



Attachments in Vantage Financial

Introduction

FINET allows you to upload and attach files to transactions. These attachments are treated as an extension of the transaction with the same FINET security. You will only be able to access attachments for transactions you are authorized to work with.

With the new enhancement, attachments to the header, component, and the warranty tabs of the various transactions now allow attachment retrieval to the following new pages:

- Fixed Asset Registry Header (**FARHDR**)
- Fixed Asset Registry Component (**FARCOMP**)
- Fixed Asset Repair Maintenance (**FARM**)
- Fixed Asset Warranty (**FAWR**)



Instructions

Attachments are uploaded at the tab level by clicking the **Attachments** button. If a tab includes an attachment, the total number of attachments for the tab will be included on the Attachments button.


General Accounting Expense (GAX) ☆ | Validate Submit Save Save & Close ⋮

Draft 🗨️ | 🗨️

Department: 150 | Unit: - | Transaction ID: 2400000006 | Version: 1

Header	Vendor	Accounting	Summary
	Legal Name	Line Amount	
	-	-	

📎 Attachments

If a tab allows more than one line, like the Vendor line, the attachments are uploaded to specific lines by clicking the attachments icon  in the Attachments column of the grid. If a line in the grid includes attachments, then the total count of attachments for that line is added next to the icon in the grid for the selected record.

Header	Vendor (1)	Accounting	Summary
Legal Name		Line Amount	

Vendor Line	Vendor Customer	Legal Name	Alias/DBA	Address Code	Line Amount	Disbursement Type	Handling Code	Single Check	Attachments
0								No	

You can also view all attachments for the tab or selected line by selecting the attachments button or icon. Click the Attachments tab to see existing attachments.

Attachments

Upload **Attachments (1)** History

	FISA8.pdf	2.19 MB
	Added Date: 12/07/2023 Added By: [redacted]	
Type	Standard	Comment
		test

Upload Close

To upload an attachment on a draft transaction, click the **Attachments** button at the tab level or the Attachment icon at the line level. The Attachments window displays, allowing you to **browse** for an attachment or **drag and drop** an attachment from your computer.

Attachments

Upload Attachments History

View the uploaded attachments on Attachments tab

Drop
 Browse

Upload Close

1. Click the **Browse** button in the lower left to browse for additional files from your computer to upload or drag and drop additional files.
2. Once all files are selected, click the **Upload** button in the lower right.

Attachments

Upload (1) Attachments History

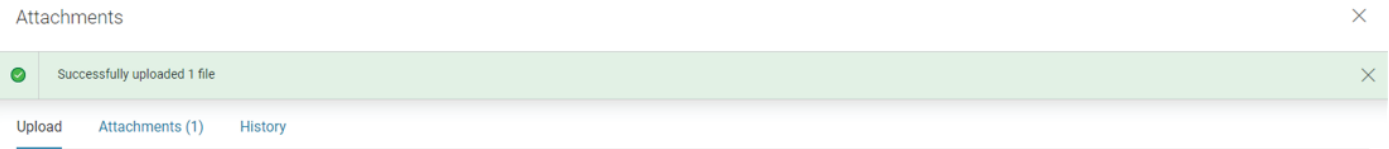
View the uploaded attachments on Attachments tab

	[redacted].pdf	117.16 KB	Click Upload to continue
	Type	Standard	Comment

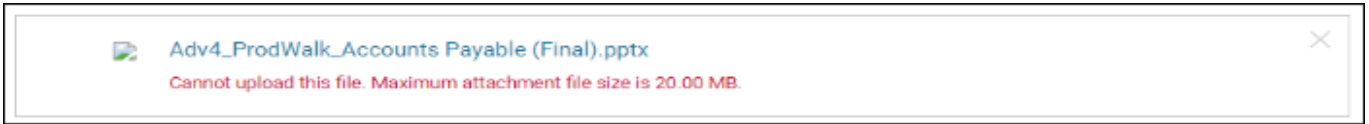
Or Drop files above

1 **2** Upload Close



A message displays indicating the number of files that uploaded successfully and the Attachments tab shows the count for the number of attachments.

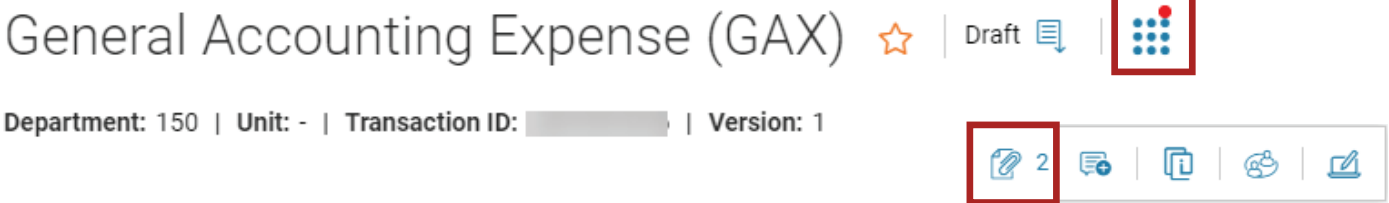



An error displays if the file size exceeds the maximum size. Click the **×** in the upper-right to remove the file.

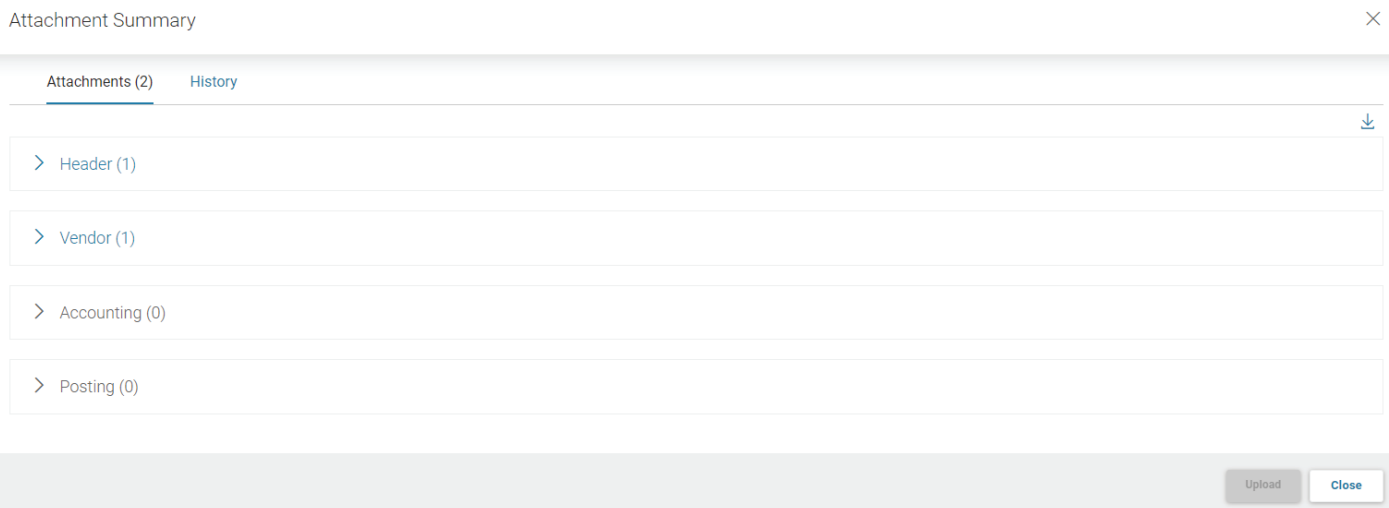


Viewing all attachments on a pending transaction

Once an attachment has been added to any level of a transaction, the Attachments Summary page can be accessed from the **Smart Menu**  by selecting the **View Attachments** icon. 





If an attachment has been added to a transaction, then a count of the total number of attachments will appear on that View Attachments icon.  The Attachments tab of the **Attachments Summary** page lists all attachments (by tab). You can view or download the attachments from the Attachments tab. You can view a history of all attachments on the History tab.

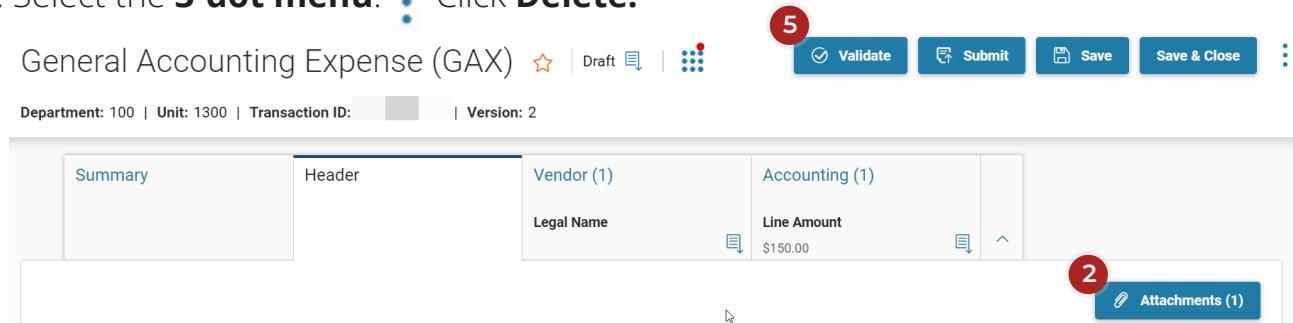


Removing attachments from a transaction

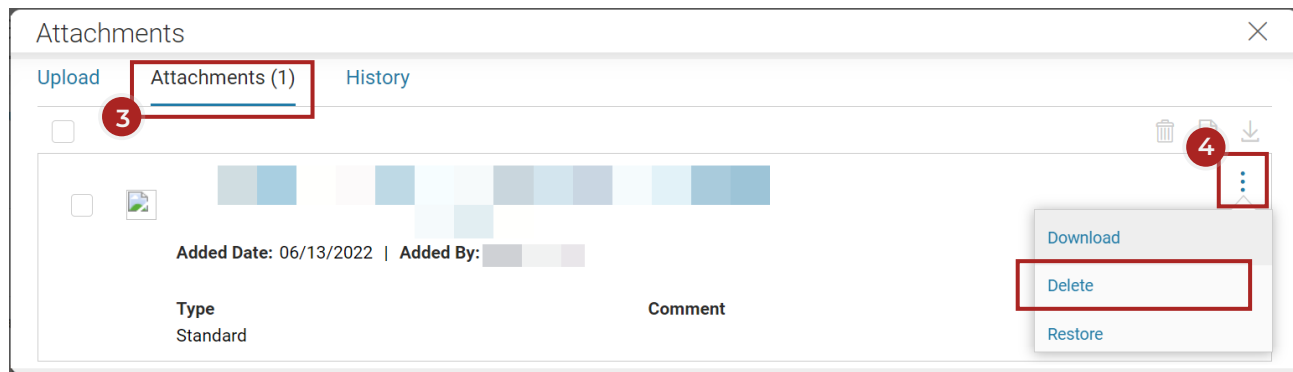
If your document is still there (not discarded) and final, you can follow the steps below to delete an attachment. These instructions work on most, but not all documents.

Sometimes attachments are added to a transaction and later they are discovered to contain confidential information. You can delete attachments by following the steps below.

1. Create a modification of a document (Version 2), by going into the top 3-dot menu , click **Modify**.
2. Select Header tab. Click on **Attachments** button.
3. Click on **Attachments** tab.
4. Select the **3-dot menu** . Click **Delete**.



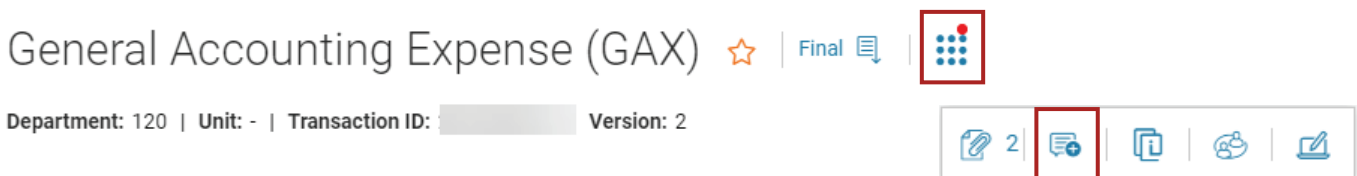
5. Hit **Validate** and **Submit**.
6. Make sure to have the transaction approved.



After performing these steps, the attachments are not in Version 2. Version 1 will show attachments are there, but if you try to download them, a message will pop up letting you know the attachments cannot be located.

Uploading attachments to a final transaction

To upload an attachment on a final transaction without modifying the transaction, you will use the comment feature. Click the **Smart Menu** icon  and then click **Add Comment**.



On the Transaction Comments page:

1. Click the plus icon **+** to add a row.
2. Expand the row **▶** and enter a **Subject** and **Comment**.
3. Click **Save**.
4. Click the **Attachments** icon and browse for attachments or drag and drop one or more attachments.

Transaction Comments

Code: GAX | Transaction Dept: 120 | Transaction ID: 237A000015 | Transaction Unit: | Version: 2



Search

User: Subject: Phase:

Date: MM/DD/YYYY

Search Reset

1 - 1 of 1 Records

Version	Date/Time	User	Phase	*Subject	Attachments
2	12/08/2023 10:35 AM MST	brncollmury	Final	Attachment	 

Transaction Code: GAX

Transaction Dept. Code: 120


Transaction ID: 237A000015

Standard Comment Code:

*Comment: Attachment description[

23/1500

Viewing attachments uploaded to a final transaction

Once the Transaction Comments window is closed, the transaction header updates to show the indicator on the Smart Menu where the **Comment** icon shows content exists. To view the attachments, click the **Smart Menu** icon.  Click the **Comment** indicator.

On the Transactions Comments window, click the Attachments icon to open the attachments page, then click the Attachments tab to view the existing attachments.

General Accounting Expense (GAX)  | Final  | 

Department: 120 | Unit: - | Transaction ID: Version: 2



Transaction Comments

Save Back

Code: GAX | Transaction Dept: 100 | Transaction ID: | Transaction Unit: 1300 | Version: 1



Search

User: Subject: Phase:

Date: MM/DD/YYYY

Search Reset

1 - 1 of 1 Records

Version	Date/Time	User	Phase	*Subject	Attachments
1	06/14/2022 04:08 PM MDT		Pending	reject	 

Attachment Summary



Attachments (1)

History



> Header (1)

> Vendor (0)

> Accounting (0)

> Posting (0)

Upload

Close