Edit Attachments

1. Access {SoftwareName}.
2. At the {SoftwareName} Main Menu, click the **plus sign** next to BUSINESS AREAS.
3. Select a business area and form.
4. Search for the record you wish to edit.
5. Click the **Attachments icon**.
6. To edit a digital file that has already been uploaded, click **Edit This Attachment**.
7. On the Attachment Details screen edit information about the file such as the Security ID, ID, Title, Type, Subtype or Remarks, then click **Save**.
8. If you want to edit the attachment itself, click **Open File**.
   Select **Open** or **Save** based on your needs.
9. Edit your attachment.
10. When complete, navigate back to the Attachment Details screen. Click **Upload File**, then click **Browse** to locate the new document on your computer. The old file is replaced once the upload is complete.

Link New Attachments

1. Access {SoftwareName}.
2. At the {SoftwareName} Main Menu, click the **plus sign** next to BUSINESS AREAS.
3. Select a business area and form.
4. Search for the record you would like to create a link.
5. Click the **Attachments icon**.
6. To attach a digital file that has not been previously uploaded, click **Upload New Attachment Wizard**.
7. Enter the data fields on the Attachment Details screen (*red fields are required). **Note:** When **Type** is selected, the Search and Select: Document Type window will display. “Document” is the default value. To insert an image, enter % in the Search field and click **Go**. The screen will refresh, then you can select “Document” or “Image”. Make a choice, then click **Select**.
8. Enter the details, then click **Save**.
9. Select **Upload File**.
10. Browse to the location of your digital file on the Upload New Attachment screen and click **Upload file**. **Note**: Do not click **Upload File** more than once. There is no indicator that the file is uploading. Wait a few moments to make sure the file uploads.
11. When the file has completed uploading, the Upload File screen will refresh. The name of the uploaded file displays in the File Name field .
12. Click **Save**, then click **Continue**.
13. On the Link Attachments screen, click **Save**. The attachment is now uploaded and attached to your record.

Additional Resources

For additional information, visit any of the following websites:

- *{SoftwareName} User Support*
  http://baseURL/support/index.shtml
- *Attachments Help*
  http://baseURL/support/mergedProjects/basics/#attachments.htm
- *{SoftwareName} QuickGuides*
  http://baseURL/support/quickguides/index.shtml
- For additional instructions on accessing {SoftwareName} go to:
  https://baseURL/support/mergedProjects/basics/

Link Existing Attachments

1. Access {SoftwareName}.
2. At the {SoftwareName} Main Menu, click the **plus sign** next to BUSINESS AREAS.
3. Select a business area and form.
4. Search for the record you would like link.
5. On the toolbar, click the **Attachments icon**.
6. To attach a digital file that has already been uploaded, click **Link Existing Attachment**.
7. Click the **Flashlight icon** on the Link Attachments screen.
8. Enter your search criteria and click **Go**. When the attachment record displays in the “Results”, select the checkbox and click **Select**.
9. Click **Save** on the Link Attachments screen. The attachment is now attached to your record.

Unlink Attachments

1. Access {SoftwareName}.
2. From the {SoftwareName} Main Menu, click the **plus sign** next to BUSINESS AREAS.
3. Select a business area and form.
4. Search for the record you would like to unlink a document or image.
5. Click the **Attachments icon**.
6. To unlink a digital file, double-click **Unlink Attachment**.

Delete Attachments

1. Access {SoftwareName}.
2. From the Main Menu, open TOOLS > Documents and Images, then select either Maintain Images Only or Maintain Documents Only.
3. Query the record you would like to delete. Then place the cursor in the ID field, and click the **Delete icon**.
4. The Dependent Data Found screen displays.
5. If the digital file has been unlinked from all records, then only one table name (II_DOC_LU_LINKS) will display.
6. Click **YES**, then click **Save**.

Attachments

{SoftwareName} allows you to attach important supporting documentation to data records. Just about any electronic document or image that supports a feature, land unit, or accomplishment instrument can be uploaded and linked to an {SoftwareName} record. There are two distinct steps to attaching documentation to a record:
1. Upload the file to the central {SoftwareName} library
2. Link the file to the desired record.
Once someone has uploaded a file, however, that file does not need to be uploaded again; other users may link to that same file.

General Information About Attachments

- Attachments are stored in a secure, nationwide server. By storing attachments in one location, users can view and use the attached documentation from any location, provided they have the appropriate access to the application. Additionally, the attachments database, along with all {SoftwareName} data, is routinely backed up.
- Attaching a document is usually a two-part process. You must first upload an attachment to the server and then link it to the data record.
- If someone else already has uploaded an attachment, you don't have to upload it again. You can search for that file and link to it.

Roles

All {SoftwareName} users can view any attachment that is already linked to an {SoftwareName} record.

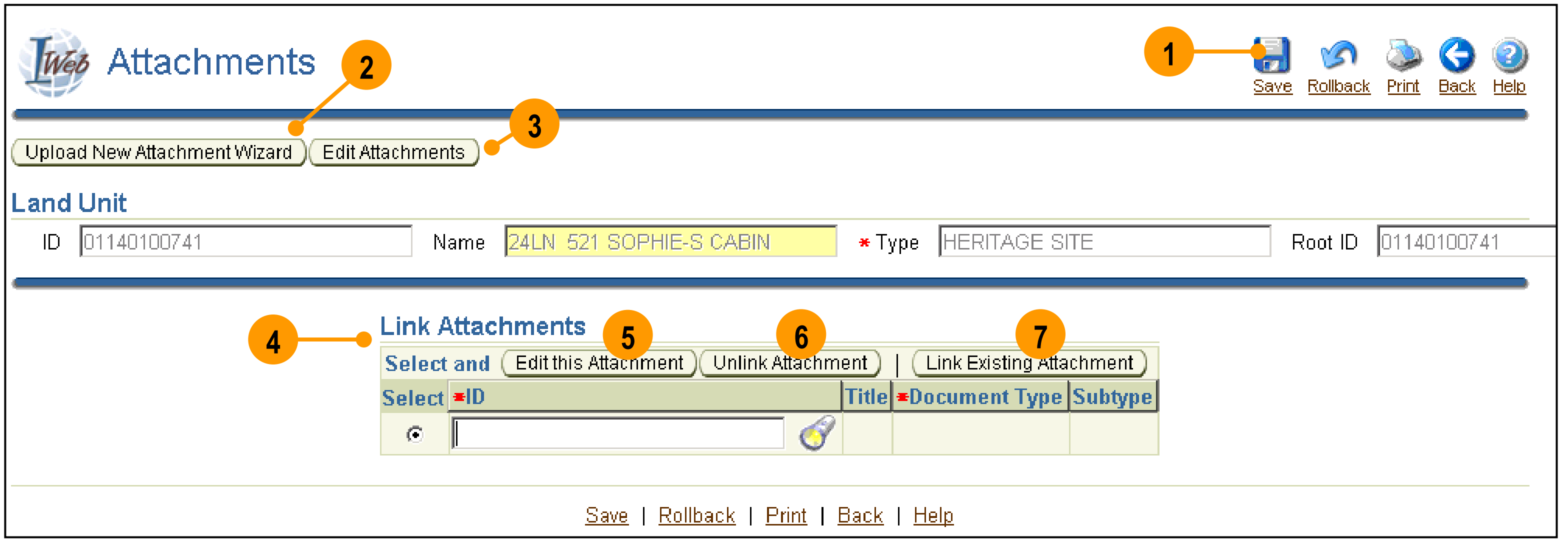
You must, however, have the Documentation Manager role (II_DOCUMENTATION_MGR) in order to (1) link an attachment (that already exists in the attachments database) to a record, (2) upload new documents and images to the attachments database, or (3) edit an attachment's surrounding details (type, location, title, date, author, etc.).

Tips

- If a file is attached to a specific business area’s record (such as Heritage), then it can only be viewed by others with the appropriate roles, such as the Heritage role(s).
- If a file is attached to a Heritage record, for example, AND another business area’s record, then it can be viewed by anyone, regardless of their roles.
- Unlinking a file from a record does not delete it from the central server, it only disassociates the file from that specific record. Any uploaded file is only deleted from the central server if the document or image record is deleted.

Attachments Screen

{SoftwareName} allows you to attach important supporting documentation to data records. The Attachments screen is accessed by clicking the Attach icon (or) on the {SoftwareName} tool bar.



1 {SoftwareName} Toolbar
The toolbar contains functions for items used across all {SoftwareName} application.

2 Upload New Attachment Wizard
Click the Upload New Attachment Wizard to attach a digital file that has not been been uploaded previously.

3 Edit Attachments
Click Edit Attachments to edit an existing digital file that has already been uploaded.

4 Link Attachments
Attachments that are already uploaded to the database can be linked to a data record.

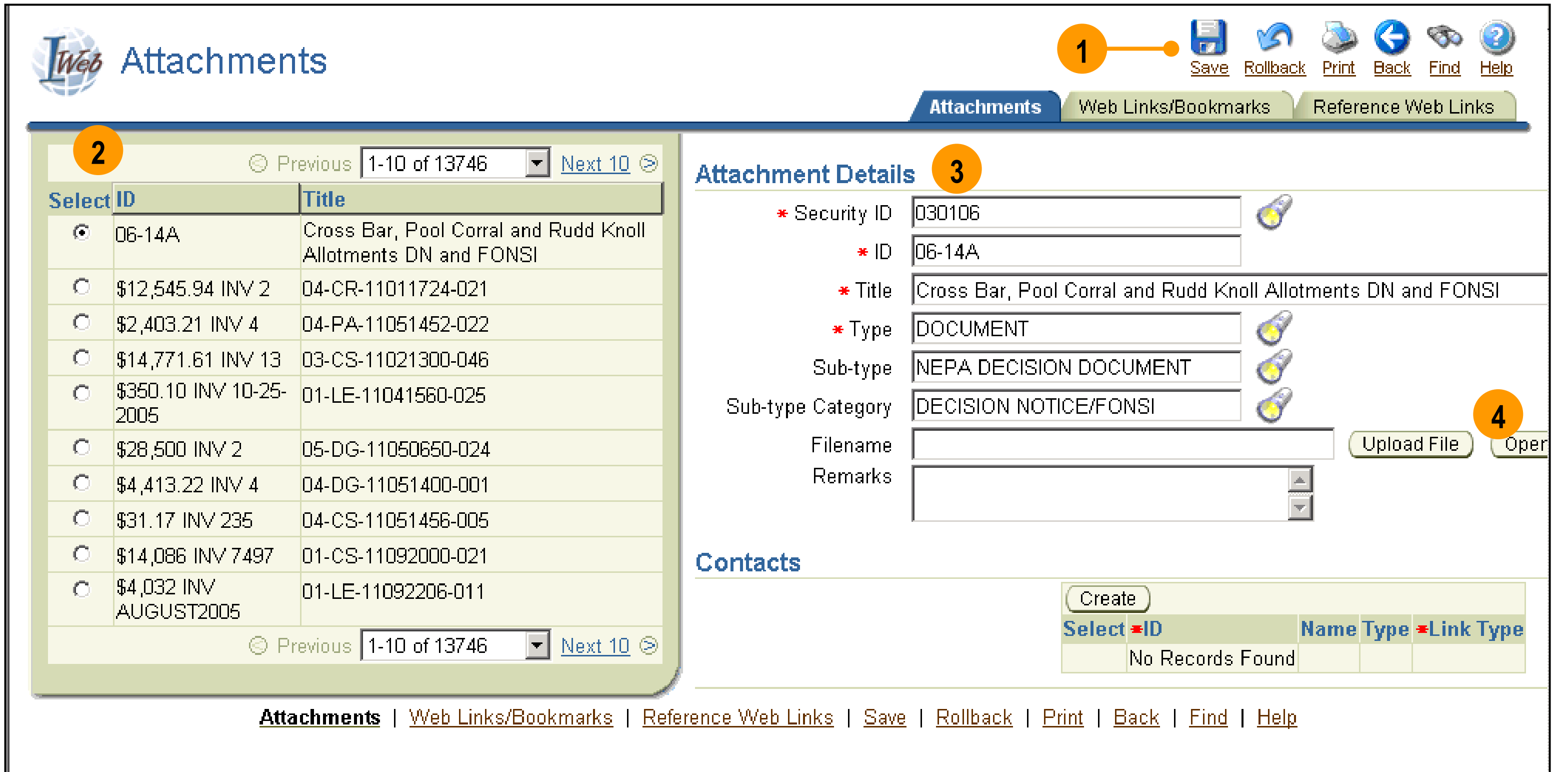
5 Edit this Attachment
Click Edit this Attachment to edit an attachment that has already been uploaded.

6 Unlink Attachment
Click Unlink Attachment to unlink an image/document.

7 Link Existing Attachment
Use the Link Existing Attachment button to link a previously uploaded attachment to a record.

Attachment Details Screen

The Attachment Details screen is accessed by clicking the **Attach Edit Attachments button** on the Attachments screen. On the Attachment Details screen you may edit information about the record such as the Security ID, ID, Title, Type, Subtype or Remarks. Additionally, you may also open the attachment for editing.



Field	Definition
ID:	The user defined ID.
Title:	The title of the image or document.
Type:	The type of attachment: Image or Document.
Subtype:	A subtype that further describes the Type of attachment.
Subtype Category:	The subtype category, such as Decision Notice.
Filename:	The name of the file including the extension (.doc, .pdf, etc.).
Remarks:	A brief narrative for relevant attachment information.

1 **{SoftwareName} Toolbar**
The toolbar contains functions for items used across all {SoftwareName} application.

2 **Record Navigator**
Use the Record Navigator to locate the desired record. Sort the records by clicking the column titles.

3 **Attachment Details**
Any of the fields can be edited. Any field marked with a red asterisk is mandatory.

4 **Upload File/Open File**
Browse to the location of your digital file and click Upload file. Do not click Upload File more than once. There is no indicator that the file is uploading. Wait a few moments to make sure the file uploads. Use the Open button to open the