

# Release Notes

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Enhanced Attachment v2.0

## Release Features

### Features Overview

This is the initial release of Enhanced Attachment, an app that provides better insight and control to record attachments. Enhanced Attachment record can be categorized by an user-defined list of categories that can be enabled and disabled by an easy-to-use interface. Attachments are also versioned so there is no need to rename file and manage multiple attachment records as all versions are structured under a single record. Enhanced attachments currently support the Account, Opportunity, Contact and Lead objects with plans to expand to other object along with custom objects. Existing standard attachment can easily be migrated to Enhanced Attachment records.

### Enhanced Attachments

Enhanced Attachment is the core custom object of the Enhanced Attachment app allowing users to better track and identify attached files to records. The application uses standard attachments while adding the ability to provide additional labeling, categorization, and reporting capabilities providing a better grasp of attached files. Files in an attachment can also be replaced even after the initial creation of the attachment. The attachments can also be reported on using standard reporting capabilities.

### Attachment Categories

Custom categories can be defined by the system administrator of an org using a simple Attachment Categories Settings interface. Categories can be easily added and removed which will define what categories can be selected when users create or edit an Enhanced Attachment. Categories can be enabled and disabled if the system administrator only wants to hide the category for a limited time without actually permanently removing the category.

### Versioned Attachments

Instead of attaching multiple versions of the same file or replacing an existing attached file, each time an Enhanced Attachment is updated with a new file the current file is stored in an Attachment Version. All previous versions of the attachment file are kept under the Enhanced Attachment

record so that a full history of the changes can be seen. Attachment Version can also be reported on using standard reporting capabilities.

### Orphaned Attachment Clean-up

As the Enhanced Attachment is related to the supported parent objects via a Lookup relationship, the deletion of the parent record will not delete the attachment records and in effect orphaned. In order to identify orphaned attachments a scheduled job can be run via the general Attachment Settings tab to run a job to identify orphaned records Daily, Weekly, or Monthly. Records that have been identified as orphaned can be handled via two method.

- Method 1: **Mark** - Selecting the "Mark" option will instruct the clean-up job to flag the Enhanced Attachment record's Orphaned checkbox. A system administrator can schedule reports to check on the status of the orphaned attachments and decided if they need to moved to another parent record or deleted.
- Method 2: **Delete** - Selecting the "Delete" option will instruct the clean-up job to permanently delete any Enhanced Attachment records that have been identified as orphaned. Note, only choose this option if you organization permits deletion of orphaned attachment records. Otherwise choose the "Mark" option instead to retain the files in your org.

### Attachment Migration Tool

An org may be using standard attachment currently and may want to migrate these existing files into Enhanced Attachments. Enhanced Attachment provides a tool that will allow searching of existing attachment records for supported parent objects via name search or created date range. Standard attachments found in the search can then be submitted to be migrated to an Enhanced Attachment record. Before the request is submitted, the system administrator can select an active Attachment Category to be applied to the attachment before it is processed for migration. In order for the requests to be processed the Attachment Migration job needs to be enabled via the Attachment Settings tab.