eSign Cloud
Creating Templates: Attachments

Using this Guide

The self-paced learning approach to the implementation of IMM eSign provides an institution with control over the pace at which its employees will learn the materials needed to understand, implement, utilize, and support their solution.

This guide serves as a reference tool as well as a companion guide to the fourth lesson in Stage 4: Creating Templates—Attachments.

You should watch the video located on the lesson page and use this document as a reminder of what you learned and perhaps a place to make notes and identify areas of question or concern.

The guides in this Stage will also include recommended activities for steps that should be taken when setting up your eSign solution.

The lessons in Stage 4 will enable you to:

- More fully document the specifics of the templates and attachments you will be creating
- Create new templates and attachment types
- Be able to discuss the specific needs your institution may have with your IMM specialist

Overview

The goal of Lesson 4 is a focus on Attachments, when they are used, how they are different from templated documents, and how to set them up.

The **eSign document administrators** for your institution **must** pay particular attention to the lessons in Stage 4. However, we also recommend that all members of the project team watch the videos so that everyone knows what is possible, and how templates are managed.

The key elements of lesson 4 are:

- Understand what types of documents will be and can be attachments
- Explore the use cases for adding attachments in branch
- Learn how to create an attachment type
- Explore the use cases for utilizing remote attachments and understand how to set them up

After watching the videos, you should:

- Apply your knowledge of all the elements of an attachment type and how they are used for both in branch and remote sign attachments.
- Be prepared to discuss the creation of templates with your IMM Solution Specialist

Activity Checklist

- Watch the Lesson 4 video
- Use your Implementation Workbook to record the details of attachments you will create in your solution
- With your newfound knowledge, identify at least one (1) attachment type from your document list in your Implementation Workbook and set it up in your eSign solution
- Record any questions your team has for discussion with your IMM Solution Specialist

Attachments

An attachment is essentially any document (or image) **other** than those you are templating that you might want to include in the session. This could include proofs of ID, customer photo, informational materials, titles, proof of insurance, and much more.

In large part, documents that do not need to be signed or initialed often fall into this category – though as we will see in a lesson in Stage 5, it is possible to require review, initialing, or signing on attachments during processing.

Attachments are **not automated** in the way templates are, and therefore when they are being added to a session the user must select information from convenient drop-down menus.

The file types that eSign accepts when a user is uploading an attachment are PDF, JPEG, GIF, BMP, PNG, and TIF.
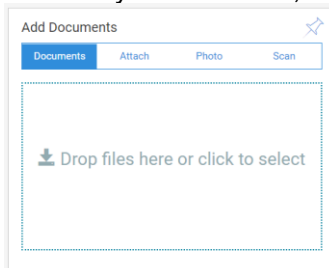
When attachments are used

Attachment types are used during an active session. Importantly, there must be at least one templated document before the user can add an attachment.

The employee may need to add documents that are already electronic – they might be located on their workstation or network location, or they may have received them via email. Alternatively, the signer may be providing documents in hardcopy, in which case they can be scanned in, either directly into eSign or scanned to a file and then attached. And finally, the employee can use a webcam to capture a photo if desired.

When on the Collected Documents page, the user will see the Add Documents panel on the left side of the screen. If the user is already in a ses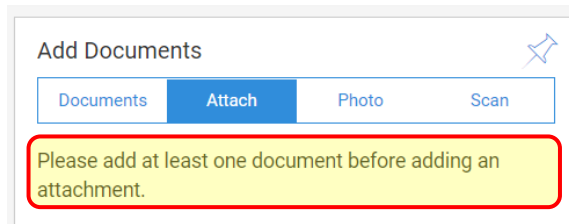sion, they will see an Add Docs button which, when pressed, will bring them to a screen with the same Add Documents panel.

There are four options presented to the user, and sometimes this can be a little confusing. The options are Documents, Attach, Photo, and Scan.

In this case, the **Documents** option means TEMPLATED Documents. So, if you want to add a templated document either to an existing session or to create a new session, you can drag the file here, or click here to browse your workstation or network.
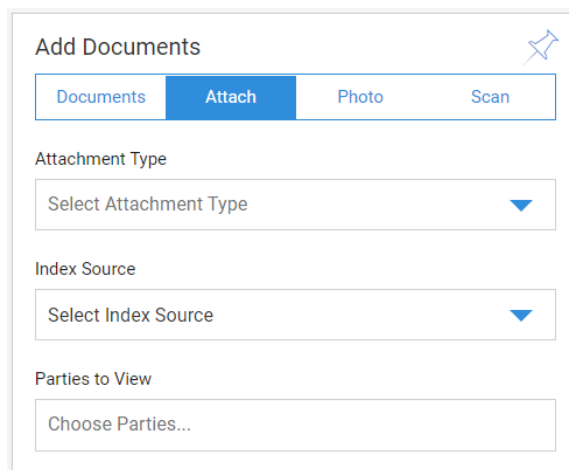
The other THREE options: Attach, Photo, and Scan all refer to **Attachments**, and specifically NOT Templated documents.

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When the user selects Attach and there are no templated documents yet, they will see this message letting them know that there must be at least one **templated** document in the session before Attachments can be added.

Once there is at least one templated document (or if adding an attachment from within an active session), the user sees this:

Attachment Type unlike with Templated documents, the user must select an attachment type from an available list. We will see how to create those below.

Index Source Since there is no automatic index extraction on Attachments, one of the Templated documents will be used to supply indexes to the Attachment and that document is selected here.

Parties to View Determines which signing party or parties will be able to view this attachment during the signing ceremony. The user may select more than one.

The use of these fields will be covered in more detail in the lessons in Stage 5: User Preparedness.

There are cases when the signer themselves may need to add an attachment. This won't be the case with an in-branch signer, but certainly with remote signers, your process may dictate that they upload a copy of their ID, or an image of their proof of insurance, or other relevant document.

When this is the case we must enable those attachment types for remote use, and we will see how to do that later in this lesson.

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Setting up Attachment Types

Attachment Types are set up in the same Documents (RTS) area of eSign Administration as Templates.
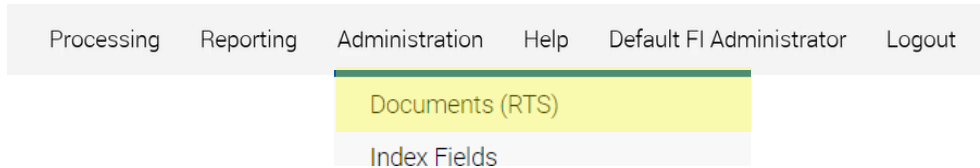
Remember that the Document Maintenance page is where Templates are managed, but it is also where we define Attachment Types.

When on the Document Maintenance page, you'll notice this button bar which includes a Define Attachment button.
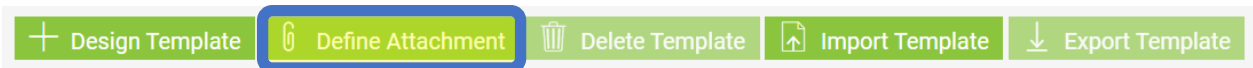
Clicking it opens the Define Attachment dialogue.

Full Name will appear in the lists that users will see as well as in the eSign audit file (can contain alphanumeric characters and dashes and underscores, but NO BLANKS)

Short Name an "internal" database name (can contain alphanumeric characters and dashes and underscores, but NO BLANKS)

Description will appear under the Full Name on the Session Details screen and when adding the Attachment Type to a Remote session. This field can contain any characters as well as blanks and can be more descriptive.

Archive This Yes or No option determines whether documents of this attachment type will be included in the archived documents from the sessions. It may be that something like an ID or

proof of insurance SHOULD be archived, whereas a standard informational sheet or terms and conditions should NOT. You can set that here

Vendor This field will rarely come into play but where applicable reflects the name of the Vendor supplying this type of attachment.

Once all fields are filled in, click SAVE.

The new attachment type will appear in the list of Documents on the Document Maintenance screen and it will have a small paperclip icon next to the Full Name indicating that it is an attachment type.
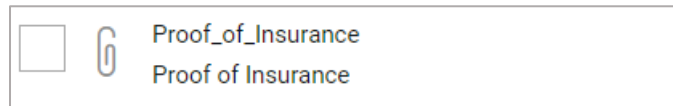
To display a list of Attachment Types on the Document Maintenance screen, select "Attachment" in the Document Type drop down in the search panel and click search.
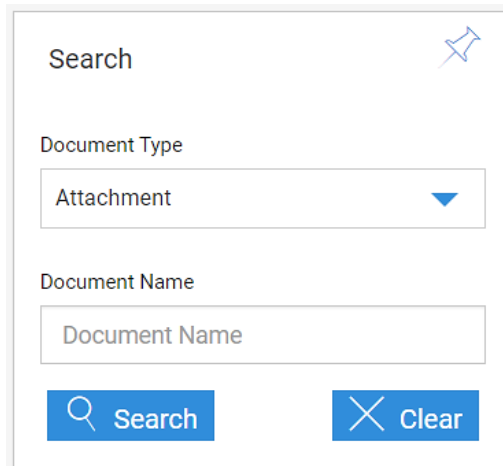

The result list will look something like this:
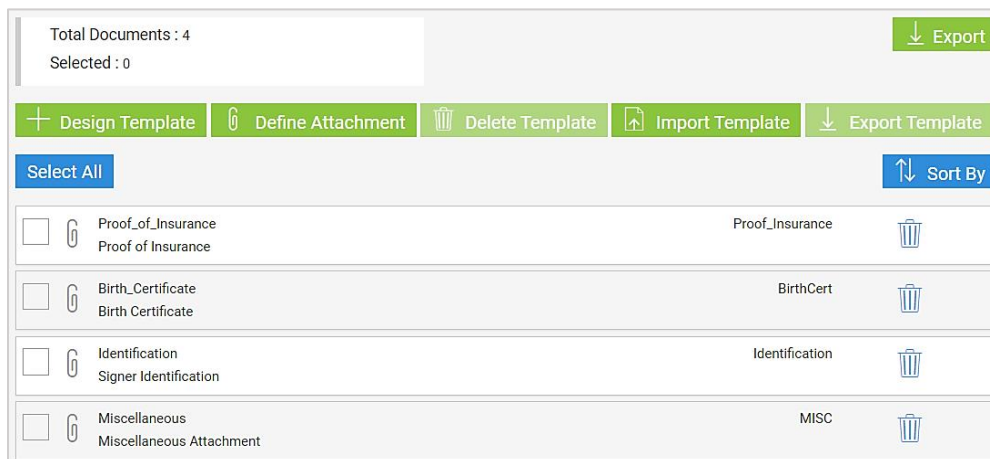
The newly created Attachment Type will now display in the Attachment Type drop down menu for the eSign users.

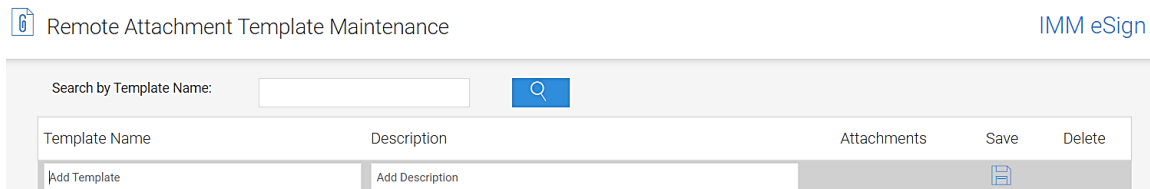IMM eSign

Remote Attachments

If remote signers will be required or requested to add attachments, at least one Remote Attachment Template must be created in eSign.

Prior to creating a Remote Attachment Template, at least one attachment type must be defined. The term template here should not be confused with Document templates. A Remote Attachment Template is a grouping of attachment types that can be associated with discrete business processes (Car Loan, Home Loan, New Account, etc.). When creating one of these Remote Attachment Templates we're essentially making life easier for users by giving them an option in a drop down they can choose when they want to add a remote attachment request to a remote signing party. The attachments will be electronically supplied by the applicant during the signing experience on the Adobe Sign website.

Setting these up is simple. Select Remote Attachment Template from the Administration drop down menu.
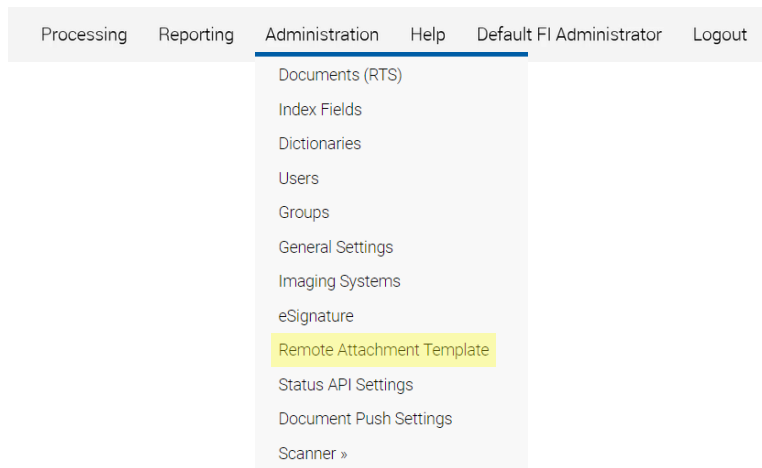
The Remote Attachment Template Maintenance page will open.

Enter values into the fields:

Template Name The name that will appear in the drop-down list for the eSign user. (e.g., New Account Documents)

Description Plain text explanation of what this template might contain or be used for (e.g., Photo ID and Proof of Address)

Click Save icon.

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When you do, your new "template" will be at the bottom of the list of templates, and you will be able to select Attachment Types to add from the drop-down list.

Select an attachment type from the drop-down list, place a check mark in the Required column if this attachment type will be required for this Remote Template type, and click the Save icon. If you need to add additional attachment types, just select the next one and click save until you are done.

When users are sending a session for remote signing, they will be able to request remote attachments by clicking the Request Remote Attachments button on the eSignature Management page.
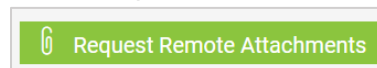
After clicking the button, the user will see a drop-down menu enabling them to select a remote

attachment template. They can then apply the remote attachment template to ANY or ALL remote document signers in the session and they can add additional attachment types to, or remove attachment types from, the request, and make some or all the attachment types required.

This process will be covered in more detail in a lesson in the Stage 5: User Preparedness

Summary

Attachments are not templates but play a critical role in many business processes.

Attachment do not have automation and are *generally* not signed, but they can be, if necessary, and we'll show you how that's done in a lesson in Stage 5.

Attachments are added to a new or existing session by the institution user, or during the signing ceremony by the signer.

Depending on the attachment type and the business process, attachments can be part of the archived documents or not.

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Recommended Activities

Review your Implementation Workbook, specifically the Document tab, with your team and see if there are any updates that should be made based on what you have learned about Attachments.

Identify at least one (1) attachment type from your document list in your Implementation Workbook and set it up in your eSign solution.

Note any questions or concerns you have so that you can ask your IMM Product Expert during the consulting/training session.