Linking Documents to a Disability or Tax Benefit

Both the recording of disabilities and of tax benefits require a linked document.

- Open the employee in question.
- In the respective tab (Finances tab - Tax benefits[1] or Employment tab - [2]Disability[3]), put the employee record back into write mode with "Edit".
- Now click the row with the entry to which you want to add a document
- This row is now highlighted in color and 3 active buttons can be seen above the list.
  - "New" creates a new entry / record.
  - "Delete row" deletes this selected entry.
  - "x linked documents" indicates how many documents are linked to this entry.
- Clicking "x linked documents" opens an upload wizard.
- Clicking "Upload" lets you upload the appropriate file(s).
- Clicking the "X" closes this wizard.
- Saving puts the employee record back into read mode.
- In read mode, the "x linked documents" button is also visible to check which documents are linked, but the "Upload" button is inactive.

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Important: Linking between documents and entries is not possible in both directions!

Correct procedure:

- In edit mode, select an entry in the topic-specific tab and then click the "x linked documents" button. This uploads a document, stores it correctly in the folder structure, and links it to the selected entry. An example can be found under: Employment tab - Disability[4].

Procedures that do not work:

- Uploading a document to a certain folder does not automatically create a link to an entry that corresponds to the folder name, since the system could only rarely interpret the intention unambiguously (to which entry if there are several?, etc.).
- Even if you first upload a document to the Documents tab[5] and then go to another tab and want to link an entry there to an already uploaded document, this is not possible!

1. /daisy/webdesk-manual-admin/7770-dsy.html?language=4
2. /daisy/webdesk-manual-admin/7761-dsy.html?language=4
3. /daisy/webdesk-manual-admin/7761-dsy.html?language=4
4. /daisy/webdesk-manual-admin/7761-dsy.html?language=4
5. /daisy/webdesk-manual-admin/7779-dsy.html?language=4