How to Unattach and Re-attach
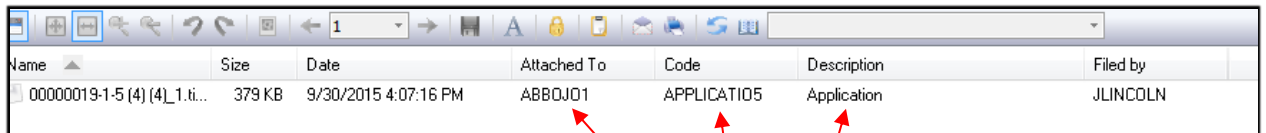
The **Unattach** feature is used to remove the link between the document filed in *etfile* and the **Activity** and **Customer** in TAM (or your Agency Management System you linked the document to.) This feature can be used to correct a mistake attaching the document filed in *etfile* to the wrong **Customer** or **Activity** in TAM. The **Attach** or **Attach and Move** feature is used to correctly link the document filed in *etfile* to the **Customer** and **Activity** in TAM (or your Agency Management System used.) These features are described in detail below.

To Unattach:

1. **Select** the document in *etfile* on the left side of the screen**.**

2. On the **Right** side of the screen put the document in **Contents List View** by selecting the first icon on the top left of the document viewing area.
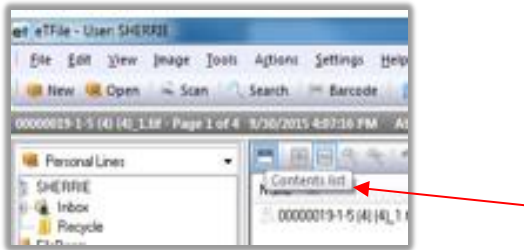

3. When a document is in **Contents List View** the document's descriptions are displayed. For example, **Attach To** displays the Client Code the document is attached to in TAM and the **Code** and **Description** for the **Activity** information the document was originally linked to in TAM when filed to *etfile*.
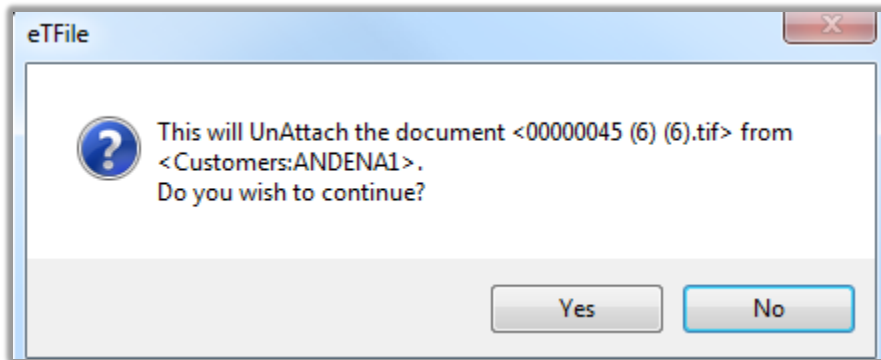
4. **Right Click** on the document on the **left side** of the screen (in the **FileRoom**) in which you want to remove from the link to the **Activity** and **Customer** in TAM.

Note: The **Unattach** feature is not displayed when you right lick on the document on the Right side of the screen in the document viewing area.
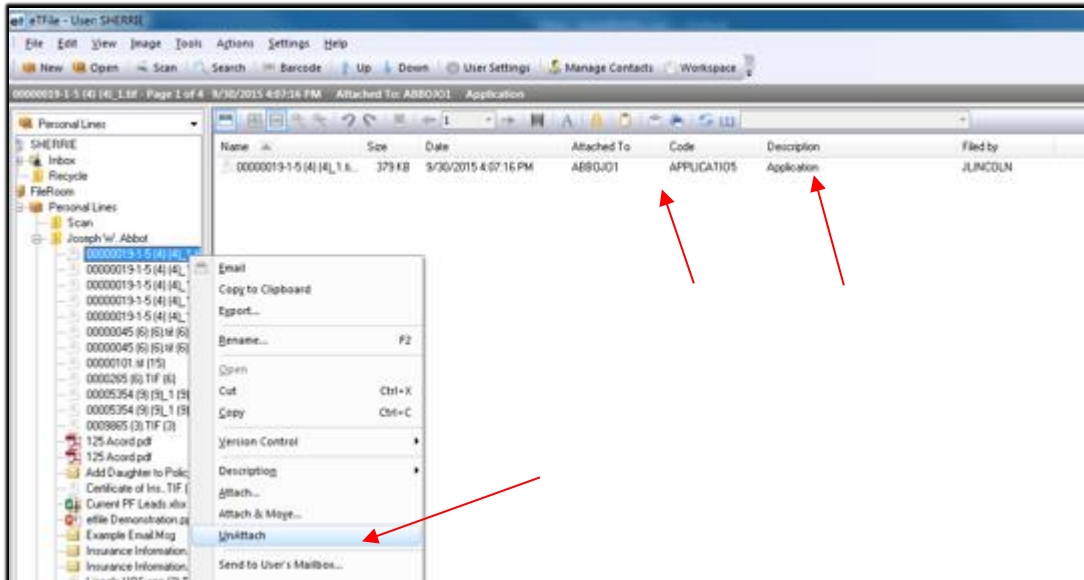
5. Select Yes to the message below:

6. Once you perform an **Unattach** on a document filed in *etfile* that document, when selected in the FileRoom (on the left side) will now display on the right side of the screen (the document viewing side) blank fields for the **Attach To** (client code), **Code** and **Description** (Activity information from TAM) columns. The document is no longer attached to the TAM Customer or **Activity** and therefore, when a search is performed in TAM on this **Client** or **Activity** this document will not be found. It is important to follow the next steps to **Attach** it to the correct Client and/or Activity in TAM.
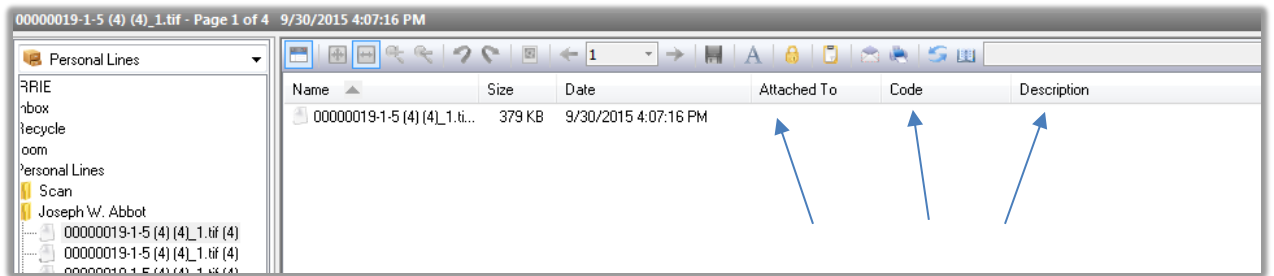
The Attach and Attach and Move Feature

If the document was attached to the incorrect Activity then you should perform an **Attach** on the document to **Attach** it to the correct Activity in TAM. Ig the document was attached to the wrong **Client and Activity** then you want to choose **Attach and Move,** which will move it to the correct customer folder in the Cabinet as well as Attach to the correct Activity in TAM.

To Attach the Correct Activity to the Document in *etfile*:

1. Follow the steps above to "**Unattach**" your document in *etfile* from the links to the TAM Client and Activity.

2. Log into TAM. Choose the correct Client and Activity to attach this document to in *etfile*.

3. Choose the last icon on the etfile Toolbar to capture the activity information from TAM

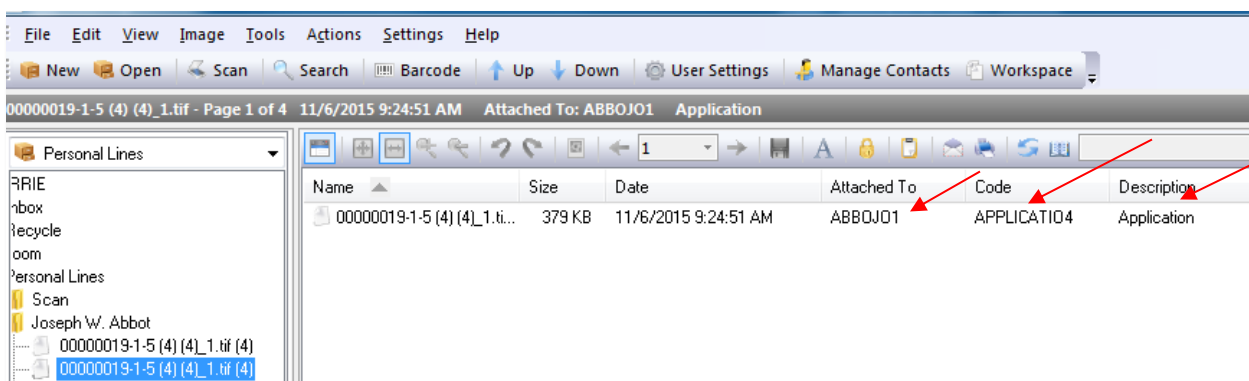4. In *etfile* **Right Click** the document and choose **Attach.**
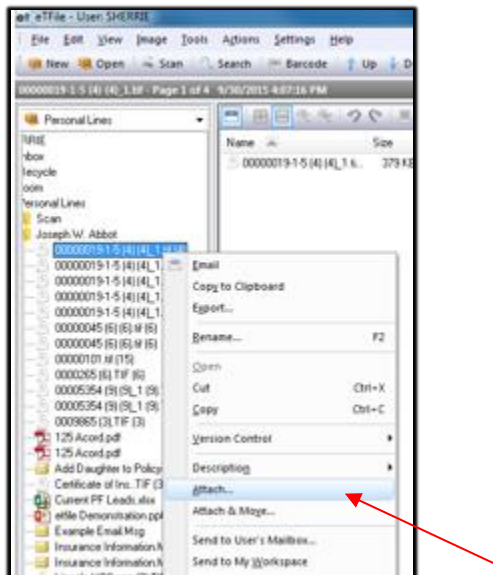
5. The **Attach** Screen appears. Make sure the **Add Description** is checked off and the correct Customer and Descriptions are displayed. The Description at the bottom left of the screen should not be grayed out and should be displayed in black.   If the Activity **Code** and **Description** do not display on the **Attach** screen then close this screen and go back to step 1 and repeat the steps.
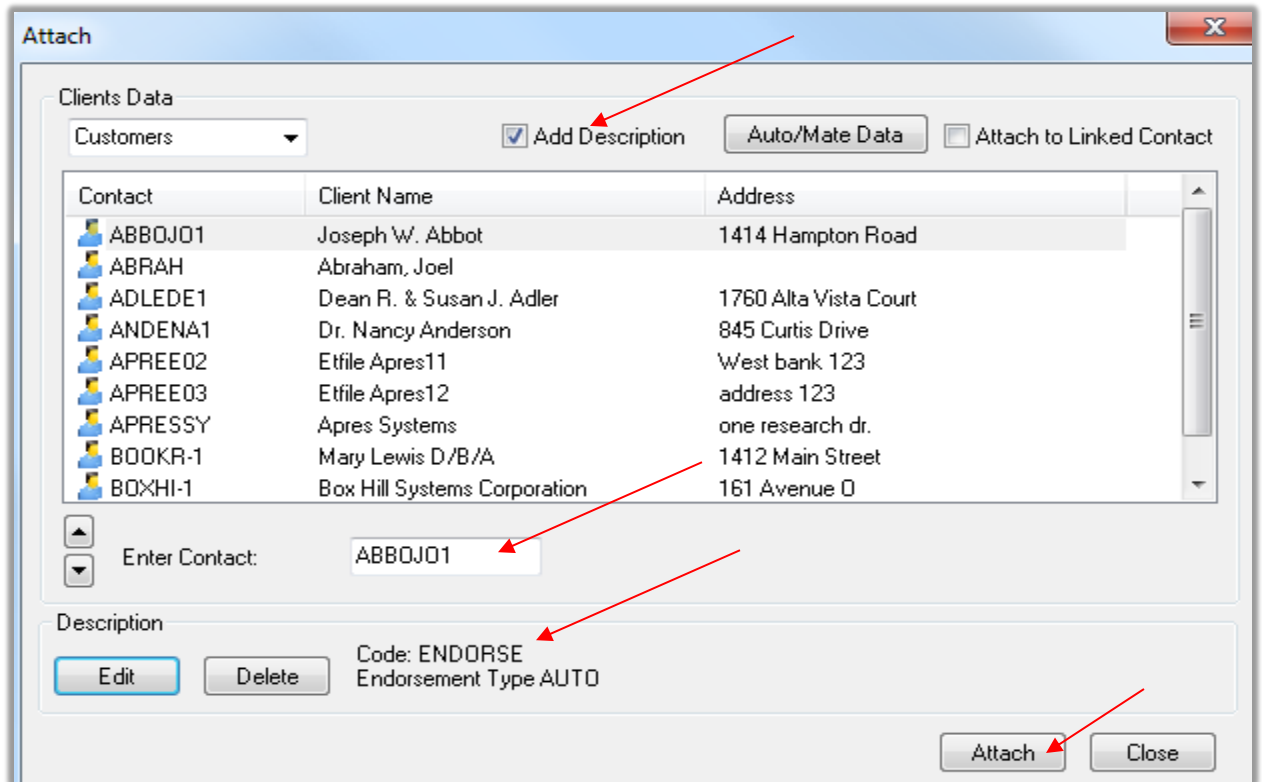

6. Select **Attach** at the bottom right of the **Attach** screen.

7. After you Attach the document, select the document in *etfile* on the left side of the screen in the **FileRoom. T**he **Attached To, Code** and **Description** when in **Contents List** View now should display the correct description information.

## To Attach the Correct Customer and Activity to the Document in *etfile*:

1. Follow the steps above to "**Unattach**" your document in *etfile* from the links to the TAM Client and Activity.

2. Log into TAM. Choose the correct Client and Activity to attach this document to in *etfile*.

3. Choose the last icon on the etfile Toolbar to capture the activity information from TAM

4. In *etfile* **Right Click** the document and choose **Attach and Move.**
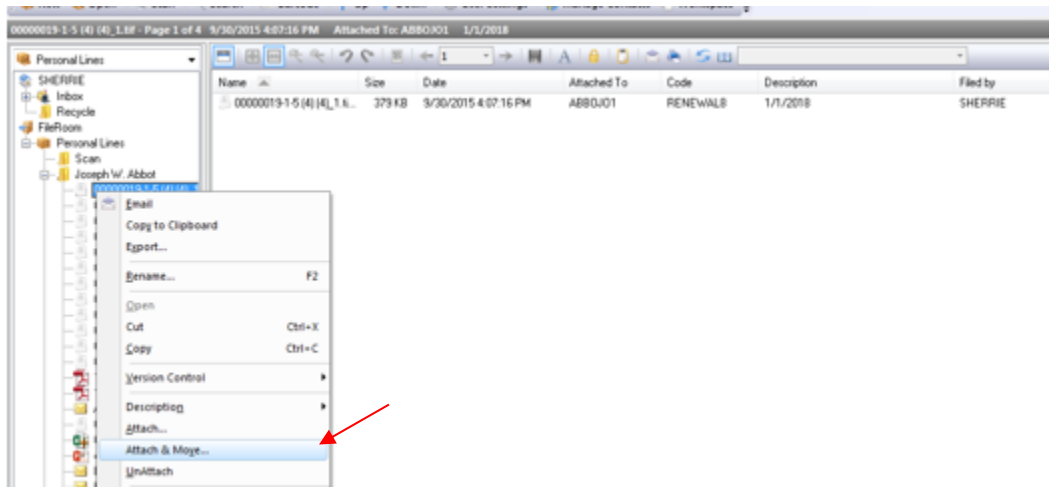
5. The **Attach & Move** Screen appears. Make sure the **Attach to** and **Add Description** boxes are checked off and the correct Customer and Descriptions are displayed. The Description at the bottom left of the screen should not be grayed out and should be displayed in black.   If the **Activity Code** and **Description** do not display on the screen then close this screen and go back to step 1 and repeat the steps.
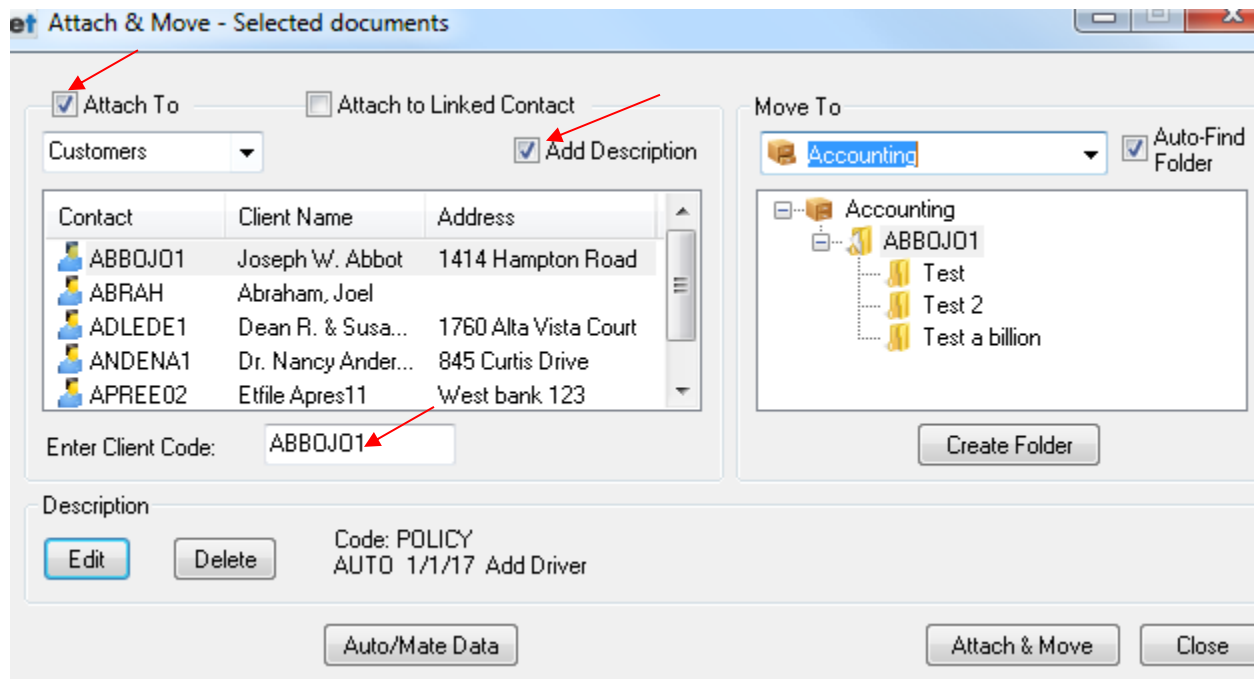
6. If the **Move To** location does not display the correct **Cabinet** click the **drop-down arrow** to choose the correct **Cabinet** to store this document in.
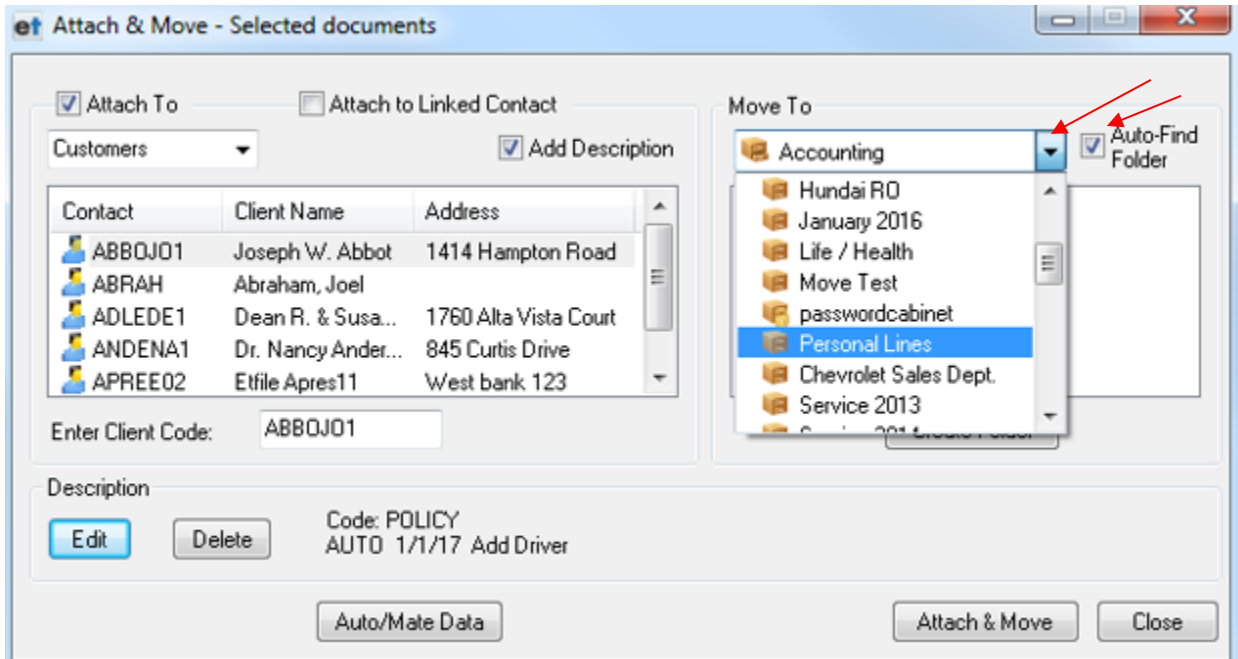
7. Once you select the correct **Cabinet** make sure the **Customer Folder** is displayed below the **Cabinet** to store this document in. Make sure **the Auto-Find Folder** box is selected so if there is already an existing Customer Folder in the Cabinet it will be displayed here. If there is no Customer Folder in the Cabinet (which means you have not filed to this Cabinet for this customer) then choose **Create Folder.**
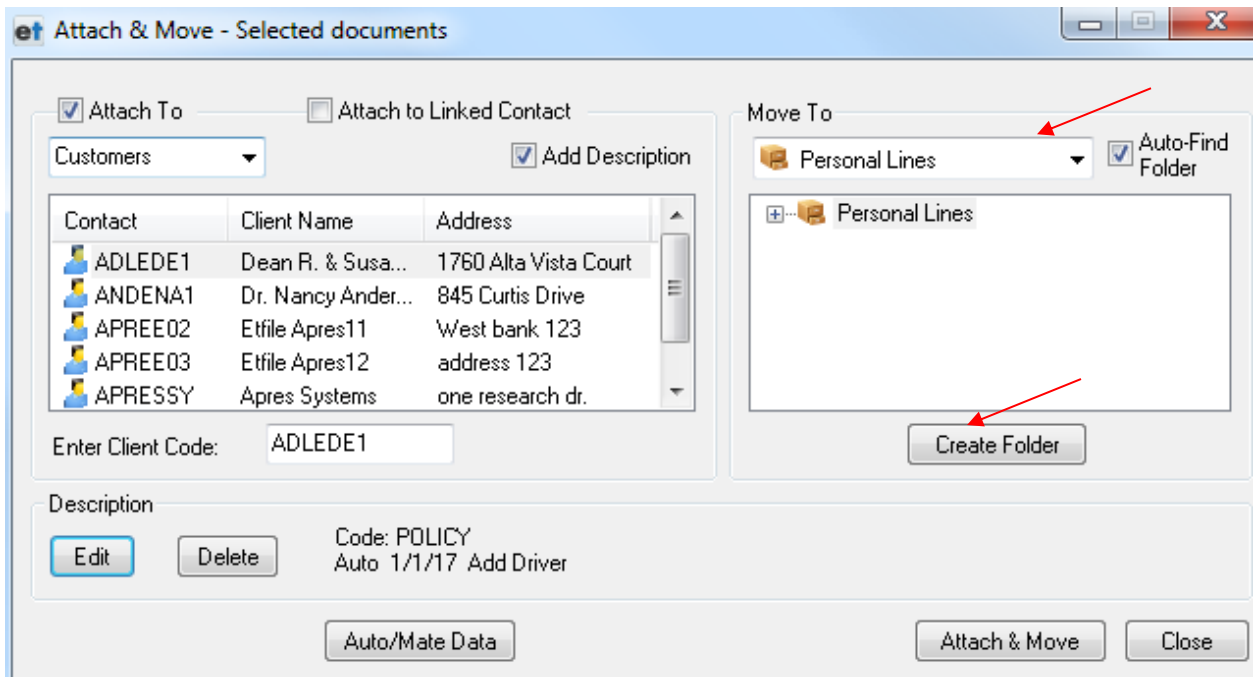
8. The Customer Folder should be appear now under the Cabinet. Choose Attach & Move.
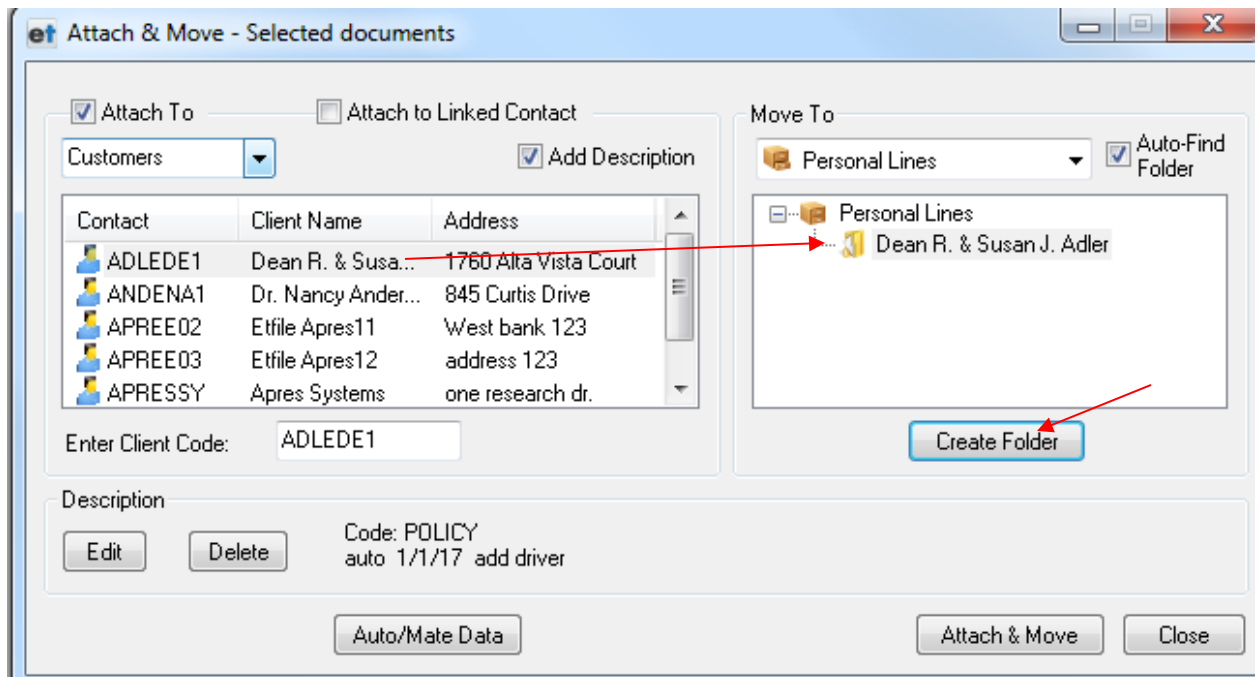
9. To check your work go back to TAM and use the Toolbar to search on the Activity or select the document on the left side in the **FileRoom** and choose **Contents List** View (the first icon on the right side Document Viewing area.) Check to be sure the **Attached To** has the correct **Client Code**, The **Code** is correct and the **Description.**