Attachment Types Table

The Attachment Types table is a background table that holds records that populate the values displayed in the Attachment Type field drop-down list within an Attachment record. It also defines any special fields that should be displayed for this attachment type within the Attachment record.

Use Case

Attachment Types are created and edited by users in the Admin groups and Contract Managers. Each Attachment Type record can be one of the following, or both:

- An option for Type of Document in a Company Document record
- An option for Attachment Type in an Attachment record
- An option for Sourcing Events in a Sourcing Event record

 The Show in Tables field in the Attachment Type record controls whether the Attachment Type record can be used in the Attachment, Company Document or Sourcing Event tables.

The Attachment Type and Fields to Show fields are pulled into the Attachment, Company Document and Sourcing Event tables as a link to selected fields from another table. The values in Fields to Show are used to control the visibility of certain fields in the Attachment, Company Document and Sourcing Event records.

The Sort Order field is used to determine the order of the drop-down list displayed in the Attachment Type field within Attachment records.

	Edit	ID	Attachment Type	Status	Show in Tables	Sort Order ↑
☐	🖉	10	W-9	Active	Company Documents	1
☐	🖉	14	Enclosure	Active	Sourcing Events	2
☐	🖉	4	Document Provided by Approver	Active	Contracts	3
☐	🖉	2	Fully Executed Agreement	Active	Contracts	4
☐	🖉	19	Document Provided by Employee	Active	Contracts	5

The "Attachment Type can be used in comparisons" choice field can be used to determine whether different Attachments of this type can be compared with one another. Select Yes to enable the comparison feature.

Additional Fields for Sourcing Events

If you select the Sourcing Events table from the Show in Tables lookup option, two new fields appear on the Attachment Type tab. These fields determine the default settings for new Sourcing Event Attachment Type records:

- **Include in Merge**: Select Yes to allow users to click a button from the Sourcing Event record that merges all relevant Attachment records together to form a new Sourcing Event document in PDF format.
- **Show in Supplier Responses**: Select Yes to allow the attachment to appear in the list of Published Documents from the Supplier Response.

Automation

The Standard System Demo system does not contain any rules, or actions, in the Attachment Types table by default.

Ownership

Attachment Type records are owned by their creator. Specifically, an attachment type record is owned by the user whose Login matches the Creator Login field.