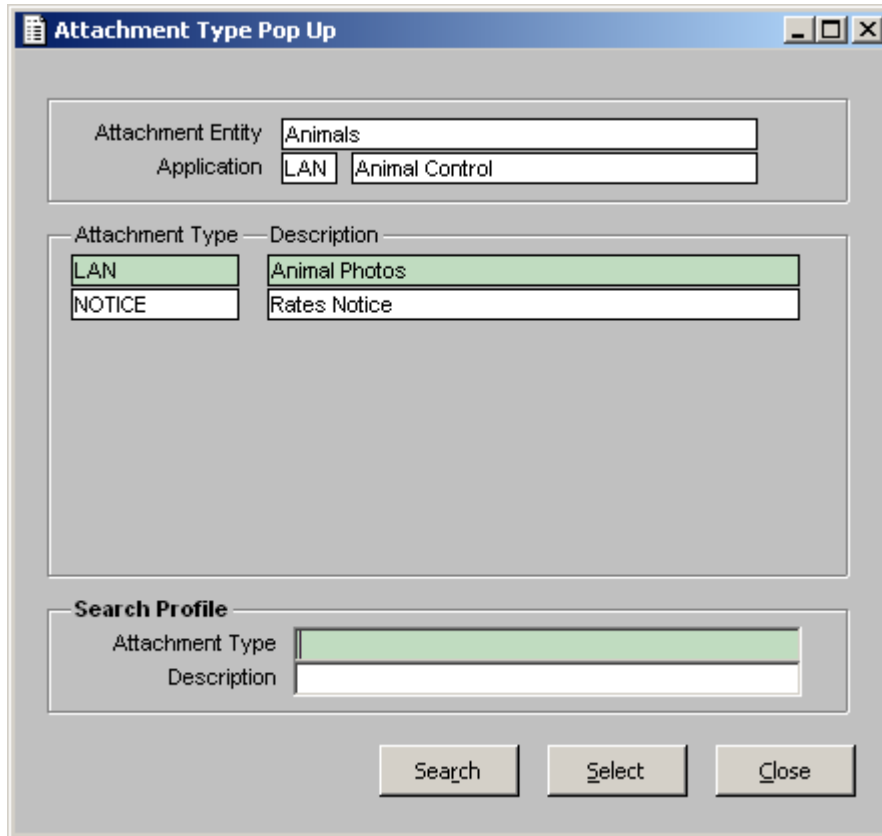
Attachment File Extensions Maintenance Form

### Use Description as Default

If this parameter is checked on, then the Description field on this form will be used as the Default description for all Paperclip attachments of this Attachment Type. If this parameter is not checked on, then the Description field will be blank when performing the attachment and the user can then type in any description text.

## Attachment Type Pop Up form

The Attachment Type Pop up form allows selection of an existing PaperClip Attachment Type. (This form is currently used in Animal Parameters for the authorised function of 'NZ National Dog Database'.)



The screenshot shows a Windows-style dialog box titled "Attachment Type Pop Up". It contains several input fields and a table. At the top, there are fields for "Attachment Entity" (containing "Animals") and "Application" (containing "LAN" and "Animal Control"). Below these is a table with two columns: "Attachment Type" and "Description". The table has two rows: one with "LAN" and "Animal Photos", and another with "NOTICE" and "Rates Notice". At the bottom, there is a "Search Profile" section with fields for "Attachment Type" and "Description". At the very bottom are three buttons: "Search", "Select", and "Close".

Attachment Type	Description
LAN	Animal Photos
NOTICE	Rates Notice

*Attachment Type Pop Up form*

### Attachment Entity

This field shows the entity to which the Attachment Types apply.

### Application

These fields show the code and description for the application to which the Attachment Types apply.

### Attachment Type/Description

These fields show the attachment type and description for the attachment types that can be selected.

### Search Profile – Attachment Type/Description

These fields allow for the entry of part or full Description for searching upon. Once details entered, the Search button should be selected to proceed with the Search.

# Attachment Link Maintenance

## Attachment Link Maintenance Form

Attachment Type	Description	Attachment Path/File Name
DME	DME Link	555
NOVAL	No Validation	c:\xxx\document.doc
TRIM	Trim Validated	C:\receiving spec 00013976.DOC

Buttons: Open, Insert, OK, Cancel

*Attachment Link Maintenance*

This Form will display the Attachment Type, Description and Attachment Path/File Name for linked Paperclip Attachments.

### Attachment Type

The functionality that occurs when an attachment is added will depend upon the setting of the Link Type of the Attachment Type chosen by the user, as follows:-

Validation: The Attachment Path on the PaperClip attachment is validated – this replicates previous functionality.

No Validation: The Attachment Path on the PaperClip attachment is not validated. This will allow entry of any information into the Attachment Path eg html and there will be no validation of this information.

Link to DME: A document number will be entered into the Attachment Path on the PaperClip attachment - the Attachment Path is not validated.

### Description

The description will be defaulted if a Default Attachment Type has been defined for the module. It can be overridden if required. Note, that if the Description is changed, it will not be reflected in any associated Document Management product.

### Attachment Path\File Name

The functionality that occurs when an attachment is added will depend upon the setting of the Link Type of the Attachment Type chosen by the user, as follows:-

Validation: The Attachment Path on the PaperClip attachment is validated – this replicates previous functionality.

No Validation: The Attachment Path on the PaperClip attachment is not validated. This will allow entry of any information into the Attachment Path eg html and there will be no validation of this information.

Link to DME: A document number will be entered into the Attachment Path on the PaperClip attachment - the Attachment Path is not validated.

Pressing the Open button will open the attachment. If the attachment is for a Link Type of Validation or No Validation it will open the attachment – if the Attachment Path is for a URL it will execute the URL. If the attachment is for a Link Type of Link to DME the document will be opened using the Link Executable of the Attachment Type.



## Batch Processing

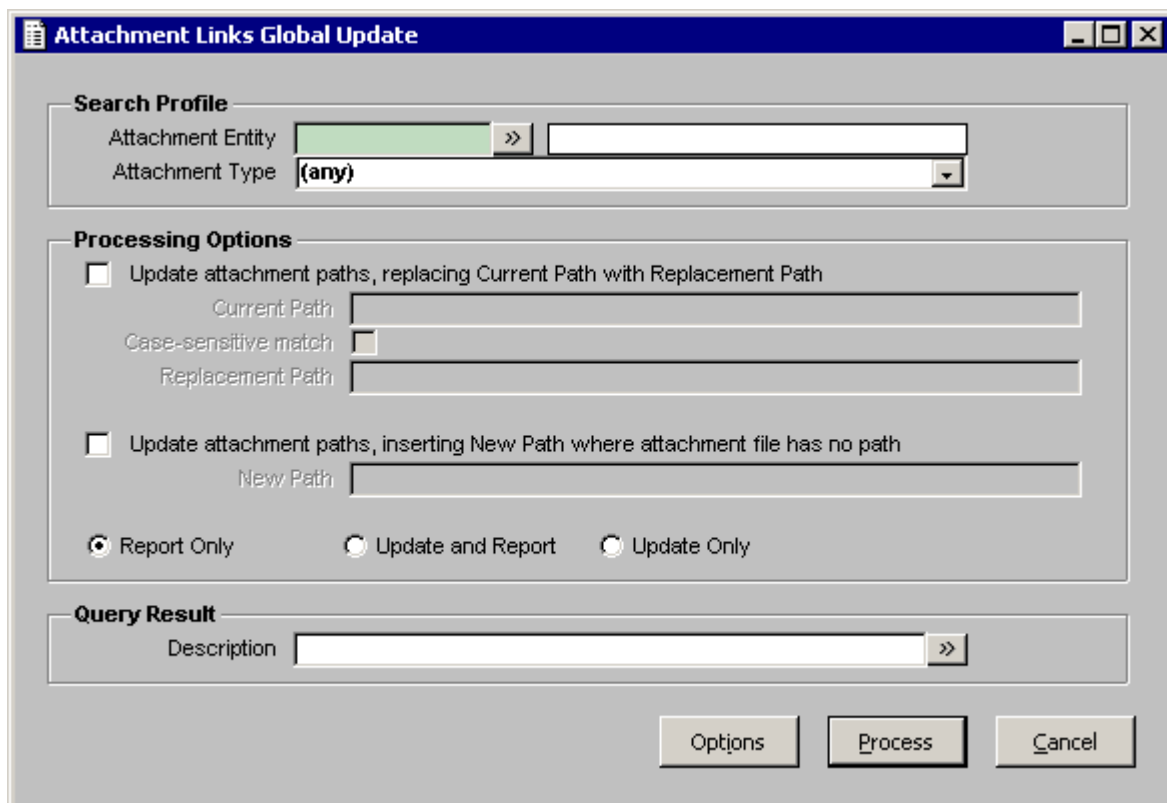
The following topics are included in this section:

[Attachment Links Global Update  
Including Paperclip Attachments  
Attachment Links Bulk Import](#)

# Attachment Links Global Update

## Attachment Links Global Update Form

The Attachment Links Global update has been created to assist with the bulk re-allocation of file paths for Paperclip Attachments. This may be necessary when council copies details from the production to training environments

The image shows a software window titled "Attachment Links Global Update". It contains several sections: "Search Profile" with fields for "Attachment Entity" (a text box with a green highlight and a right-pointing arrow) and "Attachment Type" (a dropdown menu showing "(any)"); "Processing Options" with two checkboxes. The first checkbox is "Update attachment paths, replacing Current Path with Replacement Path", followed by "Current Path" (text box), "Case-sensitive match" (checkbox), and "Replacement Path" (text box). The second checkbox is "Update attachment paths, inserting New Path where attachment file has no path", followed by "New Path" (text box). Below these are three radio buttons: "Report Only" (selected), "Update and Report", and "Update Only". The "Query Result" section has a "Description" text box with a right-pointing arrow. At the bottom right are three buttons: "Options", "Process", and "Cancel".

*Attachment Links Global Update Form*

### Search Profile - Attachment Entity

Type in the Name of the Attachment Entity or use the popup button to select the required entity. Leave blank to select ALL Entities.

### Search Profile - Attachment Type

Leave at the default of ANY to select ALL attachment types for the entity selection. Use the drop down list to select a specific Attachment Type to perform the Global update over.

### Processing Options - Update Attachment paths, replacing current path with Replacement Path

Nominate the current path for your Attachment Entity Selection.

### Case Sensitive Match

Nominate whether a case sensitive match on the file path is required.

### Replacement Path

Nominate the Replacement Path that is to be used in each instance with the current path is located.

**Processing Options - Update Attachment paths, inserting New Path where attachment has no path****New Path**

Nominate the New file path to be created for any attachments that currently point to a directory structure that no longer exists.

**Query Result - Description**

Enter the Description of your pre-defined Query Result or use the popup to select from the list.

# Including Paperclip Attachments as Document Extracts

In addition to being able to attach an image to an entity, we have also introduced the ability to include this image as part of a Pathway Generated Document. This is done using a specific Extract List type.

## Available Extract Lists

Each Module has a specific Extract List Type that has been created to facilitate the inclusion of the Paperclip Attachment image within a document.

Extract Lists are as follows:

ANML_ATT	Animal Attachments
APPL_ATT	Application Attachments
ASSM_ATT	Rates Assessment Attachments
INFR_ATT	Infringement Attachments
LDR_ATT	Debtor Assessment Attachments
LLC_ATT	Licence Attachments
LTW_ATT	Trade Waste Assessment Attachments
NTRY_ATT	Register Entry Attachments
PROP_ATT	Property Attachments
REQU_ATT	Request Attachments
VALU_ATT	Valuation Attachments

## Creating a New Extract Type for Paperclip Attachments

To create a new Extract Type you will need to have the following include statement within your extract.

- Access Extract Types in the required module, e.g. Property
- Click on New
- Select the appropriate Extract List from the selection above (PROP\_ATT)
- Detail out to open word and create the extract
- From the drop down list in Word select Insert
- Select Field
- From the list provided select 'Include Picture', click on OK
- This will place the include statement into your extract type
- Right click on the include statement and select Toggle Field Codes
- In front of the / insert the Attachment File merge field from the Pathway extract list provided
- Right click on select Toggle field Codes
- Click on the text Dummy record and right click and Toggle field codes again.
- Place double quotes around the extract field name "[MERGEFIELD Attachment\_File ]"

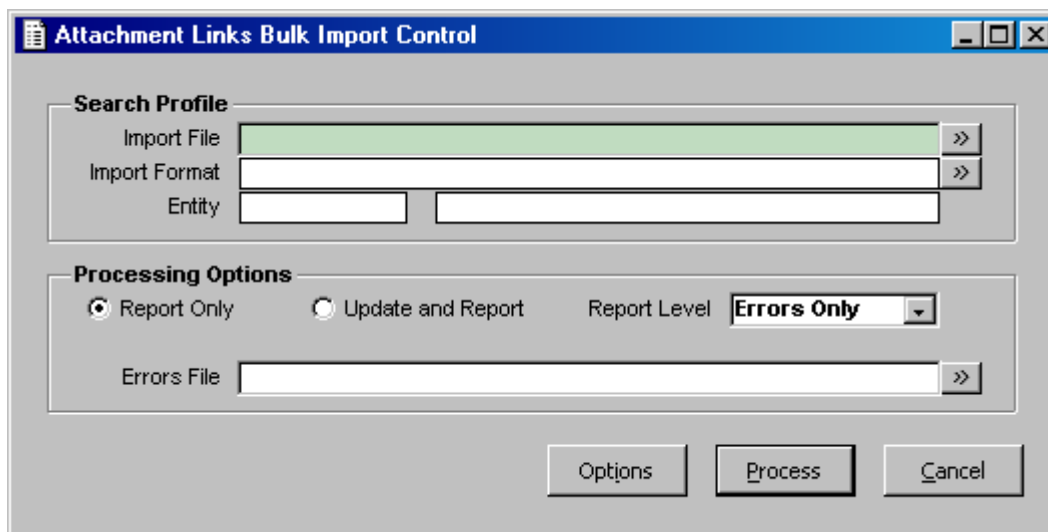
The extract is now complete.

Add this extract to your selected merge Type and the Attachment image will appear within your document.

You can also include the Attachment Description by using the same process.

## Attachment Links Bulk Import

A Menu option has been provided to enable council to Import Paperclip Attachment Links. This option will Import details into the CRPDC03 reporting entity which will in turn updated the required Paperclip Attachment Entities.



The dialog box titled "Attachment Links Bulk Import Control" contains two main sections. The "Search Profile" section includes fields for "Import File" (with a green selection bar and a right arrow), "Import Format" (with a white selection bar and a right arrow), and "Entity" (with two white input fields). The "Processing Options" section includes radio buttons for "Report Only" (selected) and "Update and Report", a "Report Level" dropdown menu set to "Errors Only", and an "Errors File" field with a right arrow. At the bottom are three buttons: "Options", "Process", and "Cancel".

*Attachment Links Bulk Import Control*

### Import File

An import file will need to be mapped to the fields available within this reporting entity. The required fields are as follows:

ENTITY	Pathway Module Entity eg LRAASSM
APPL	Pathway Application Code eg LRA
APPLTPK	Application TPK Value eg: Assessment TPK Value
APPLREF	Application Reference eg Assessment Number
ATTACHTYPE	Attachment Type Code eg ASSM
DESCR	Description of the Paperclip Attachment eg Assessment Attachment
ATTPATH	The Path of the document to be attached including the document name.

**\*\* NOTE:** Only the Application TPK OR the Application Reference may be included in the import file. For some modules such as property – the Application Reference would not be used.

The Entity will represent the module that the Paperclip attachment is to be linked to

Customer Requests	ACRREQU	ACR
Registers	CRGREGS	CRG
Animals	LANANML	LAN
Applications/Licensing	LAPAPPL	LAP/LLC
Infringements	LIFINFR	LIF
Property	LPAPROP	LPA
Rates/Debtors	LRAASSM	LRA/LDR
Trade Waste	LTWASSM	LTW
Victorian Valuations	LVVVALU	LVV
New Zealand Valuations	LVZVALU	LVZ

### Import Format

An Import format will need to be defined and the fields selected should match the field within your CSV file. The order of the fields must also match to ensure that the information is correctly populated into Pathway. On initial entry into this form, when the Import format option is taken, council will be taken to the Import/Export Maintenance form where the Import Format may be defined.

Enter a Description and Import file location and apply the required fields.

### Processing Options

The import can be firstly performed in Report Only mode to see if there are any errors prior to running the import in update Mode,

There are two levels of reporting available

Errors Only	Which will report only the errors encountered
Detailed	Which will include both successfully imported and errors encountered.

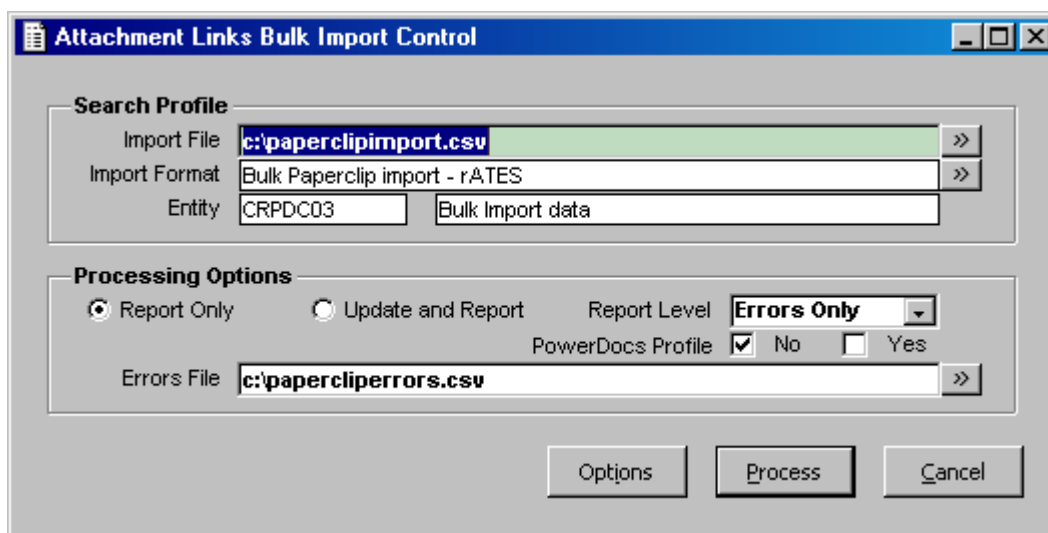
### Errors File

The Errors file will require a valid file path and name to be entered. This file will capture those records in error.

The purpose of the error file is that this file can then be corrected and used for import. This will remove the need for the customer to remove the correctly imported records from the original import file and avoid possible duplicates being processed.

### PowerDocs

**\*\* Toowoomba City Council \*\***



The image shows a Windows-style dialog box titled "Attachment Links Bulk Import Control". It contains two main sections: "Search Profile" and "Processing Options".

**Search Profile:**

- Import File:  with a browse button (two right-pointing arrows).
- Import Format:  with a browse button.
- Entity:  and .

**Processing Options:**

- Report Only: ☒ (selected)
- Update and Report: ☐
- Report Level:  (dropdown menu)
- PowerDocs Profile: ☒ No ☐ Yes
- Errors File:  with a browse button.

At the bottom are three buttons: "Options", "Process", and "Cancel".

Where Power Docs Document Management System is in use, an additional check box will be available on the control form for council to advise whether these attachments are to be profiled as part of the import. Where you have the situation where some will be profile an some will not, this will need to be performed in two imports.