Chapter 17

Attachments

IN THIS CHAPTER

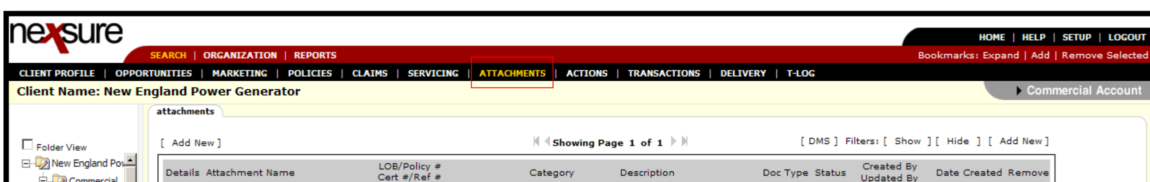
- Adding an Attachment
- Adding a Document with a Template
- Adding a Document without a Template
- Attaching Outlook Messages

Adding an Attachment

Clicking on the **ATTACHMENTS** link at client level or the **attachments** tab from underwriting level provides the ability to add documents to either the client or policy. The type of attachments that may be added are PDF, MSWord, MSExcel, JPG, TIF, BMP, TXT, or GIF with a 25MB limit per attachment.

To add attachments begin by clicking on either the **ATTACHMENTS** link on the **Client** menu to add to the client or the **attachments** tab at underwriting level to add to the selected policy.

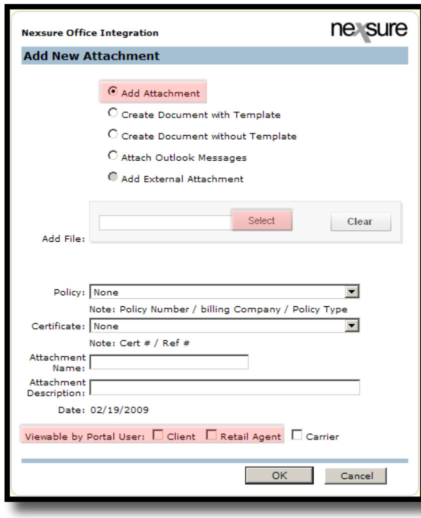
HOW To Add an Attachment at Client Level



- Click the **ATTACHMENTS** link on the **Client** menu. The **attachments** tab defaults to display all attachments for the client. If the **Folder View** is selected, only attachments in the selected folder will display. See section “HOW to Work with Client Level Attachment Folders” in this chapter.

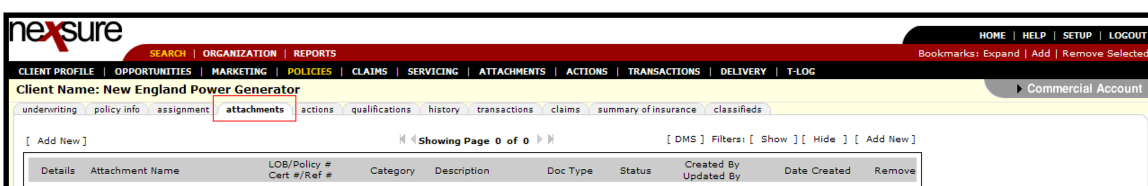
  Note: If an attachment is associated to any restricted policy, that attachment can only be accessed by staff members assigned to the restricted policy.

- Click the **[Add New]** link on the left or right side of the screen to display the **Add New Attachment** pop-up.
- Select the **Add Attachment** option. The dialog box expands to include additional criteria for adding the attachment.



- To search for the document to be attached, click on the **Select** button. Locate and select the document to be attached. Click **Open** in the **Choose File** dialog box to attach the document to the client.
- The **Policy** and **Certificate** boxes default to **None**. An attachment added at Client level may be associated to a specific Policy or Certificate by selecting the applicable Policy or Certificate from the drop-down box. To default to a Policy or Certificate, see "HOW to Add an Attachment at Policy Level" later in this chapter. Attachments added to a Policy or Certificate will be available from the Policy or Certificate's **attachments** tab.
- The **Attachment Name** should be a short name and the **Attachment Description** should include more details about the attachment to describe it.
- The date automatically defaults to the date the attachment is being added.
- Selecting the **Client** and/or **Retail Agent** check boxes will make the attachment available to contacts with rights to access attachments through the **Client** or **Retail Agent Portal**. For information on Portal Access, see "Retail Agent Access", Chapter 1, and "Client Access", Chapter 2, in the *Portal Access Training Manual*.
- Clicking the **OK** button will add the attachment to the selected client. Clicking **Cancel** will abort the attachment.

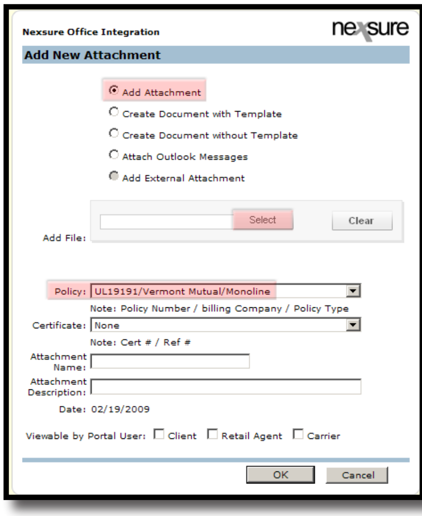
HOW To Add an Attachment at Policy Level



- Click the **attachments** tab at policy underwriting. Attachments that pertain to the policy display. **Folder View** is not available at policy level.

Note: If the policy is restricted, attachments can only be accessed by staff members assigned to the restricted policy.

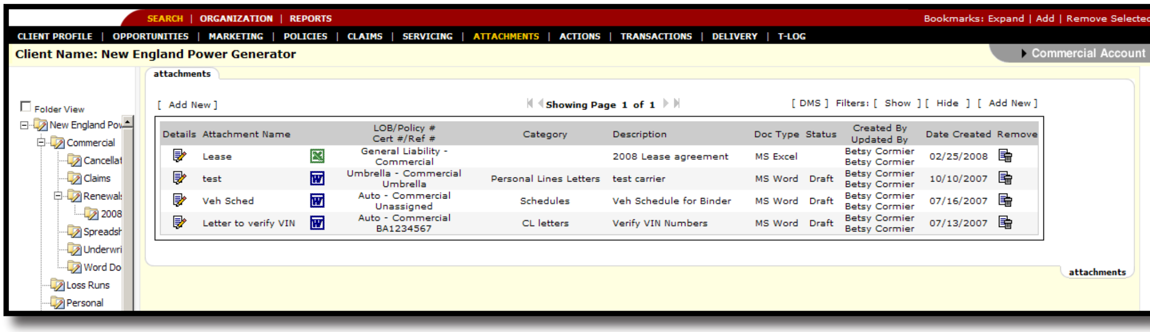
- Click the **[Add New]** link on the left or right side of the screen to display the **Add New Attachment** dialog box.
- Select the **Add Attachment** option. The dialog box expands to include additional criteria for adding the attachment.



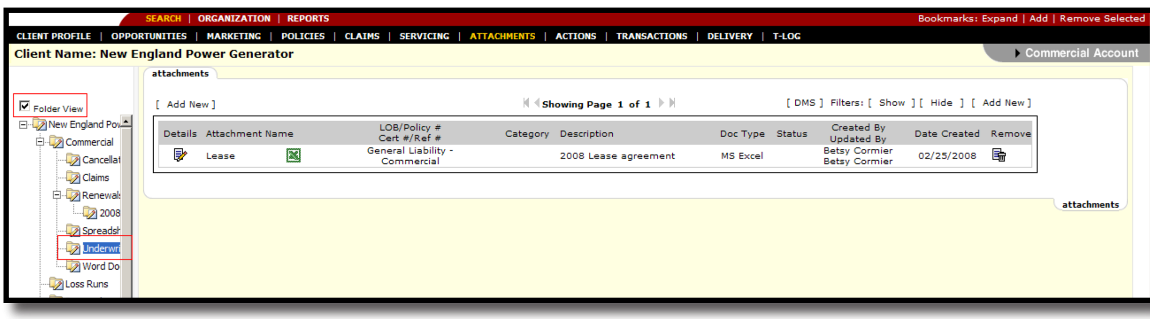
- To search for the document to be attached, click the **Select** button. Locate and select the document to be attached. Click **Open** in the **Choose File** dialog box to attach the document to the client.
- The **Policy** selection defaults to the policy on the **underwriting** tab. A different policy may be selected. The **Certificate** field defaults to **None**. To attach a document to a certificate, click the **attachments** tab in the certificate.
- The **Attachment Name** should be a short name and the **Attachment Description** should include more details about the attachment to describe it.
- The date automatically defaults to the date the attachment is added.
- Selecting the **Client** and/or **Retail Agent** check boxes will make the attachment available to contacts with rights to access attachments through the **Client** or **Retail Agent Portal**. For information on Portal Access, see “Retail Agent Access”, Chapter 1, and “Client Access”, Chapter 2, in the *Portal Access Training Manual*.
- Clicking the **OK** button will add the attachment to the selected client. Clicking **Cancel** will abort the attachment.

HOW To Work With Client-Level Attachment Folders

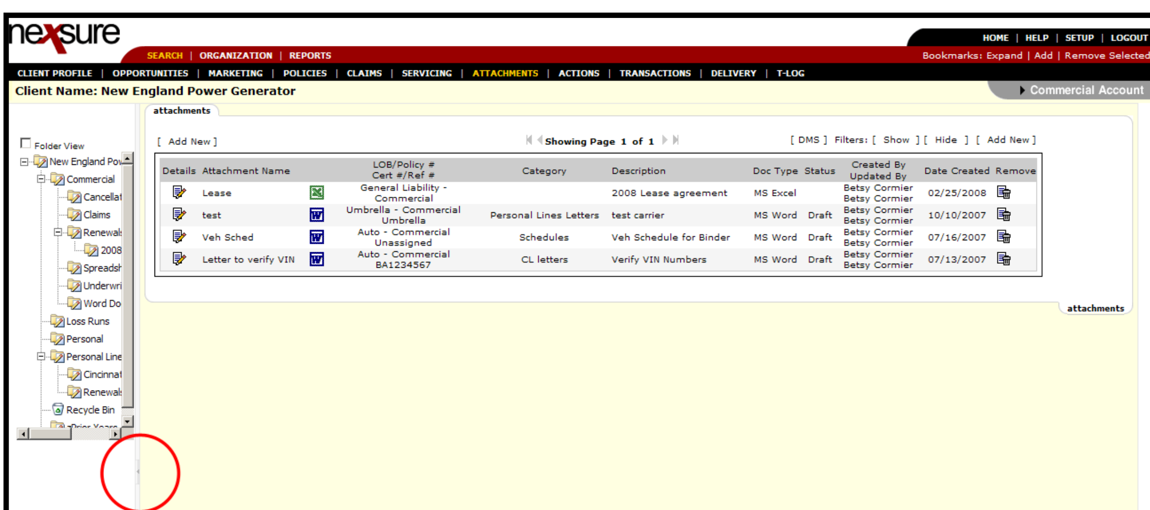
Attachment folders are available to organize a high volume of client attachments. To view folders, click **ATTACHMENTS** link on the **Client** menu. When the client **attachments** tab is first displayed, all attachments for the selected client are shown. The **Folder View** panel is on the left of the attachment summary.



- Once a folder is selected, the **Folder View** check box is automatically selected indicating that only attachments for the selected folder are displayed. To return to the default view of all attachments, deselect the **Folder View** check box.



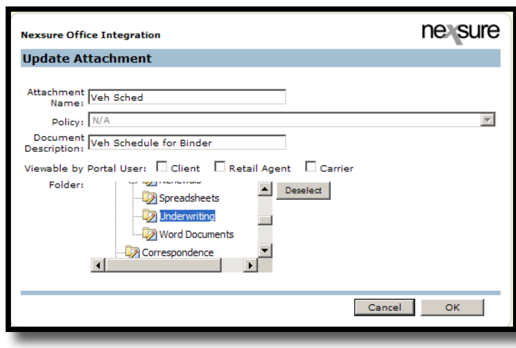
- The **folder** panel can be closed by clicking the collapse/expand button on the vertical scroll bar. This button acts as a toggle for the **folder** panel. The **folder** panel may be re-sized by placing your cursor on the vertical scroll bar until it turns into a double headed arrow. Drag the scroll bar to the left or right to re-size the panel.



By default, each client has a **client folder** containing all client attachments and a **Recycle Bin**. Up to 100 folders per organization can be added. Folders are cross-organizational. Any folders added for one client will show for all clients in the organization. Only staff members with security rights for addition, deletion, or modification of **folders** can respectively add, copy, delete or rename a folder. Rights to add a folder includes the rights to copy a folder. For information about adding and maintaining attachment folders, see "Attachment Folder Setup", in Chapter 10, Admin Training Manual.

- Attachments are deleted by clicking the **Remove** icon. Deleted attachments are added to the **Recycle Bin** in the **folder** panel. Once the attachment is in the **Recycle Bin**, the **Remove** icon can again be clicked and the attachment is removed from Nexsure. Security templates control the ability to delete attachments from Nexsure.

- Attachments can be added to a folder or moved to another folder by clicking the document type icon on the **attachments** tab to the right of the **Attachment Name**. The **Update Attachment** dialog box is displayed. In the **Folder** area, select the folder to which the attachment is to be added or moved. The folder is highlighted. If a folder is selected in error, click the **Deselect** button. Click **OK** to add or move the attachment to the folder. Click **Cancel** to abort.

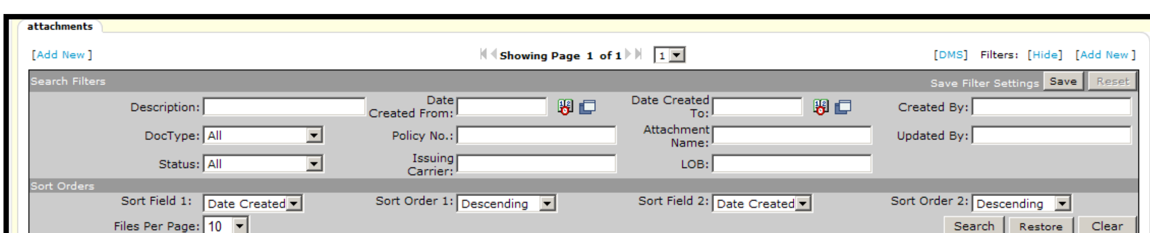


HOW To View an Added Attachment

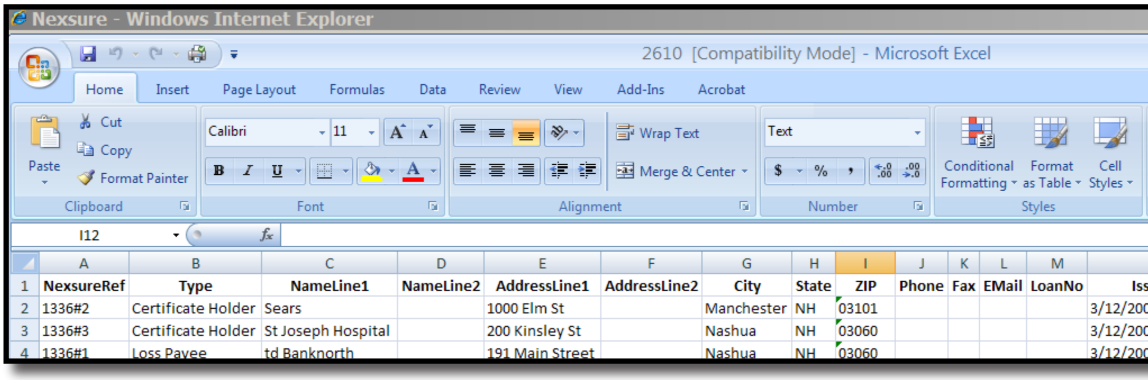
- While on either the Client-level attachments or policy-level attachments, use the **[Show]** link to search for an attachment when there are more than just a few. The **Search** and **Sort Filters** will display by default if saved search criteria does not find any attachments. Once displayed, the **Search Filters** will remain open until closed by clicking the **[Hide]** link.

Note: **Search** and **Sort Filters** criteria can be customized and saved as a personal default view of attachments. For instructions, see "HOW to Customize Default Filter Settings for Attachments" later in this chapter.

- Enter some information about the attachment and click the **Search** button to return search results.

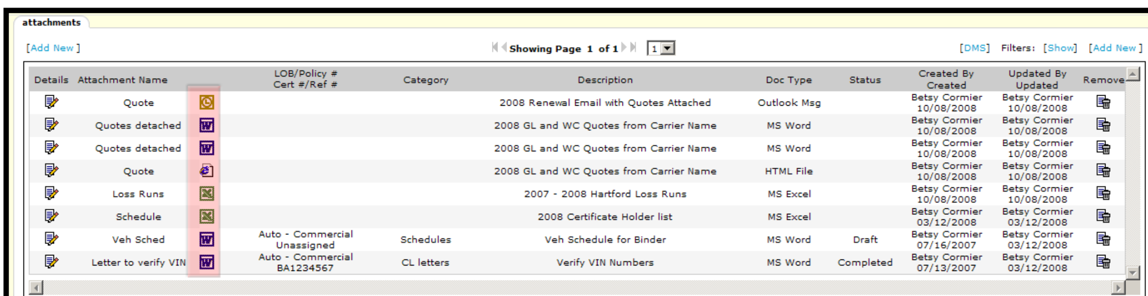


- Click the **Details** icon of the attachment to view the document. If an attachment is associated with any restricted access policy, that attachment can only be accessed by people that are assigned to the restricted policy.



HOW to Modify the Added Attachment

- Click the icon to the right of the **Attachment Name** to modify the attachment.



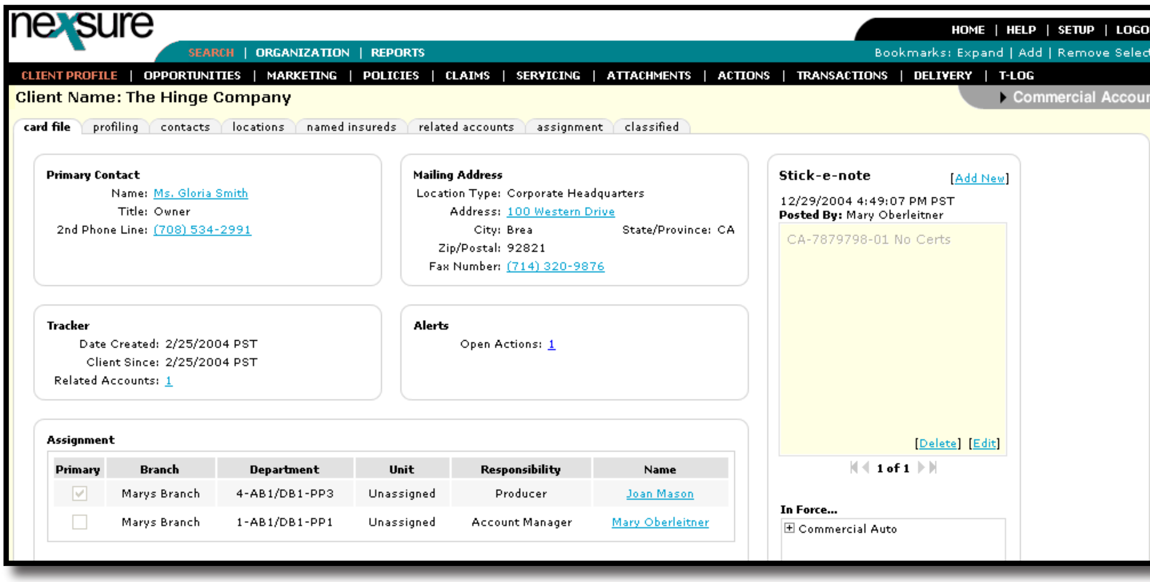
- The **Update Attachment** dialog box displays. Make changes to the **Attachment Name**, **Policy** association, **Document Description**, Portal Access and/or **Folder** placement. The **Deselect** button is used to deselect the current **Folder** selection.
  - If an attachment is associated to a restricted access policy, the Attachment Name can only be modified by people that are assigned to the restricted policy.
  - Policy association cannot be changed on Outlook Messages, Documents created with or without a Template or attachments added to policies that have been changed.
- Click **OK** to save the changes. Click **Cancel** to abort changes to the attachment.

Notes

Adding a Document with a Template

HOW to Merge a Document Template at Client/Policy Level

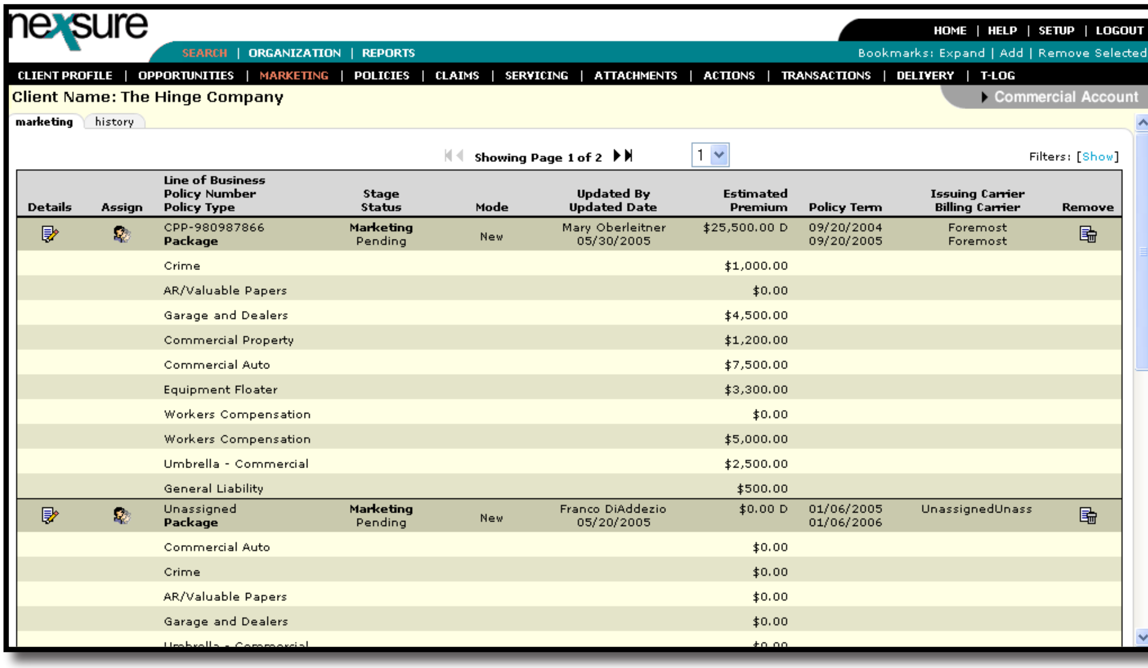
- After searching for the client from **SEARCH** on the **Primary** menu, click the **Details** icon beside the entity (Suspect, Prospect or Client). The client's card file is displayed.



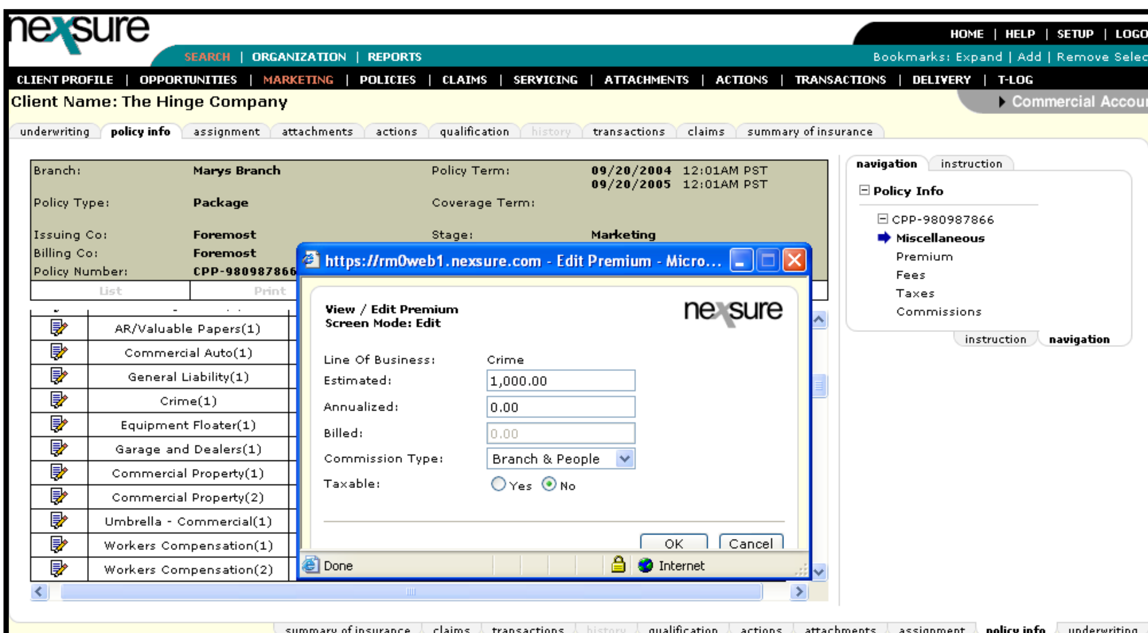
- Document templates may either be added from the Client, Policy or Certificate level.
  - To add from the client level, click the **ATTACHMENTS** link on the **Client** menu.
  - To add from policy level, click on **MARKETING** to access marketing or **POLICIES** to access policies. From the policy or marketing record, click the **attachments** tab.
  - To add from certificate level, click **POLICIES** on the **Client** menu and the **certificates** tab. From the certificate record, click the **attachments** tab.

In this example a proposal for marketing quotes will be shown.

- After clicking on the **MARKETING** link on the **Client** menu the marketing summary is displayed.

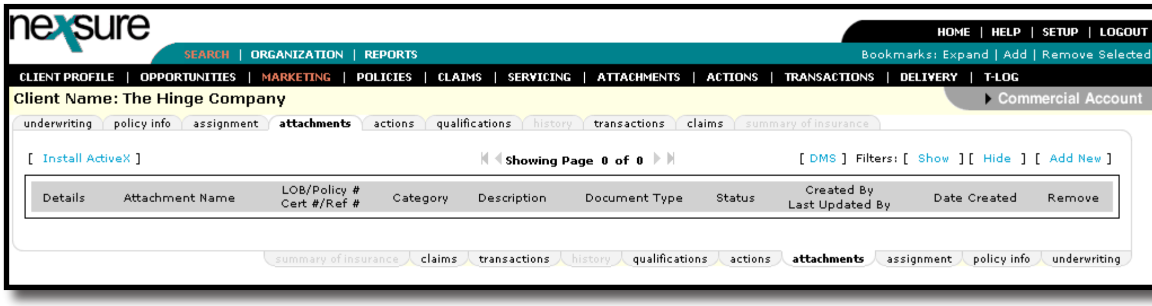


- Click the **Details** icon of the quote to merge with the template and the underwriting screen will be displayed. Since the estimated premium is now included in the fields that can be merged with the template, make sure to enter the estimated premium on the policy info page.

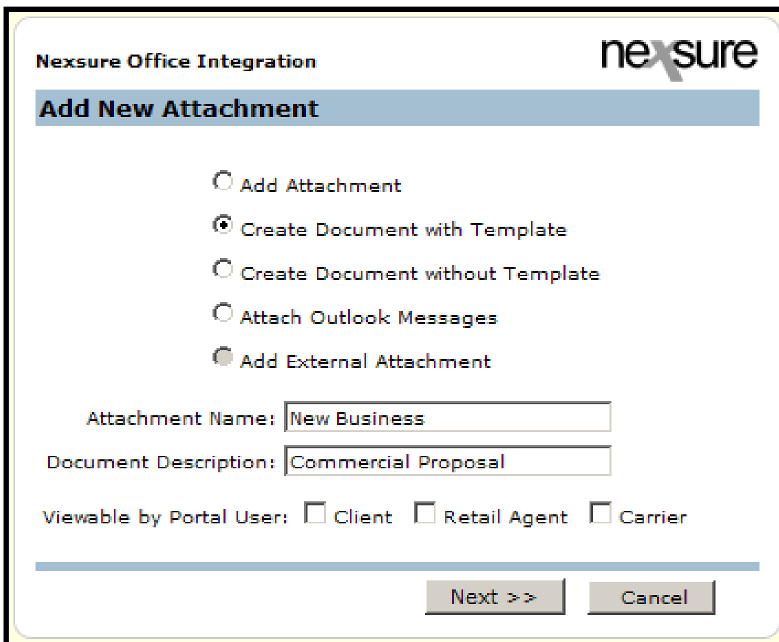


Note: Policy info fields that can be found in Office Integration Nexsure fields are: **Estimated Premium**, **Annualized Premium**, **Billed Premium**, and **Total Estimated Premium**.

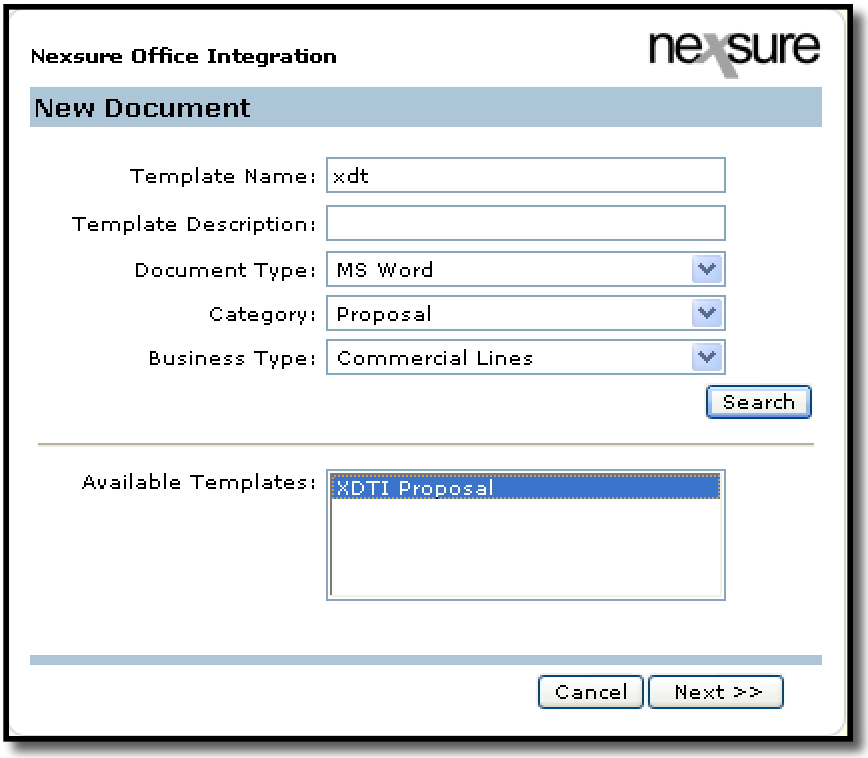
- After completing all form and policy info fields, click the **attachments** tab to display the attachments summary view.



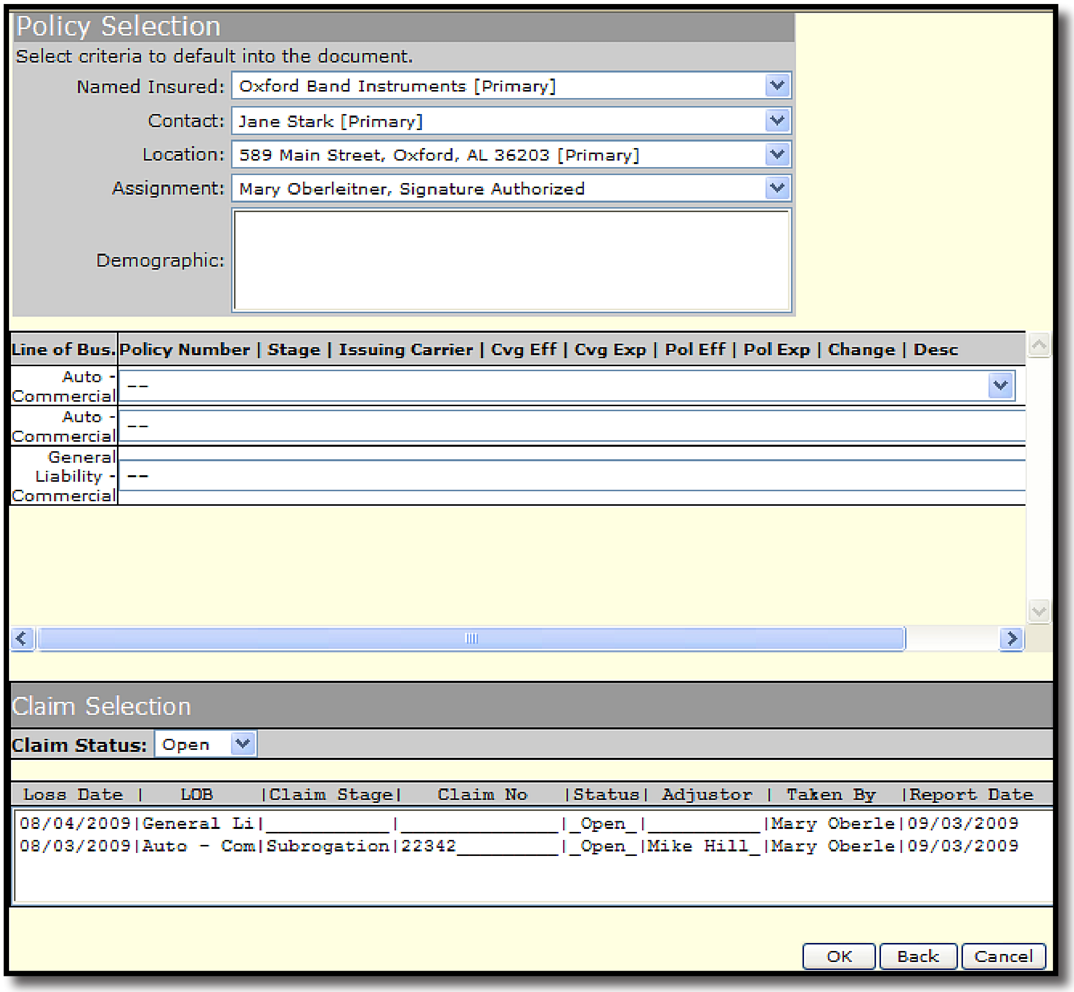
- To add a new document, click the **[Add New]** link located in the upper right corner of the screen to launch the **Add New Attachment** window.
- Click the **Create Document with Template** option to merge data with a template created in **SETUP** by the Nexsure Administrator.
- Enter an **Attachment Name** that identifies the document and then a brief **Document Description** to include more details about the attachment.



- Click the **Next** button to display the document template search screen.



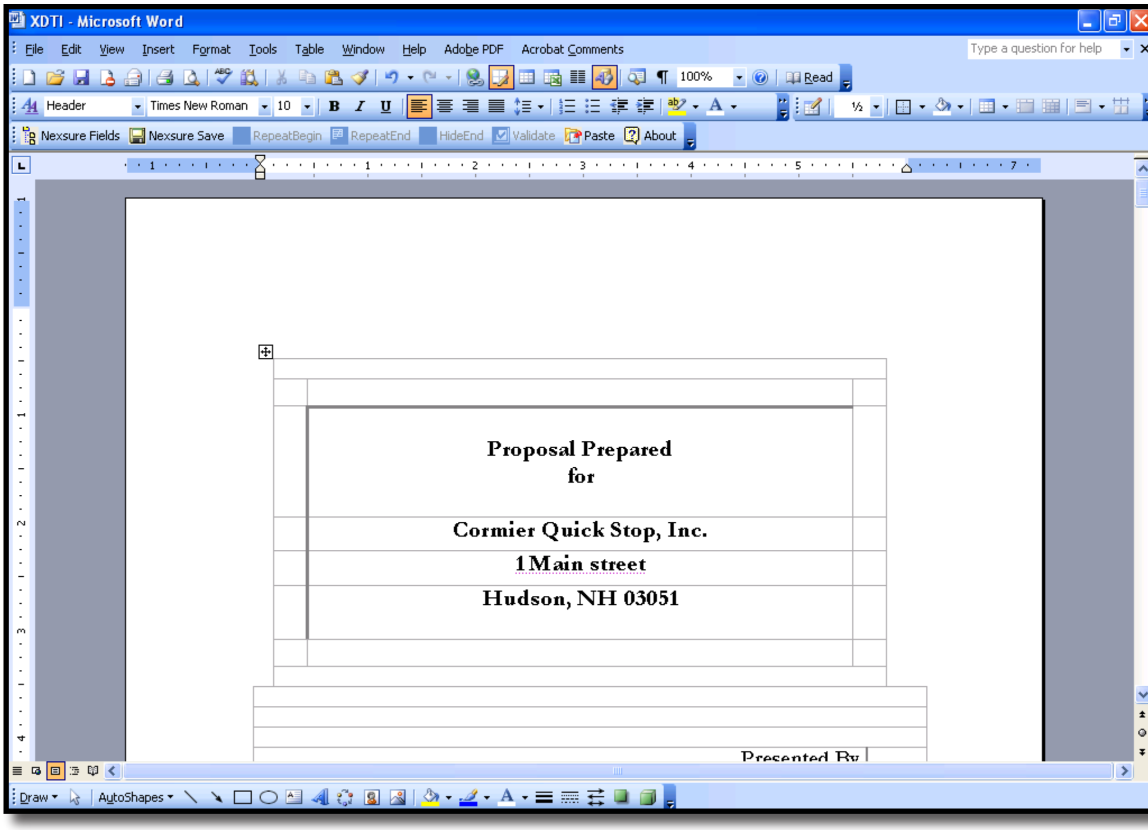
- Use the drop-down boxes, Template Name and Template Description to help filter through the list of document templates that have been created.
- Click the **Search** button to search for the document. The available template matches are displayed in the Available Templates window.
- Select the template by clicking it once.
- Click **Next** to display the lines Policy Selection window.



- At the top of the screen, make sure to select if multiples exist, the following:
  - Named Insured
  - Contact
  - Location
  - Assignment
- At the bottom of the screen if the document being merged is for a claim, locate the claim and click to highlight one selection. Both a line of business and claim may be selected or separately as needed. By default the open claims are displayed. Change the status to closed or all as needed to locate the claim to be included.

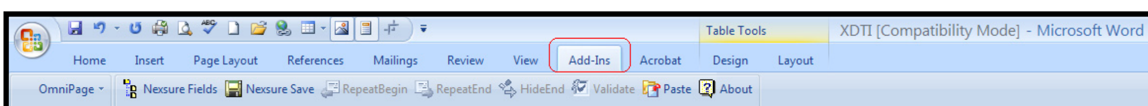
It is important to make these selections because these are the choices that will be available in the XML tree for selection as well as what will merge into the document template if these fields were used.

- Clicking on the **OK** button will launch Microsoft Word and begin merging the data.
- Clicking the **Back** button will display the previous screen and clicking the **Cancel** button will abort the process.

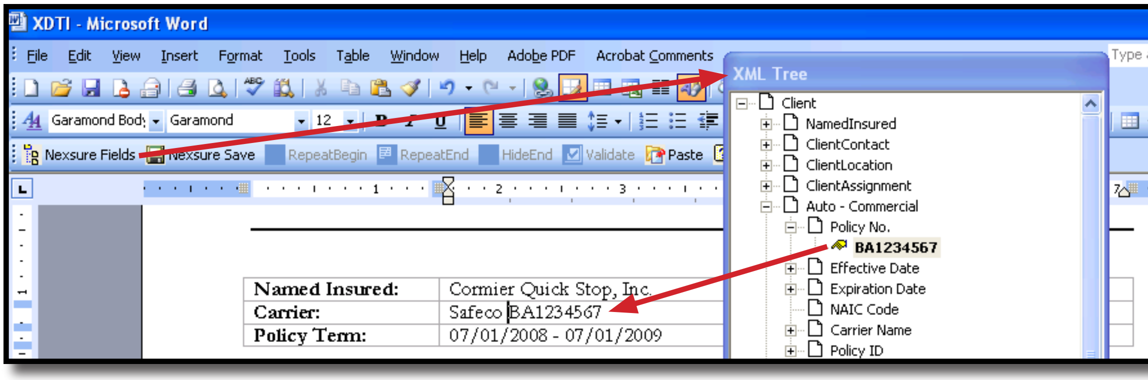


- Click the Nexsure Fields button to display the XML tree which contains the data from the form, client and policy header.

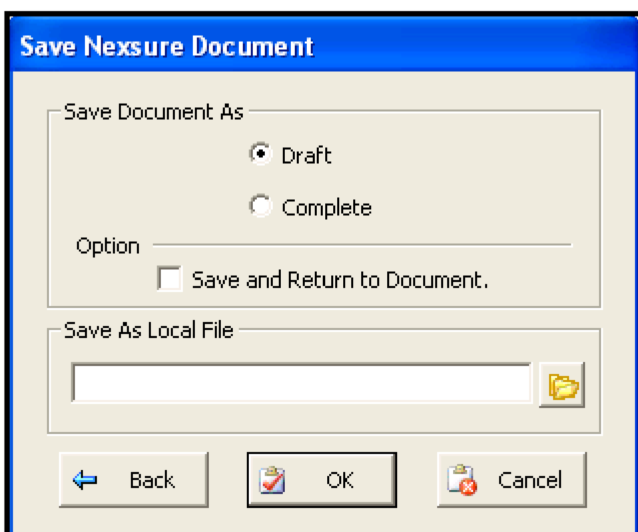
Note: Microsoft Office Word 2007 displays **Nexsure Fields** and **Nexsure Save** buttons under the **Add-Ins** tab.



- Click on the **+** to expand the tree, place the pointer where data is to be inserted from the client or policies, then click the data and drag it into the document.



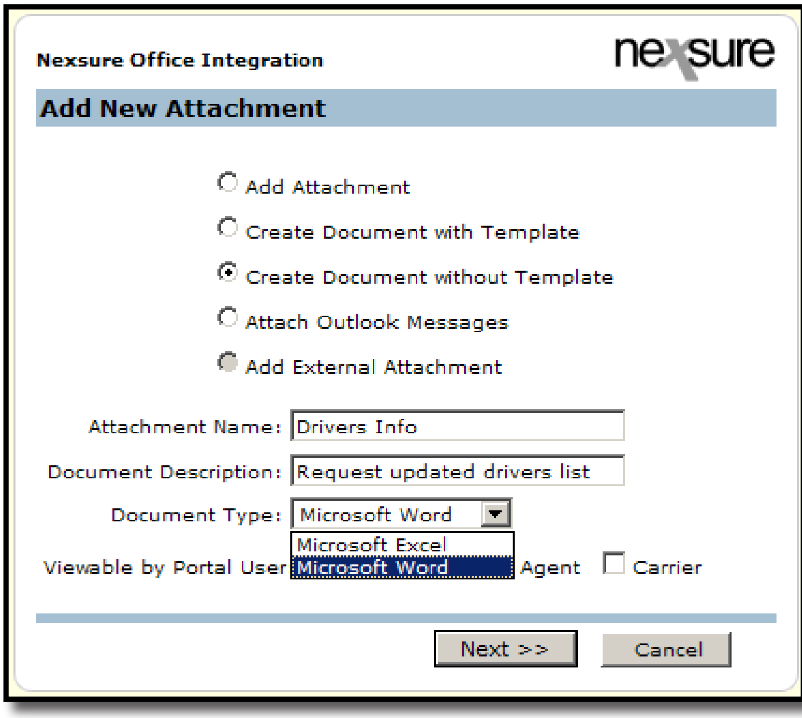
- Make any other modifications necessary. The document may be printed normally by clicking the Printer icon (or click **File** from the menu and select **Print**).
- To save the document to the client account, click the **Nexsure Save** button. Below are the **Nexsure Save** options:
  - Selecting **Draft** allows additional editing of the document to be done at a later time.
  - Selecting **Complete** saves the document and no further edits to the document can be made. The document will be opened in an Internet Explorer window the next time it is accessed.
  - Check the **Save and Return to Document** box to save changes and return you to the document you are editing. Click **OK** to complete the process.
  - **Save As Local File** box allows you to name and save a copy of the document outside of Nexsure. Click the **Folder** button to identify where the document is to be saved. Click **OK** to complete the process.
  - To abort the save process and go back to the document, select the **Back** button.
  - To abort the document entirely, click the **Cancel** button and on the next pop-up, click the **OK** button and the document will not be kept.



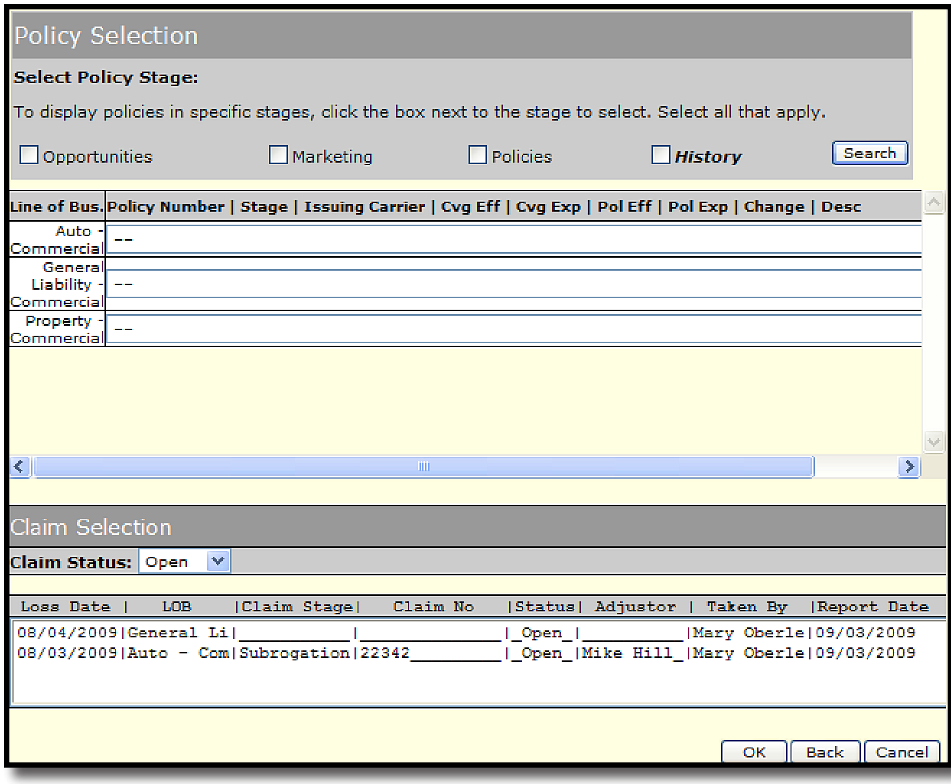
HOW to Add a Document to a Client When a Template Doesn't Exist

If a document template meeting the necessary requirements doesn't exist, perform the following steps to create a document without a template:

- Select **Create Document without Template**.

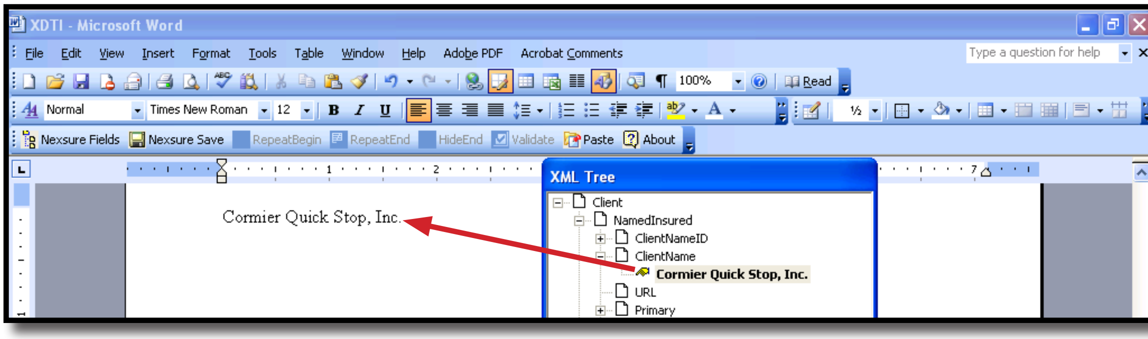


- Enter an **Attachment Name** and a **Document Description**.
- Choose the **Document Type**: Microsoft Word or Microsoft Excel.
- Click the **Next** button to continue.

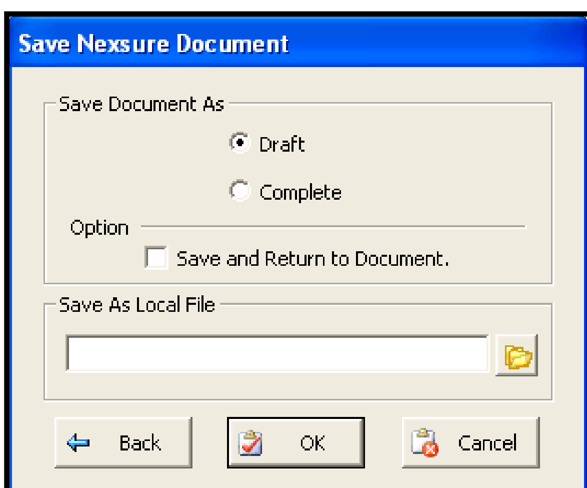


- When adding the attachment at the Client level as in this example, notice that the policy number is not listed by default and that the select policy screen has a slightly different header. This header is used to search for policies the letter may be for. By default all of the policies are displayed.
  - To filter and select only those policies in force, click the **Policies** option and click **Search**.
  - To filter for only in force and history policies, click **Policies** and **History** and click **Search**.
  - To filter the list to display marketing policies, select the **Marketing** option.
  - To add history, click the **History** option and click **Search**.
  - To include opportunities, click the **Opportunities** option.
- After filtering the list use the drop-down boxes and select all policies to be included in the document. Here you may select more than one policy by choosing multiple lines of business.
- At the bottom of the screen if the document being merged is for a claim, locate the claim and click to highlight one selection. Select the line of business if needed. By default the open claims are displayed. Change the **Claim Status** to **Closed** or all as needed to locate the claim to be included.
- Click the **OK** button to launch the Microsoft Word or Excel document.
- Once the document is launched, begin typing the document.
- Click the **Nexsure Fields** button to access the data fields found on the client and selected policies. Coverage information for restricted access policies is available only if the person logged on is assigned to the restricted policy.

- Place the cursor in the document where the field should be dropped.
- Click the field and drag it to the document and then let go of the mouse button to drop the field to the document.



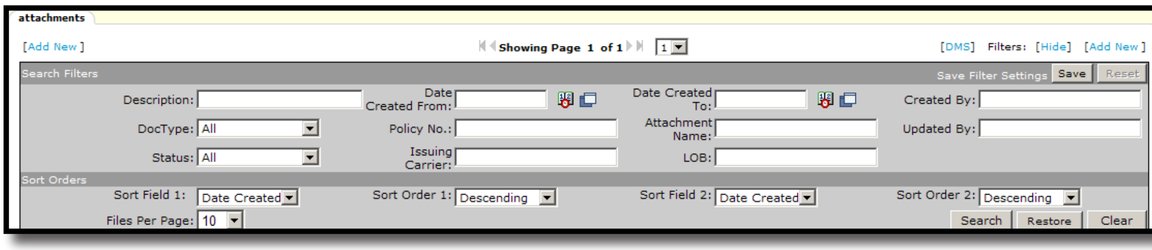
- After completing the document, print the document as it would normally be done in the Microsoft product.
- To save the document to the client account, click the **Nexsure Save** button.
  - Selecting **Draft** allows additional editing of the document to be done at a later time.
  - Selecting **Complete** saves the document and no further edits to the document can be made. The document will be opened in an Internet Explorer window the next time it is accessed.
  - Check the **Save and Return to Document** box to save changes and return you to the document you are editing. Click **OK** to complete the process.
  - **Save As Local File** box allows you to name and save a copy of the document outside of Nexsure. Click the **Folder** button to identify where the document is to be saved. Click **OK** to complete the process.
  - To abort the save process and go back to the document, select the **Back** button.
  - To abort the document entirely, click the **Cancel** button and on the next pop-up, click the **OK** button and the document will not be kept.



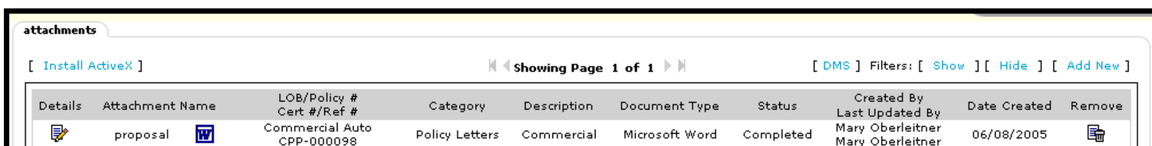
HOW to View a Merged Template or Document Without a Template After Adding

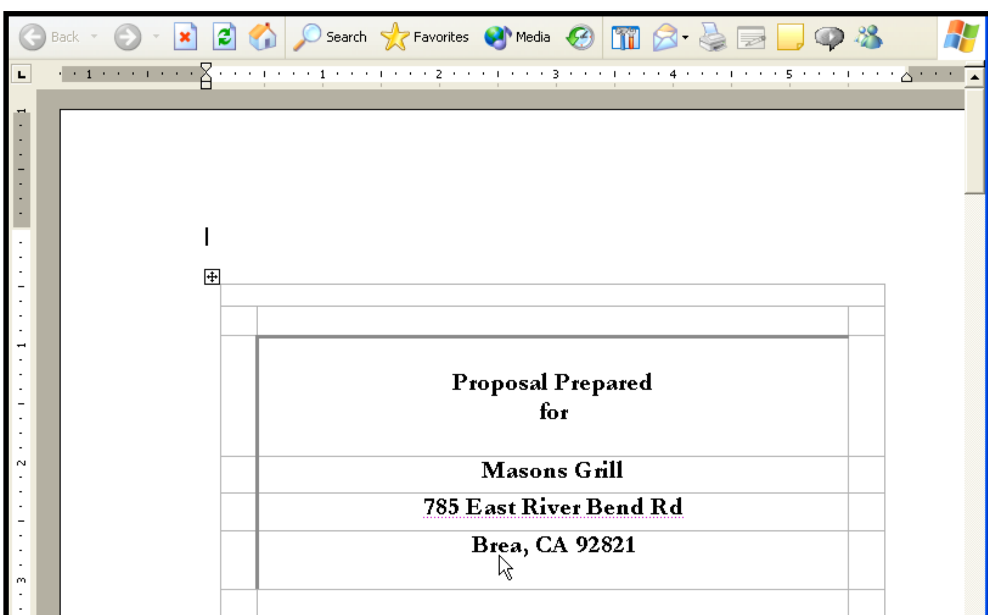
While on either the Client level attachments or underwriting attachments, use the **[Show]** link to search for an attachment when there are more than just a few. Enter some information about the attachment and click the **Search** button to return search results. The **Search** and **Sort Filters** will display by default if saved search criteria does not find any attachments. Once displayed, the **Search Filters** will remain open until closed by clicking the **[Hide]** link.

> **Note**: **Search** and **Sort Filters** criteria can be customized and saved as a personal default view of attachments. For instructions, see "HOW to Customize Default Filter Settings for Attachments" later in this chapter.

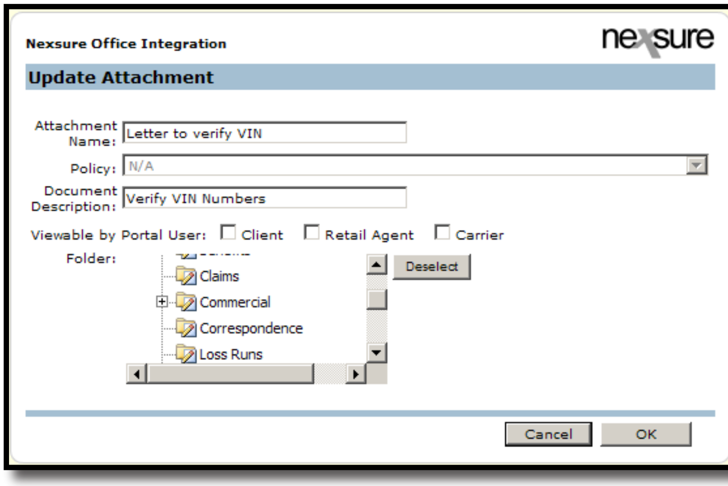


Click the **Details** icon of the attachment to view the document. If an attachment is associated with any restricted access policy, the attachment can only be viewed by people that are assigned to the restricted policy.





- Click the icon to the right of the **Attachment Name** to modify the attachment.

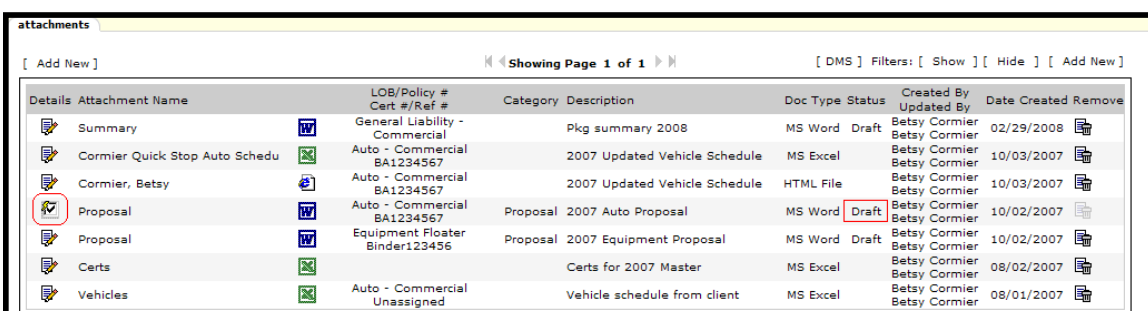


- The **Update Attachment** dialog box displays. Make changes to the **Attachment Name**, **Document Description**, Portal Access and/or **Folder** placement. The **Deselect** button is used to deselect the current **Folder** selection.
  - If an attachment is associated to a restricted access policy, the Attachment Name can only be modified by people that are assigned to the restricted policy.
  - Policy association cannot be changed Documents created with or without a Template.
- Click **OK** to save the changes. Click **Cancel** to abort changes to the attachment.

HOW to View a Draft Document

Documents on the **attachments** tab can be checked out by a staff member for editing if the Nexsure document is saved in draft form. The check-out process enables multiple staff members to be aware that a document is being edited. The initial staff member that checks out the document can make changes and save the document. If a second staff member accesses the same document while the first staff member is still editing the document, the second staff member will get a read-only copy of the document.

- On the **attachments** tab, click the **Details** icon next to the draft document to check it out. The document will be available for editing. Other staff members that try to access the same document will see a **Checked Out** icon in the place of the **Details** icon on the **attachments** summary. The name of the staff member that has checked out the document is displayed in the **Updated by** column. The staff member's name is a hyperlink. Click the hyperlink to display the staff member's contact information.



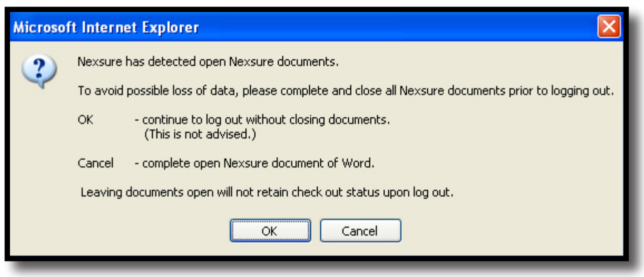
attachments

[Add New] Showing Page 1 of 1 [DMS] Filters: [Show] [Hide] [Add New]

Details	Attachment Name	LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Updated By	Date Created	Remove
	Summary	General Liability - Commercial		Pkg summary 2008	MS Word	Draft	Betsy Cormier Betsy Cormier	02/29/2008	
	Cormier Quick Stop Auto Schedu	Auto - Commercial BA1234567		2007 Updated Vehicle Schedule	MS Excel		Betsy Cormier Betsy Cormier	10/03/2007	
	Cormier, Betsy	Auto - Commercial BA1234567		2007 Updated Vehicle Schedule	HTML File		Betsy Cormier Betsy Cormier	10/03/2007	
	Proposal	Auto - Commercial BA1234567	Proposal	2007 Auto Proposal	MS Word	Draft	Betsy Cormier Betsy Cormier	10/02/2007	
	Proposal	Equipment Floater Binder123456	Proposal	2007 Equipment Proposal	MS Word	Draft	Betsy Cormier Betsy Cormier	10/02/2007	
	Certs			Certs for 2007 Master	MS Excel		Betsy Cormier Betsy Cormier	08/02/2007	
	Vehicles	Auto - Commercial Unassigned		Vehicle schedule from client	MS Excel		Betsy Cormier Betsy Cormier	08/01/2007	

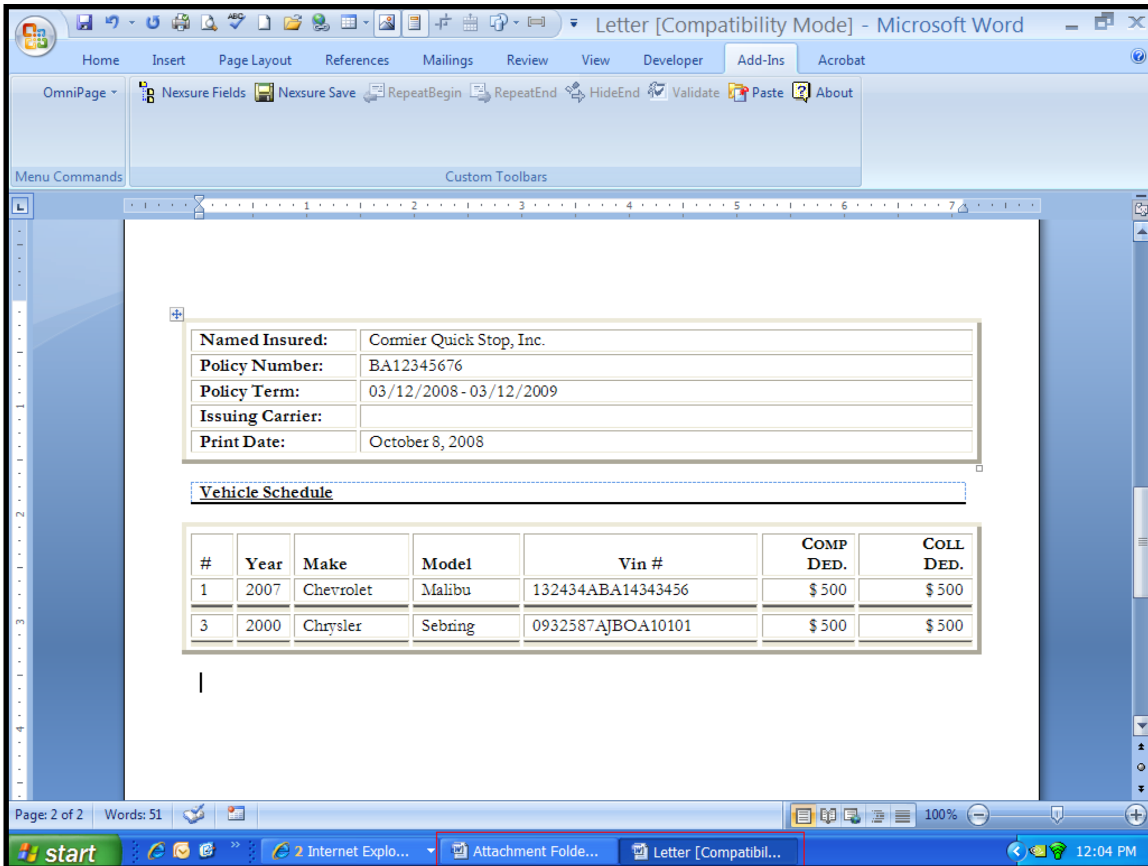
- The document can still be viewed by a second staff member in a read-only copy.
- The document remains checked out until the initial staff member clicks the **Close [X]** icon in the document, selects **Nexsure Save** and exits the document or selects **Nexsure Save > Cancel > OK** to exit the document without saving changes.

Important: The following prompt is displayed if all office integration documents are not closed at the time of log out. To avoid any loss of data, close all office integration documents before logging out of Nexsure.



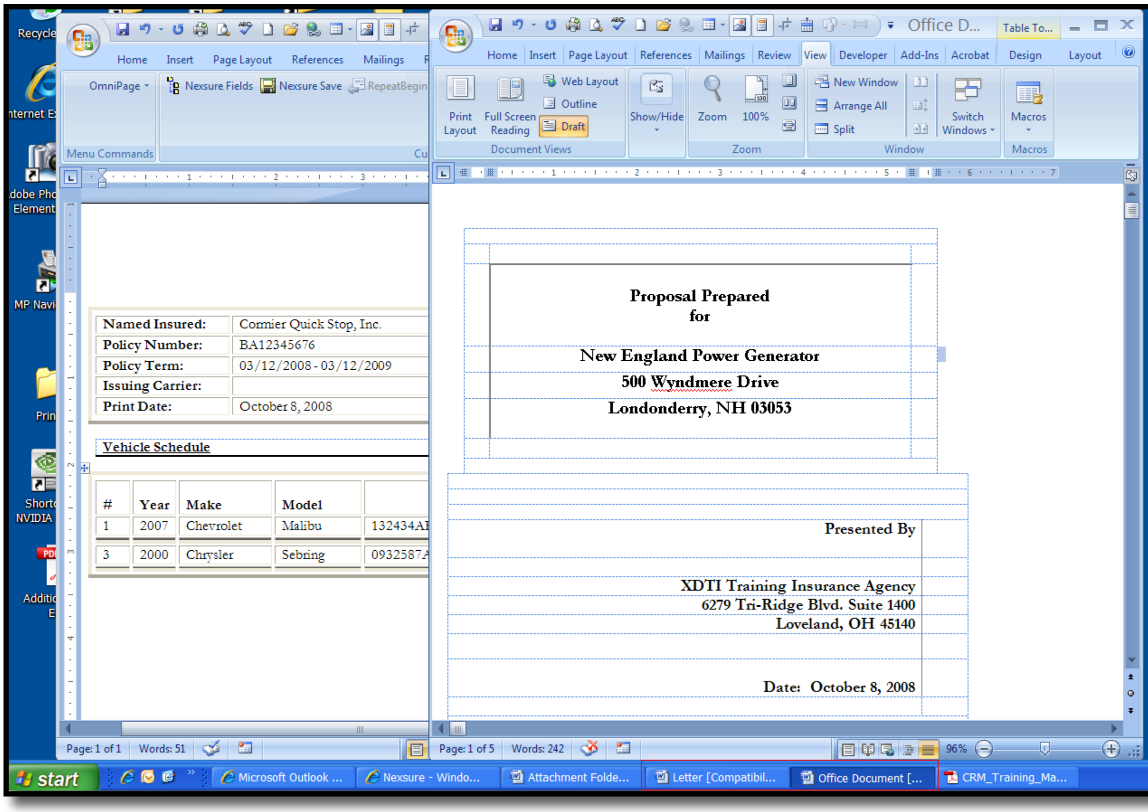
HOW to View and Update Multiple Microsoft Office Documents Simultaneously

Multiple documents may be merged, viewed and edited for the same or different clients in Nexsure at the same time. Microsoft Office documents created outside of Nexsure can be open for editing at the same time Nexsure Office Integration documents are open. The Windows Task Bar holds all open documents. This illustration displays the task bar with a Nexsure Word Office Integration document and a document maintained outside of Nexsure open simultaneously and accessible from the Windows Task Bar. Click the Task Bar button to access and complete Office documents.



In the next illustration, a document created with a Template is open for the client Cormier Quick Stop. The open Nexsure Word document is minimized to display the Nexsure client. From **Search** a second client, New England Power Generator, is accessed and a new document is created through the newly accessed client's attachments.

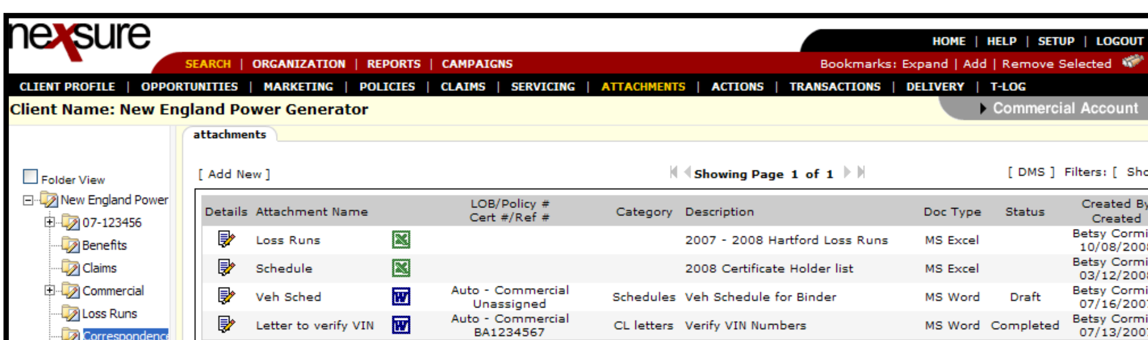
Both Office Integration (Nexsure Word Office Integration) documents are open for editing and completion. Access Cormier Quick Stop's or New England Power Generator's documents from the Windows Task Bar for editing and saving.



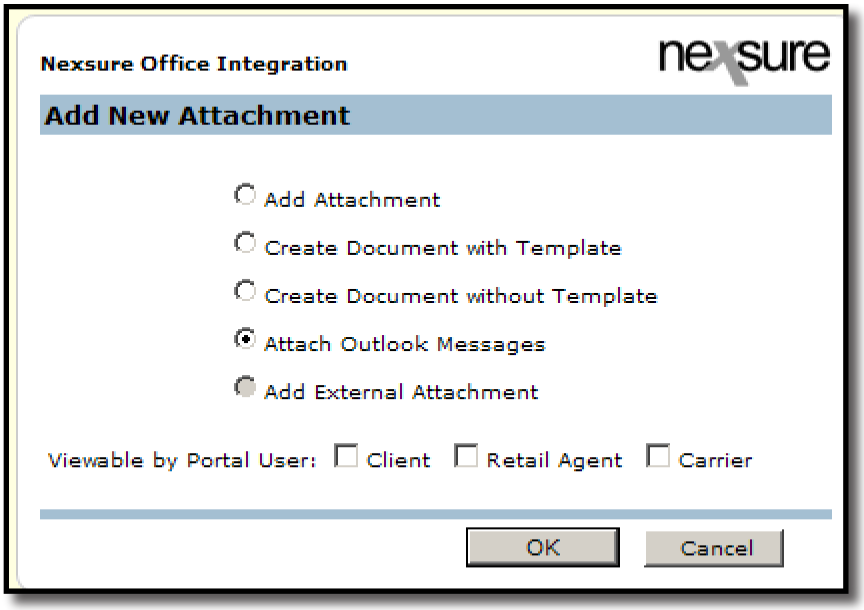
Attaching Outlook Messages

If attaching an e-mail, make sure to save its attachments separately from the e-mail especially if an attachment is a schedule to be imported to the application later.

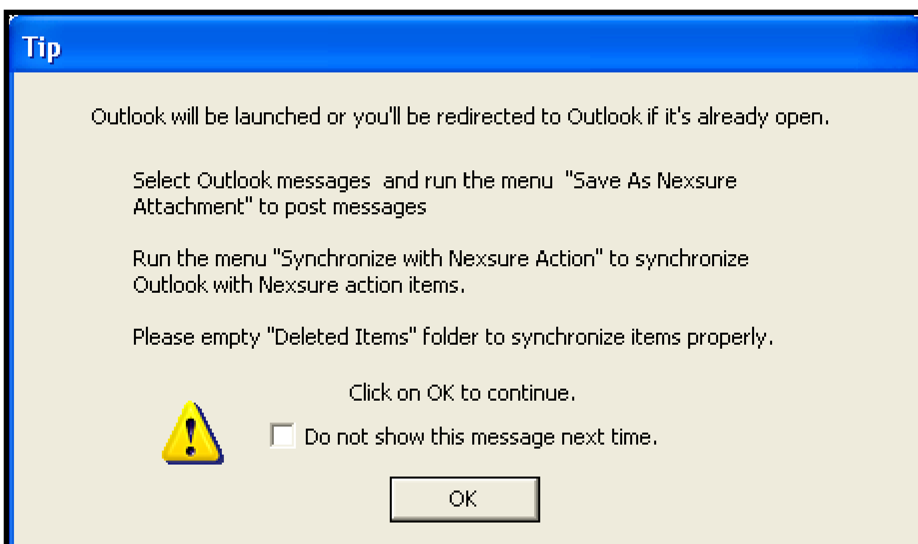
After accessing the client file, click the **ATTACHMENTS** link on the **Client** menu or **attachments** tab from underwriting level.



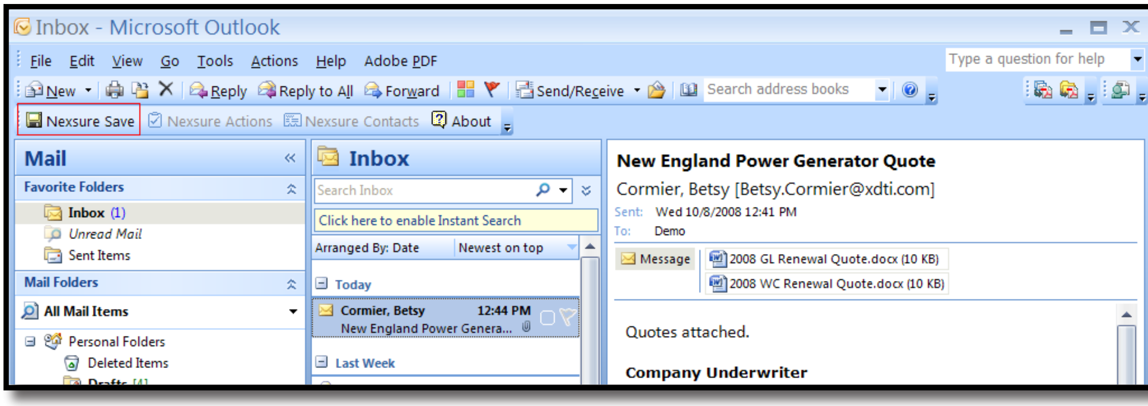
Click the **[Add New]** link to display the **Add Attachment** pop-up. Click the **Attach Outlook Messages** option and click the **Next** button to allow Nexsure access to your e-mail.



The first time you attach an Outlook message, a Tip pop-up is displayed providing the steps to complete the addition of the attachment. If this tip is not desired again, click the check box beside **Do not show this message next time**. Click **OK** to close the tip.

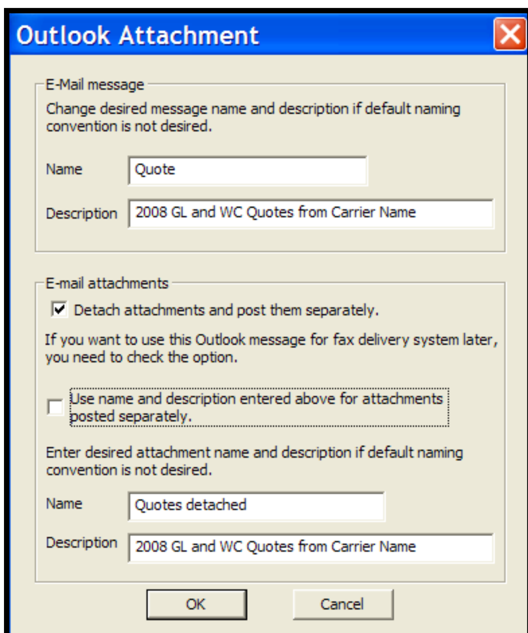


Nexsure opens Outlook if it is not already open. The Nexsure toolbar is added to Outlook with the  **Nexsure Save** button active. In Outlook, select to highlight the message to be attached.

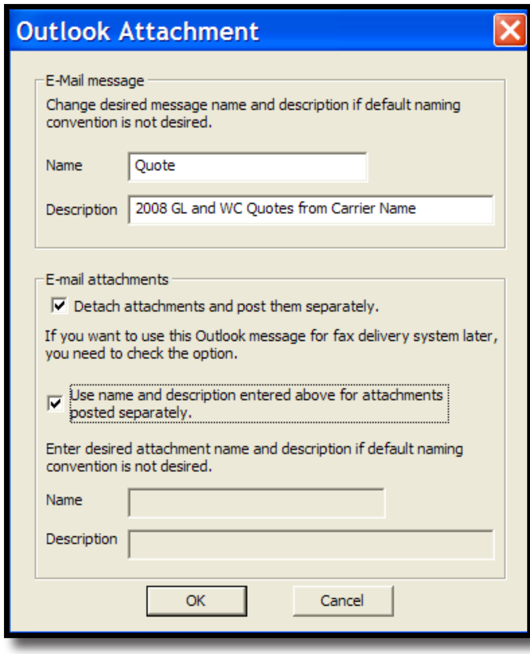


Click **Nexsure Save** from the Nexsure Toolbar in Outlook.

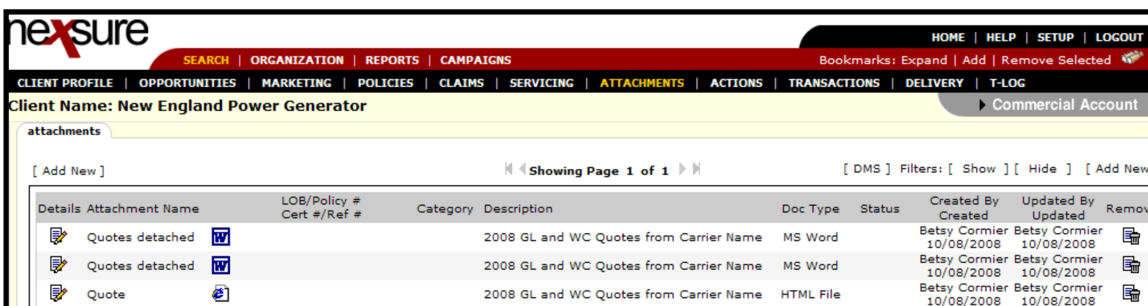
The **Outlook Attachment** dialog box displays to enter the **Name** and **Description** of the attachment in Nexsure. Nexsure prompts the sender's name in the **Name** box and the email's subject line as the **Description**. Files attached to an Outlook message may be detached and saved separately from email's message. If the **Detach attachments and post them separately** check box is not checked, the message with its attachments are saved together. If checked, the **Outlook Attachment** dialog box refreshes to display fields to enter a different **Name** and **Description** for the attachments from the message itself.



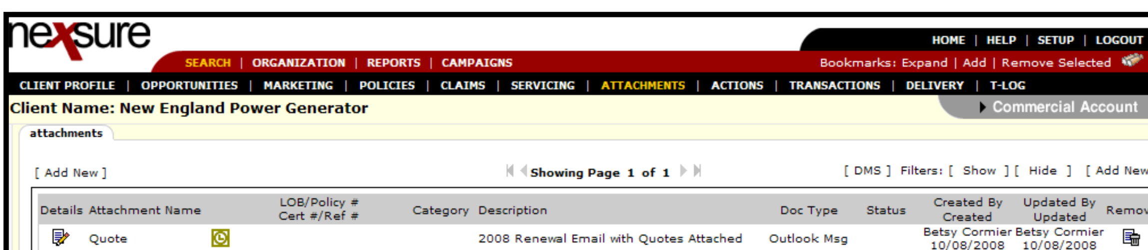
All attachments posted separately from the message will be saved to the client's **attachments** with the **Name** and **Description** entered in the optional fields. If desired, the default **Name** and **Description** may be used to save the email message and separate attachments by checking the **Use name and description entered above for attachments posted separately** check box. When checked, the optional **Name** and **Description** fields for naming attachments are unavailable for editing.



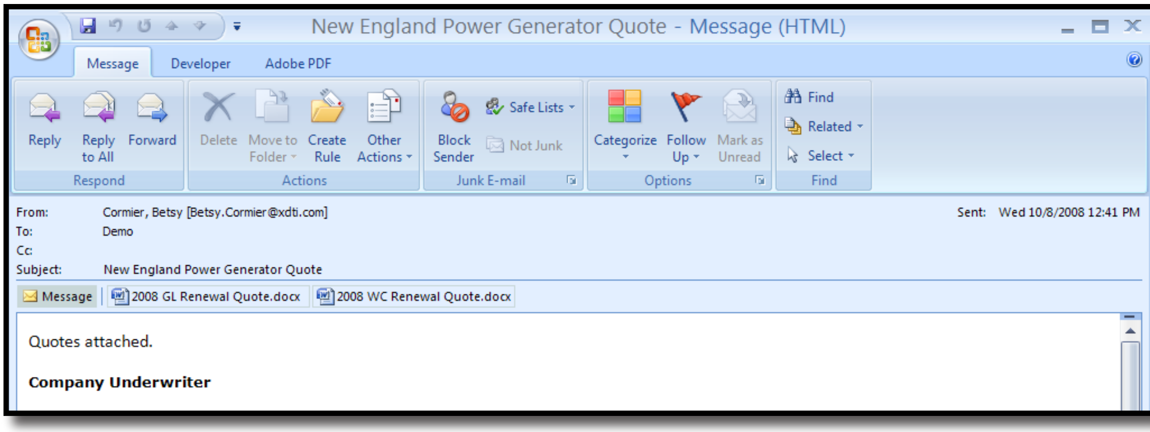
The attachments summary view displays the e-mail message and its attachments separately if they are detached and saved separately. The e-mail message is saved as a **Doc Type** html file. Change any attachment's Name and Description by clicking the icon to the right of the **Attachment Name**. Only people assigned to a restricted access policy may modify an attachment name and description if it is associated to a restricted access policy.



When the Outlook e-mail message is saved without detaching any attachments, the attachment summary view displays the e-mail message with an **Outlook** icon and a **Doc Type** of Outlook Msg.

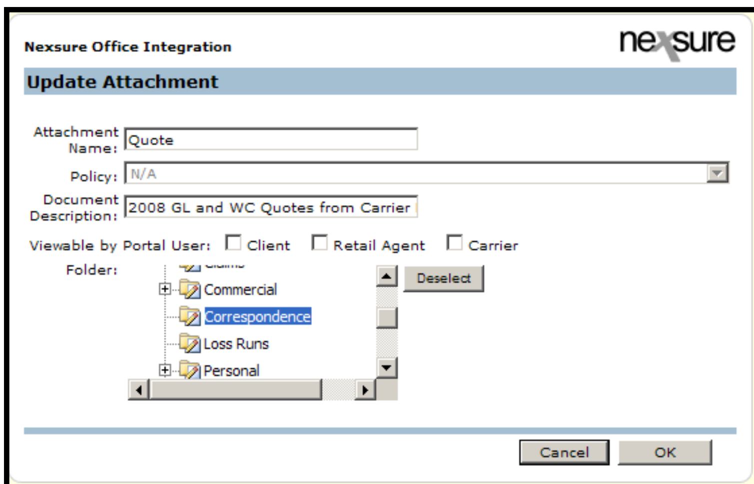


Click the **Details** icon of the Outlook Message. The e-mail message opens in Outlook.



HOW to Modify the Attached Outlook Message

- Click the icon to the right of the **Attachment Name** to modify the attachment.

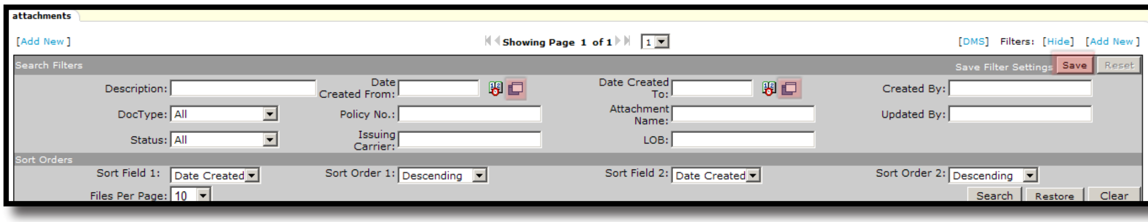


- The **Update Attachment** dialog box displays. Make changes to the **Attachment Name**, **Document Description**, Portal Access and/or **Folder** placement. The **Deselect** button is used to deselect the current **Folder** selection.
    - If an attachment is associated to a restricted access policy, the **Attachment Name** can only be modified by people that are assigned to the restricted policy.
    - Policy association cannot be changed on Outlook messages.
- Click **OK** to save the changes. Click **Cancel** to abort changes to the attachment.

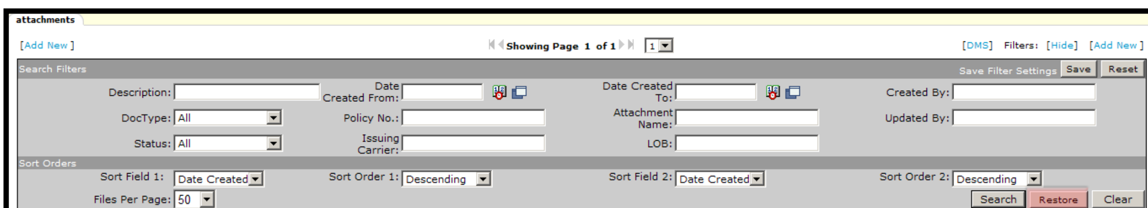
HOW to Customize Default Filter Settings for Attachments

The summary view of attachments displayed at **Client** menu > **ATTACHMENTS**, policy and certificate attachments can be customized by each user. Customizing default search filter settings is done separately at each level where attachments are viewed: **Client** menu > **ATTACHMENTS**, policy attachments and certificate attachments. The steps to save a personal default view of attachments are the same at each level.

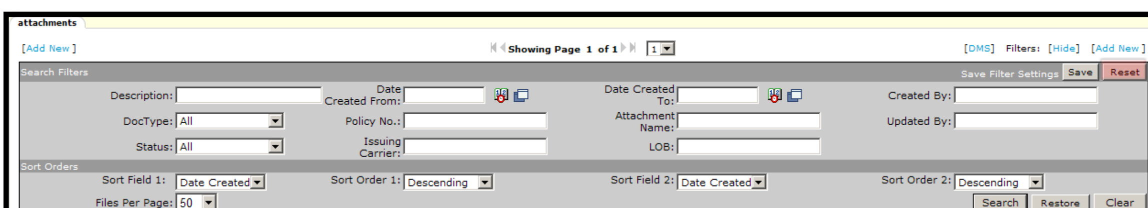
The User's currently displayed **Search** and **Sort** filter criteria may be saved as a personal default view of attachments by clicking the Filter Settings **Save** button. The next time attachments at that level is selected by the User, the items returned will be filtered by default to display attachments that meet the saved search criteria. Exercise caution when saving **Search** and **Sort** filter settings with a date range entered as returned Actions will be restricted to that date range. Use the **Date Variable** icon to enter a variable number of days to set a continuous date range as the search criteria. Enter + or – and the number of days up to three digits in the **Date Variable** pop-up to establish date criteria before (-) or after (+) the current date before clicking **Save**.



A user's saved filter settings will not be altered by subsequent searches for specific attachments. The saved settings will remain as saved and will not be altered by those future searches. Clicking the **Restore** button located between **Search** and **Clear** will return the search filter criteria to the saved personal default settings. Use the **Restore** button if you want to view attachments by the saved default settings before leaving the screen.



When search filters are saved, the **Reset** button is activated. Reset is used to restore the default filter settings to the Nexsure default at that level. Reset removes any previously saved search filter criteria. The next time attachments at that level is selected by the user, the items returned will be filtered by the Nexsure default. Search filters that display an inactive **Reset** button do not have any saved filter settings.



Filter Settings Buttons	Description
Save	**Clicking Save stores the current search criteria as the user's personal default view of attachments at that level.**
Restore	**Clicking Restore returns the search results to the saved search criteria after performing a search using different search criteria.**
Reset	**Clicking Reset restores the Nexsure Default view of attachments at that level and removes any saved search criteria.**

Notes