

Attachments – General information

In the system, it is possible to define attachment, that is to add different files, e.g., images or text files, to particular objects. This way, the user can attach a product image to item form, personal documents to employee form, scanned documents to invoice etc.

Types of attachments which can be added to objects:

- archives (.zip, .rar)
- log (.log)
- spreadsheet (.xls, .xlsx)
- text document (.doc, .docx)
- image (.bmp, .png, .jpg, .dib, .gif)
- other (without a specified extension)

Objects to which an attachment can be added are the following

- customer/vendor group
- customer/vendor form
- item group
- item form
- employee form
- institution form
- bank form
- warehouse form
- selected documents

List of all attachments is available from the level of *Configuration → General → Attachments*.

The screenshot shows a window titled 'Attachments' with a table of attachments and a preview of an image. The table has columns for Code, Name, Type, Size, Language, and Location. The 'hoodie' row is selected, and its size (91.746) is displayed in the status bar. Below the table is a filter panel with options for size, saving method, and free space. The preview on the right shows a grey hoodie.

Code	Name	Type	Size	Language	Location
ec	ec	ec	ec	ec	
bag	bag	Image	91.746	English	File in da...
hat	hat	Image	860.938	English	File in da...
hoodie	hoodie	Image	91.746	English	File in da...
T-shirt	T-shirt	Image	110.594	English	File in da...

List of attachments with preview of attached image

List of attachments is composed of the following columns:

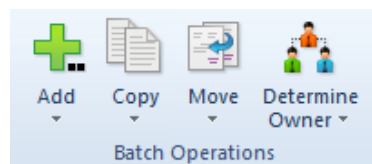
- **Code**
- **Name**
- **Type**
- **Size** – dimensions expressed in bytes
- **Language** – language in which an attachment was defined
- **Location** – file path
- **Owner** – company in the system for which the attachment will be available (column hidden by default)

Below the list of attachments, there is the filter panel used for displaying only desired attachments. Attachments can be filtered by size, saving method and the amount of free space. The size of attachments saved in the database can be reduced by checking the parameter *Limit the size for attachments in a database to*, available from the level of *System -> Configuration -> Computer*. Field *Free Space* is provided for information purposes and indicates the amount of free space used for storing saved attachment.

In the panel on the right side of the attachment list, attachment preview is displayed. The system is equipped with

built-in editors for attachments in *PDF*, *Word* and *Excel* formats. Owing to that, it is possible to display a file directly in the attachment preview window in the system, without the need to install external programs for previewing, e.g., a user can display *Word* and *Excel* files without having *Microsoft Office* package installed and *PDF* files without *PDF Viewer* program.

In the menu, there are standard buttons for adding/editing/deleting given object from the list as well as refreshing the list. Moreover, there are also buttons allowing for performing operations on attachments in a single batch. To be able to perform batch operations on attachments, a user must be assigned to an operator group with the permission *Batch operations on attachments*, which is available from the level of operator group (menu *Configuration* → *Company Structure* → *Operator Group*), in tab *Other Permissions*.



Group of buttons
for handling batch
operations

[Add] – allows for adding one or more attachments

- to a database
- to an attachment folder
- as URL

[Copy] – allows for copying one or more attachment

- to a database
- to an attachment folder

[Move] – allows for moving one or more attachments

- to a database

- to an attachment folder

[**Determine Owner**] – a user logged-in to the main company can select one of the following options:

- *All* – selected attachment will be available in all the companies defined in the system
- *Selected* – an attachment will be available in a particular company indicated by the user and in its child centers

From the level of the other center, only the option *All* is available.

Determining of the owner affects the visibility of attachments on the list. On the list of attachments in the parent company, all attachments will be displayed. On the list of attachments in other centers, on the other hand, only those attachments will be displayed, whose owner is the company to which a user is logged in as well as those whose owner is set to *All*.

Note

During conversion of database from Comarch ERP Standard system versions previous to version 2015.0, by leaving the parent node unchanged, the owner of all attachments will be parent company. By converting the parent node to center of *Company* type, on the other hand, the owner of all attachments will be the newly created center of *Company* type, attached to the parent company.

Defining new attachment

A new attachment can be added by selecting [**Add**] button from the *List* button group

The screenshot shows a software window titled "Attachment" with three tabs: "General", "Objects", and "Attributes". The "General" tab is selected and contains the following fields and options:

- Code:** A text input field.
- Name:** A text input field.
- Language:** A dropdown menu set to "English".
- Type:** A dropdown menu set to "Archives".
- Size:** A text input field.
- Data Format:** A text input field.
- Saving:** A dropdown menu set to "File in database".
- URL:** A text input field with a right-pointing arrow button.
- Owner:** A dropdown menu set to "Company".
- Active:** A checked checkbox.
- Availability:** A group of checkboxes for "B2B", "Mobile", "e-Shop", "eBay Listing", "BI", and "Retail", all of which are currently unchecked.

Below the main fields is a "Translations" section with a table. The table has a header row with columns "Language", "Code", and "Name". Below the header is one data row with the value "en" in each column. Below the table is a large empty area with the text "No image data" centered. At the bottom right of the form is an "Edit Filter" button. At the bottom left, there are small icons for saving and closing the form.

New attachment form

In the menu, standard buttons allowing for saving and closing form, are available. The *Attachments* group of buttons contains the following options:

[Load From File] – loads an attachment file to from a selected location on a computer. Upon selecting a file, part of the information on the attachment form will be completed automatically

[Scan] – loads the scanned file directly to an attachment

[Preview File] – previews an attachment in an external program which is responsible for reading a file of a given type in the operating system

[Save To File] – saves attachment to a file in the selected location on a computer, for instance, in case attachment was added through scanning

An attachment form is composed of tabs: *General*, *Objects* and *Attributes*

Tab *General*

The tab contains the following elements defining an attachment:

- **Code** – mandatory field, unique value. If this field is not completed, it will receive an attachment name without extension after loading the file.
- **Name** – mandatory field, the value does not have to be unique. If this field is not completed, it will receive an attachment name without extension after loading the file.
- **Active** – parameter checked by default. If the parameter is unchecked, it is not possible to attach a file to an object.
- **Language** – drop-down list allowing for selection of the language in which the name of an attachment is being defined. The list of language versions handled in the system is retrieved from the generic directory
- **Owner** – field for determining the owner of an attachment
 - From the parent company level, a parent company will be set as owner. A parent company can, however, be changed to a center of *Company* type with the option *All*. Depending on the selected values, attachment availability is specified in the company structure. After selecting a particular company, attachment will be available in its other child centers.
 - From another center level, a company, to which operator is logged in, will be set in the field *Owner*. Owner in this case can be changed only to the option *All*.

If the above data is not specified, it will be completed automatically upon loading an attachment with the help of the button [**Load From File**]:

- **Type** – drop-down list allowing for selection of one of

file types defines in the generic directory called *Attachment Types*

- **Size** – indicates attachment size expressed in bytes
- **Data Format** – indicates data extension, e.g., *.bmp for a bit map
- **Location** – indicates a place where attachment is saved. The value is by default retrieved from the attachment type definition (generic directory *Attachment Types*).
 - *File in database* – if the size of the loaded file exceeds the value specified in bytes for that attachment, the system will block saving the attachment and will display a relevant message.
 - *File in attachment folder*
 - *URL*
- **URL** – field indicating a path to a file on a disk

In *Availability* section, it is possible to share an attachment in particular modules/applications cooperating with Comarch ERP Standard system:

- B2B
- Mobile
- e-Shop
- eBay Listing
- BI
- Retail
- WMS Management and WMS Warehouseman – visible only after the installation of *Comarch WMS Management* and *Comarch WMS Warehouseman*

In *Translations* panel, it is possible to add an attachment in a different language than the currently defined one.

Example

To an exemplary attachment entitled *User manual.pdf*, defined in English, it is possible to attach a file *Manuel d'utilisateur.pdf* defined, in turn, in French. Owing to that, association with the file in English is presented from the

level of the file in French. Such association between objects allows adding easily and quickly a subsequent attachment translation. Associated attachments in different languages are visible from the level of any attachment in given language.

To add a new translation, click on [**Add**] button in the *Translations* button group, mark an appropriate attachment on the list and confirm your selection by clicking [**Select**].

Removing a translation removes it from also other attachments it was added to.

Tab Objects

In *Objects* tab, there is a list of objects a given attachment was assigned to. An object can be edited by selecting [**Edit**] button. Assigning of attachment to objects is described in article [Assigning attachment to an object.](#)

Tab Attributes

In this tab, it is possible to attach an attribute to attachment. This functionality has been described in article [Assinging attribute value to an object.](#)

Assigning attachments to an object

Attachments are assigned to objects when adding or modifying a given object, for example, a new item. In the tab *Attachments*, it is necessary to click on the button [**Add**], which opens the list of available attachments. Here, the user can select files which will be assigned to an object or load them from a file

saved on a computer or scan them.

When assigning more attachments to an object, it is possible to specify which of the added attachments is default by selecting a checkbox in the column *Default*.

Note

For an image thumbnail to appear on the list of items or in a document item in column Attachment, an attachment must be assigned to an object and marked as default.

No.	Code	Name	Langu...	Type	B2B	Mobile	e-Shop	eBay	BI	Retail	Default
1	hoodie	hoodie	English	Image	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	T-shirt	T-shirt	English	Image	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Table for assigning attachment to an object

Moreover, attachment can also be shared and marked as default for particular modules/applications cooperating with Comarch ERP Standard system. *WMS Management* and *WMS Warehouseman* are visible only after the installation of WMS. Availability of attachment is set by selecting a checkbox in particular columns (double clicking in the checkbox), whereas default attachment is set by clicking in the checkbox three times – the checkbox will then be selected and bordered.