# File Attachments and Realtrac10

How it works!

The file attachment system in Realtrac10 allows users to drag and drop the actual file they are interested in associating with certain things in the system. For instance, when a job is created in the system and the job has a specific file that details the part being made the user would drop that file into the jobs 'image-strip'.

Seen here is the 'Document Management' dialog box that appears when you drop the file onto the job, it allows the user to specify what part of the job the document will be associated with. If you select either 'Drawing' or 'Part' the file is set to the job's part so any job created that is making that part will see this file in its image-strip.
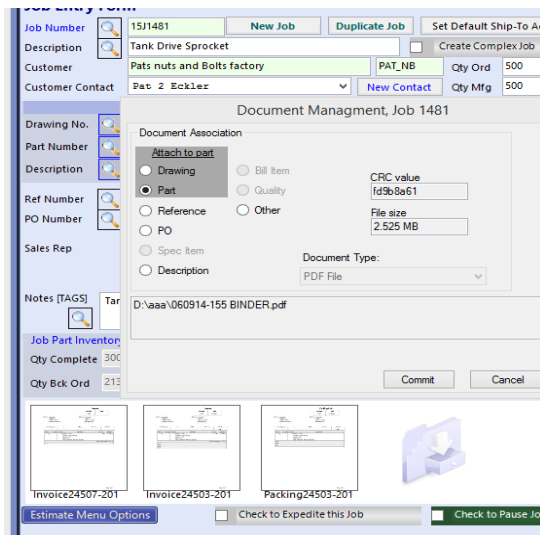
If you select any of the other available options the file will only be seen in this specifics job's 'image-strip'. For example, it only makes sense for a customer provided Purchase Order to be associated with a specific job. Whereas for a drawing associated with a part, it makes sense that that drawing should be visible for all jobs and estimates associated with that part.

Once the file is committed to the Realtrac File Library, a thumbnail of it is visible in the 'image-strip', seen here:
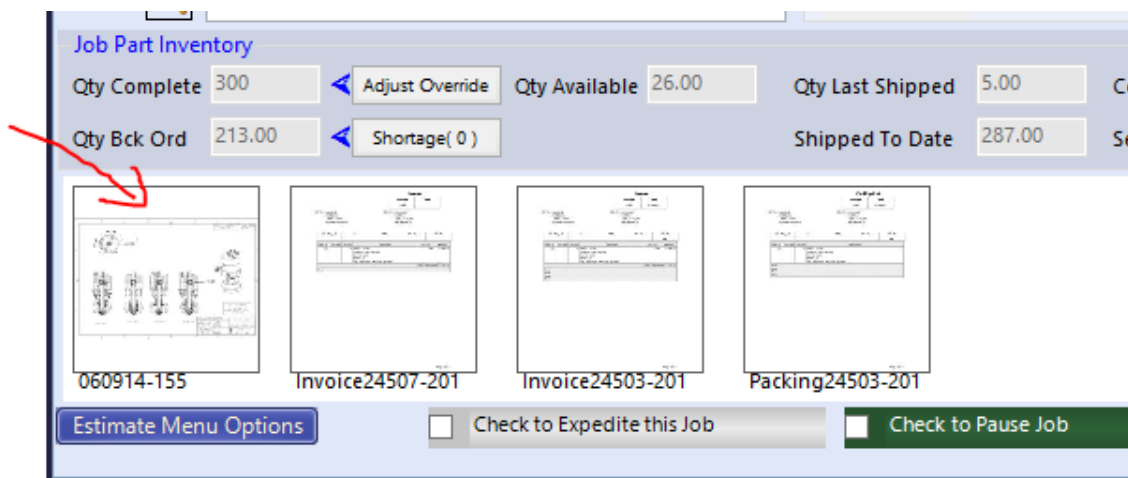
Files can be associated with a part, a job, a job's router line, a bill, an estimate, Inventory items or an item master.

From this point on, if a user wishes to make a change to the file, they should check the file out of the Realtrac file library, make their changes, and then save the file back to Realtrac. Realtrac will automatically update it's copy of the file, will distribute the updated copy to any users that request the file in the future. (See below for a step by step guide to checking and file out, and back in after changes.)

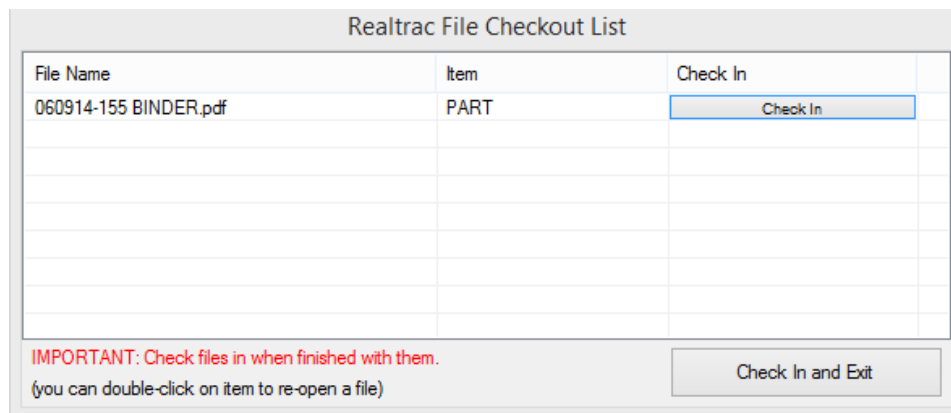## What happens to a file when it's attached to the Realtrac system?

Once a file is attached, a copy of the original file is created and sent to the Realtrac server computer where it is kept in its own document file system we call the Realtrac File Library. **The original file is no longer relevant to Realtrac**. In other words, without checking the file out of the Realtrac File Library, changes to the original file on the users computer will not be reflected not be updated, and other Realtrac users will still see the original file.

How do I view or edit the attached file?

With the proper login permissions users can retrieve the file and open it as they would any normal file in a computer system. Double-clicking the file in the 'image-strip' (or a mouse right-click for the context menu) will check the file out of the library, allowing the user to view the file in it's native application (IE: Acrobat reader for PDF, Microsoft Word for Word documents, 3D editing program for drawings, etc…)

What happens to a file when I view it in the Realtrac system?

When a file is opened, a copy of the server's file is actually transferred from the server computer and put in a specific Realtrac folder on the requester's computer. The user will see a dialog box appear that looks like this:

File Name	Item	Check In
060914-155 BINDER.pdf	PART	Check In

IMPORTANT: Check files in when finished with them.
(you can double-click on item to re-open a file)

Check In and Exit

(Do not dismiss this dialog box if you are planning on saving changes back to the server)

Realtrac monitors this file for any changes the user may make; if they do save any changes to the file the item will turn Red:
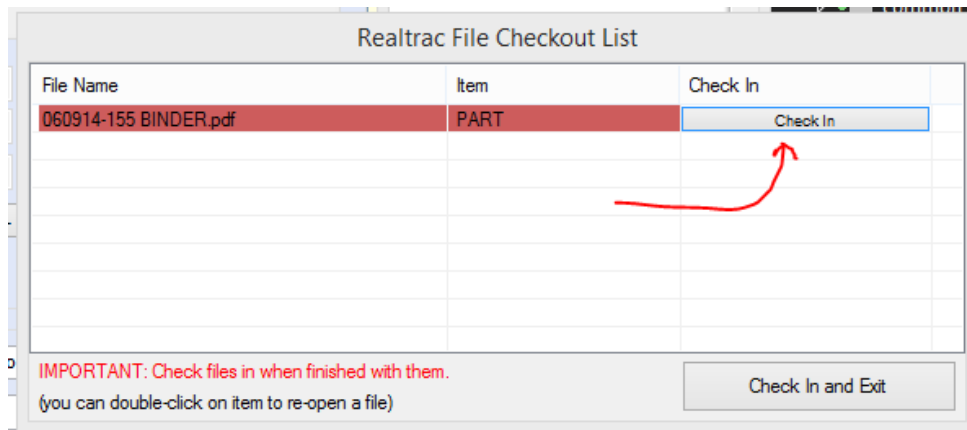
At this point after making changes and you are finished with the file you can click the 'Check In' or the 'Check In and Exit' button.
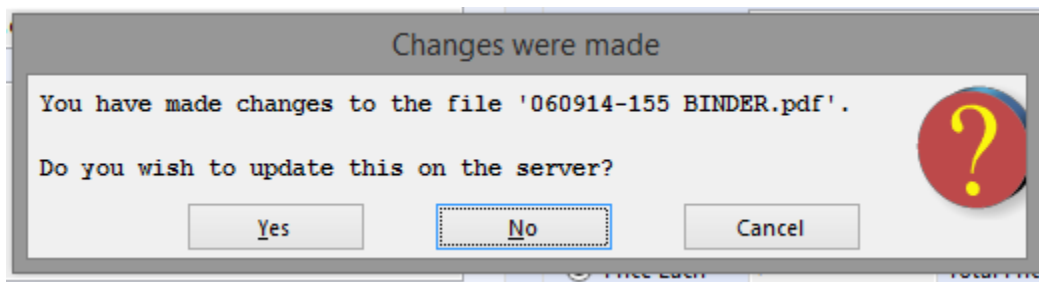
Selecting 'Yes' will upload the new changes back onto the Realtrac server's file system. Selecting 'No' or 'Cancel' will do nothing and will **not** save the file to the Realtrac server.

Using this system in the proper way allows all users who view these files a way to maintain and update files across the whole Realtrac system. This new design in document management does not require a shared folder on a network for virus proliferation safety reasons and ease of setup.

What if I already have my own files system?

Some companies keep their own file system on a shared folder on the network. If this is the scenario you can still use the file attachment system but there are caveats…

If you don't want Realtrac maintaining separate copies of the documents you use on from your network's file system then users must create shortcuts to the files they wish to attach and use that shortcut as the attachment.

But I really need to have access to the actual file, or work on it outside of Realtrac!

A technical user will be able to find the location the Realtrac client stores the file locally when it is checked out. They could then move the file to another directory, or edit it outside of the Realtrac Performance ERP system. These changes will not be tracked, the master file saved on the Realtrac server will not be updated, and multiple versions of the file will be traveling within the organization. It is recommended that users do not attempt to bypass the Realtrac library check-in / check-out procedure for this reason.

If you use shortcuts (AKA Windows .LNK files)…

Realtrac does not recommend that users rely on adding Windows Shortcuts in to the Realtrac File Library. We have had users attempt to use Windows Shortcuts in order to maintain an existing file structure (perhaps on a network share), but in our experience users on occasion forget to send shortcuts, but the actual files themselves. This has caused issues where some items in the Realtrac File Library are shortcuts, others aren't, and users are confused and cannot be sure which files they are editing.

If users have to add Windows Shortcuts to the Realtrac File Library, all Realtrac client users must have the same drive mapped to the file structure; for example, if you have a computer on the network named 'FILESERVER' with a shared folder then users on their own computers should have the same mapped drive 'S'(or whatever) to that share for the shortcuts to work and properly open the file when opened from the Realtrac 'image-strip'.

Additionally, Microsoft attempts to intelligently manage shortcuts, trying to make sure the shortcut remains the same, even if the file it points to is moved, altered, replaced, etc.. this can lead to unexpected results if the user is not vigilant about the actual file they are editing.

The 'Realtrac File Checkout List' dialog will NOT work in this scenario so proper care to maintain those shortcuts need to be taken when changes to the network files takes place!

Also, please note that various versions of the Windows Operating System can handle Shortcuts in different ways, leading to the user expecting one result, but receiving another. This is a function of the Windows Operating Systems, not the Realtrac Performance ERP system.

Further reading on how Microsoft handles shortcuts, and various scenarios, please read:

Distributed Link Tracking https://support.microsoft.com/en-us/kb/312403

WikiPedia on Windows Shortcuts https://en.wikipedia.org/wiki/File_shortcut#Microsoft_Windows

Microsoft Technet "Tracking Shortcuts" https://technet.microsoft.com/en-us/magazine/2009.10.windowsconfidential.aspx