Paperclip Attachments User Guide

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.

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Pathway 3.09 (Thick Client Version)

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PAPERCLIP ATTACHMENTS USER GUIDE

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 Extension Maintenance Form

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.
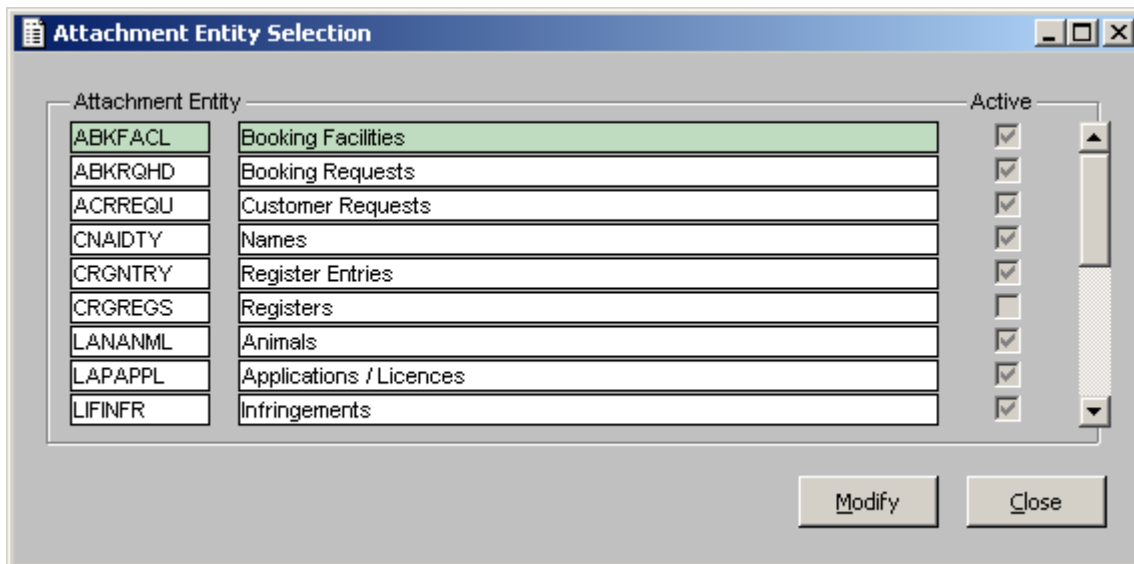

File Path Maintenance Form

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.

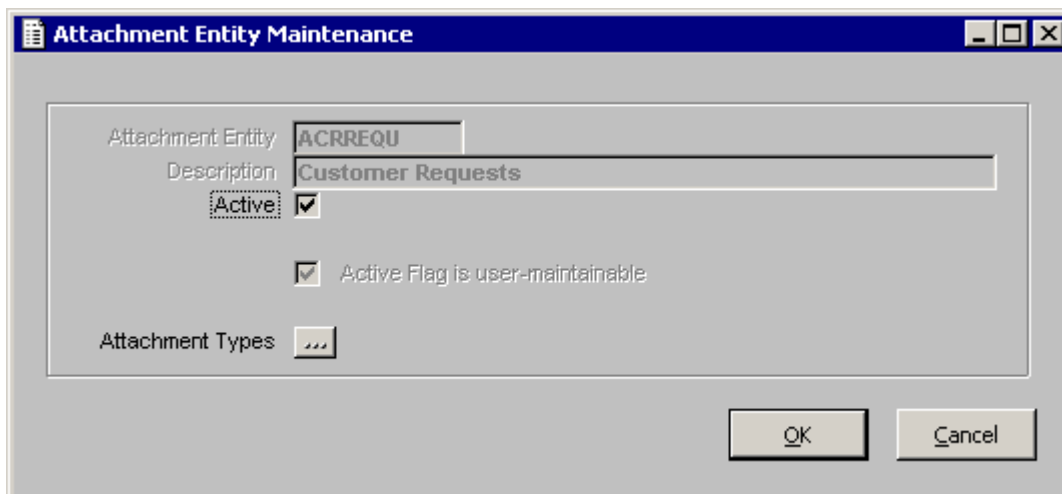# Attachment Entity Maintenance

Attachment Entity Selection Form

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

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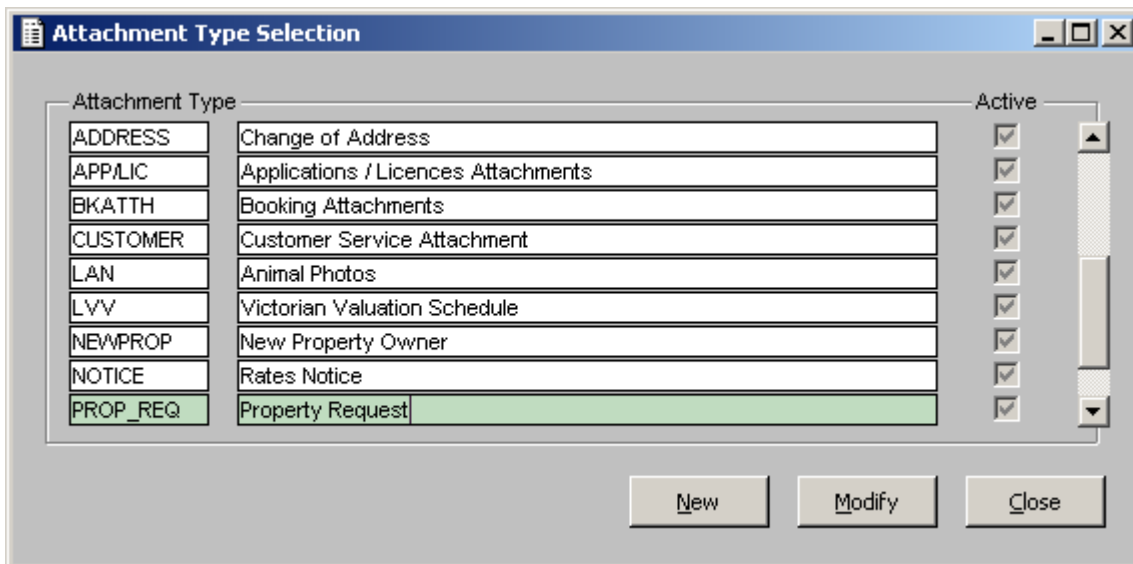
Available
A list of all available Attachment Types will appear here. Use the move buttons in the middle of the screen to assign those Attachment Types for this Attachment Entity.

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
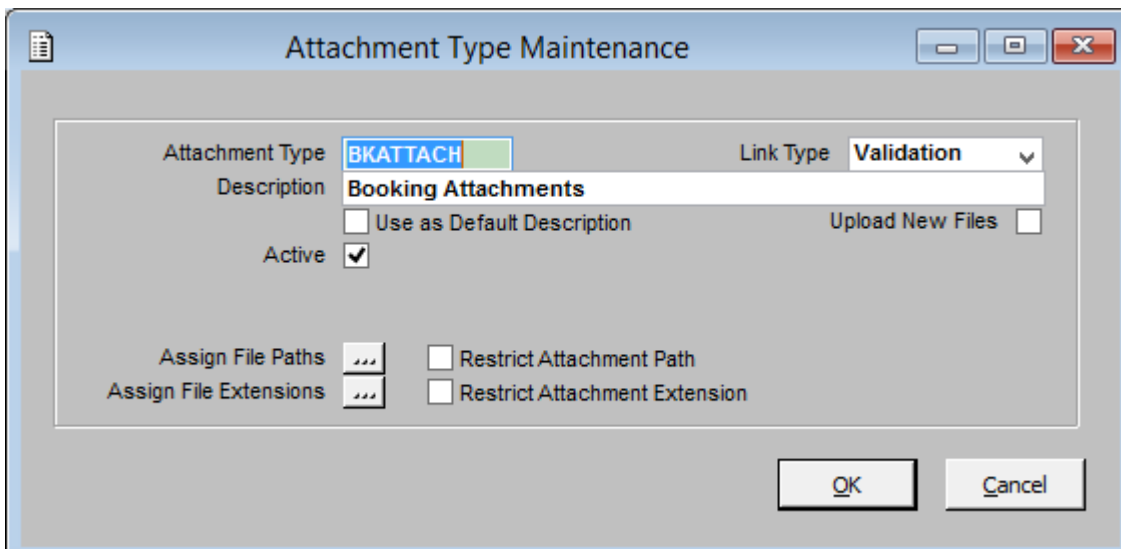
Attachment Type Selection Form

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

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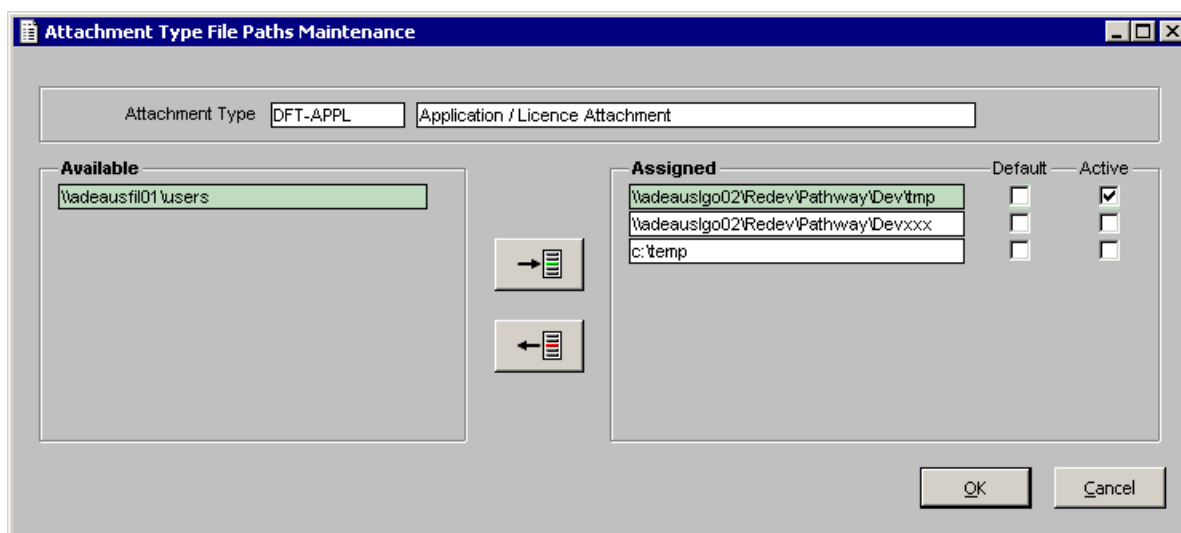
Restrict attachment Path
This parameter allows council to nominate the path(s) where the attachments will reside. This will allow council to only attach to documents/objects that reside in the nominated directory. The paths available for selection must have been pre-defined within the File Path Maintenance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

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.

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'.)

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 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.
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Batch Processing
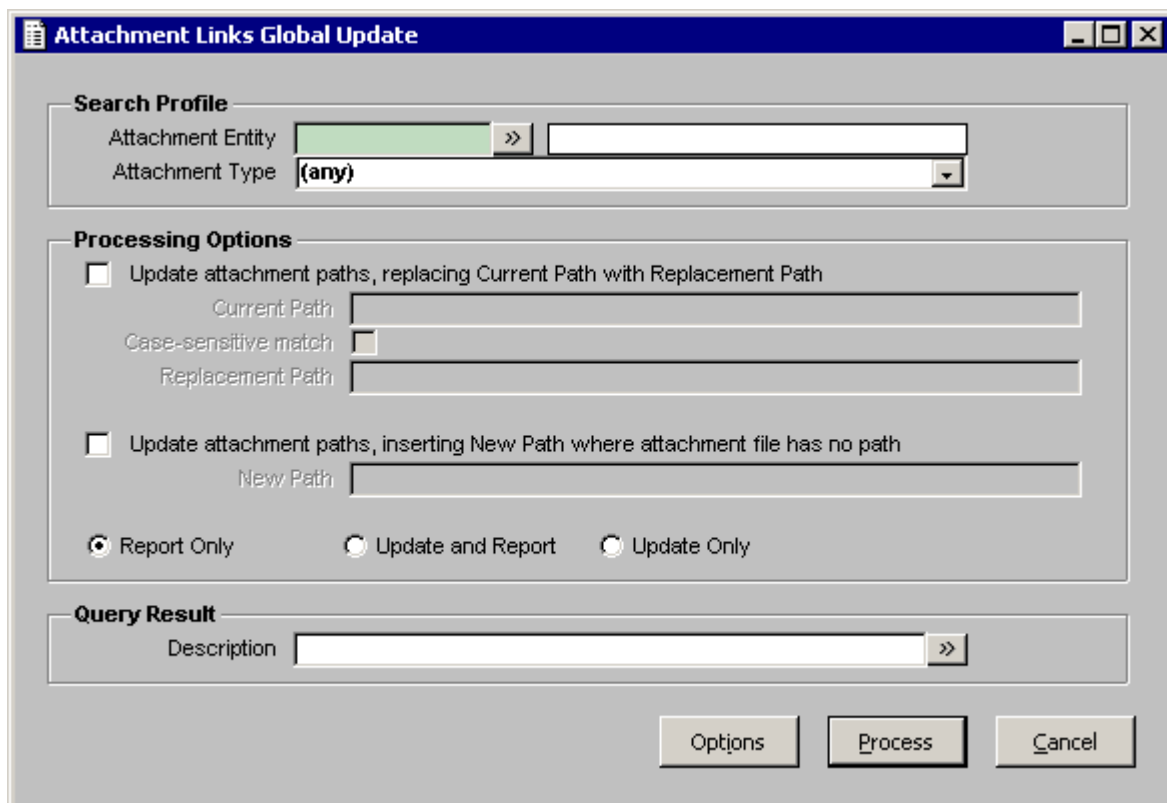
The following topics are included in this section:

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

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 Current 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 }"
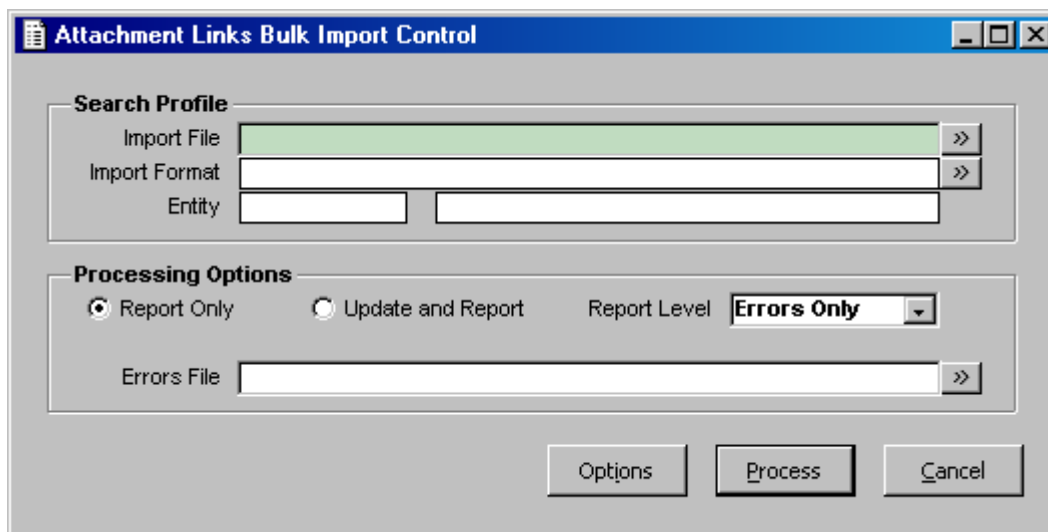
The extract is now complete.

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.

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 ars 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
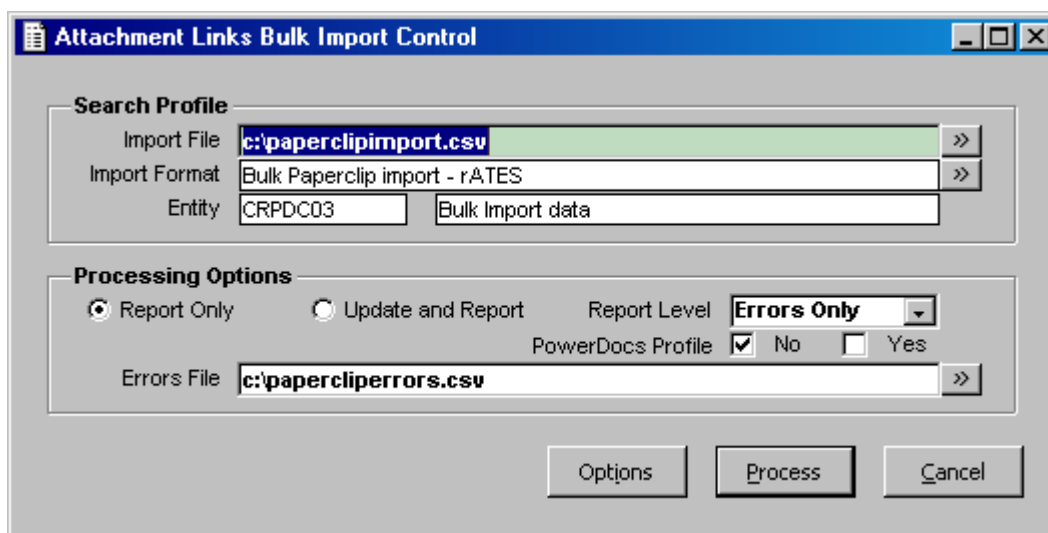   Detailed   Which will include both successfully imported and errors encountered.

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 **

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.