

Attachments Table

Each record in the Attachments table represents an attachment that is linked to a Contract record, Company Document record, or Sourcing Event record.

Contract attachments contain information about the related Contract record for reference, which is held on the Contract Info tab of the Attachment record. Types of Attachments can include generated contract documents, performance bonds, inbound documents, and signed agreements. Each attachment contains information about the related contract for reference, which is held on the Contract Info tab.

Company Document attachments contain information such as invoices and purchase orders.

Sourcing Event attachments contain information such as sourcing event packages and sourcing event files.

Use Case

New Attachment records can have a Status of Active, Expired, Sourcing Event Canceled, Contract Inactive, or Superseded, and are created:

- Directly from the Attachments table
- From a Contract record
- From a Sourcing Event record
- By inbound email

When an attachment is created, the flags used for "Include in Approval Packet", "To Be eSigned", and "Publication Level" are set based on the Attachment Type.

When an attachment is editing using "Edit and Checkout", and the attachment is revised, the revision is pushed to a new attachment record.

The sections below contain further detail about each creation method.

Creating Attachments from the Attachments Table

To create a new attachment directly, click New from the Attachments table action bar. You can select the related Contract record on the Contract Info tab using the lookup icon next to the Contract Title field.

There is a feature in Attachment records that allow you to compare attached files. You can either compare the current file against the most recent version, or compare the current file against the original, or baseline version. To learn more about these comparison options, read their descriptions below:

Creating Attachments from Contracts

Attachments can be created directly from a Contract record, usually found on the Attachments tab of the Contract record. While this is an easy way to add new Attachments to a related Contract, it's preferable to do so in a standard workflow like what is listed in the Sourcing Events sections below. To create a new Attachment record from the Contracts table, as well as any related table that may include an Attachments tab:

1. Click New on the Attachments action bar.
2. Fill out the form and Save the record, which automatically links it to the contract.

Attachments can also be created from a document template using the Create and Attach button in the Contract. They can also be created by an action that runs on files attached to inbound emails that are sent to the Contract table's inbound email address.

Creating Attachments from a Sourcing Event using Templates

Attachments can be created as part of the standard Sourcing Event record workflow:

1. From the Attachments tab, select the kind of templates you'd like to generate under the Document Generation section.
2. Click Create and Attach Sourcing Event File(s).
3. If you choose to select Yes for "Include Blank Contract Template," a default contract template file will be included. Select the contract type and template.
4. Click Create and Attach Contract Template.

Creating Attachments from a Sourcing Event manually

Attachments can also be manually uploaded from a Sourcing Event record:

1. From the Attachments tab, drag in a new file or click Attach/Manage and select the file.

2. If you'd like the new attachment to replace another file, such as an older version of the same file, select that file from the drop-down list next to File to Replace.
3. Choose a value for Attachment Type to Upload.
4. Click Add the file.

Automation

In the Standard System Demo, the Attachments table contains multiple active rules. These rules are accessed by expanding the Attachments table in the left pane, selecting Setup Attachments, and then selecting the Rules tab:

- **Create: All create actions except OCR:** This rule updates various flag fields that trigger other actions. For example, if Title contains "with Signature Block", then it sets the To Be E-signed field to Yes. For any records where To Be E-signed is set to Yes, the Contract Update DS Files flag is set to Yes which runs a separate rule in Contracts. If Supersede Old versions field is Yes it changes its status to Superseded. It also updates the Attachment type and Title of signed contracts. This rule also creates Contract Clause records on first revision.
- **Edit: Create a new revision document (web, API):** This rule uses a saved search to find attached DOC files that have been revised and converts them into a new record. It also changes the status of the current Attachment to Superseded.
- **Edit: When marked up against baseline changes, convert to clause modifications:** This rule runs a script action that saves the markup file and renames it in accordance with the compared documents.
- **Edit: Handle To Be Signed changes and Superseding (web, API):** This rule updates Include in Approval Packet file and To Be E-signed fields to No when an attachment's status is changed to superseded. It also updates Contract Update DS Files Flag to Yes.
- **Edit: Run OCR action (web, API) if file changes:** This rule uses a saved search to find records in which the Attach File field (PDF) was changed and uses an OCR action to convert the file into a searchable PDF document.
- **Edit: Convert Merged File:** This rule uses a saved search to find records in which the Merged File field has some value and then converts those files into a new attachment record. It also blanks out the Merged File field after conversion.
- **Create: OCR file:** This rule uses a saved search to run whenever an attachment is created. It uses an OCR action to convert the file into a searchable PDF document and appends its filename with _ocr.

Ownership

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