

Team Settings

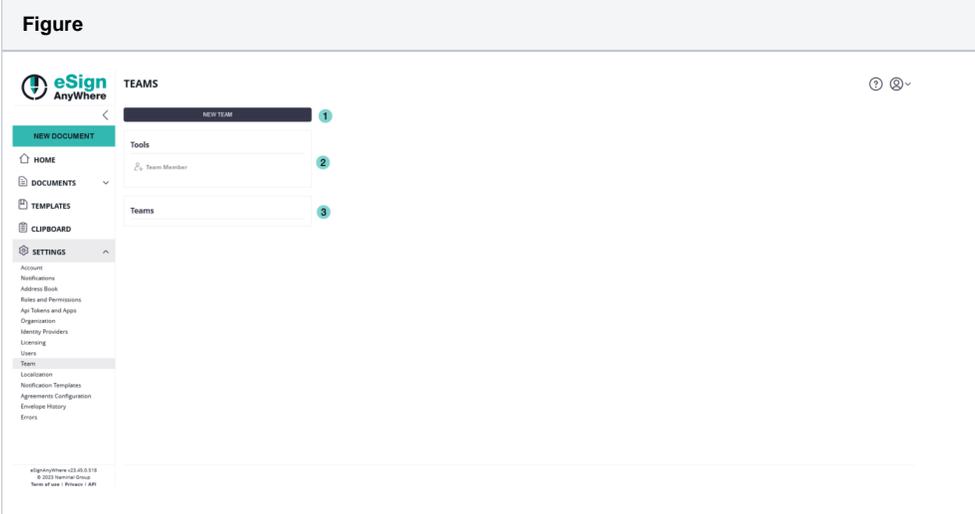
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Team Editor

In this section you are defining your teams. A team is a virtual organization, in which the team-manager (root) has access to all envelopes of the team. With the enabled sharing feature all team members can access the envelopes and/or templates of the team. People with the "isUserManager" setting can edit teams.

i If a person is in two teams (Team A & Team B) and sharing is enabled, the envelopes of Team A are not visible to Team B (and vice versa). [Note: changed behavior with eSAW 3.5, before it was able to be shared across both teams].

Overview

Figure	Description
 The screenshot shows the 'TEAMS' section of the eSign AnyWhere application. A 'NEW TEAM' form is displayed with three numbered callouts: 1 points to the 'NEW TEAM' header, 2 points to the 'Tools' section containing a 'Team Member' button, and 3 points to the 'Teams' section. A sidebar on the left contains navigation options like HOME, DOCUMENTS, TEMPLATES, and SETTINGS. The bottom of the page shows version information: 'eSignAnyWhere - 3.5.0.0.1.0 © 2021 Terminal Group Terms of Use Privacy API'.	<ol style="list-style-type: none">1. Create a new team2. Add a team member3. Available teams

Creating a Team

This chapter explains how to create teams for your organization.

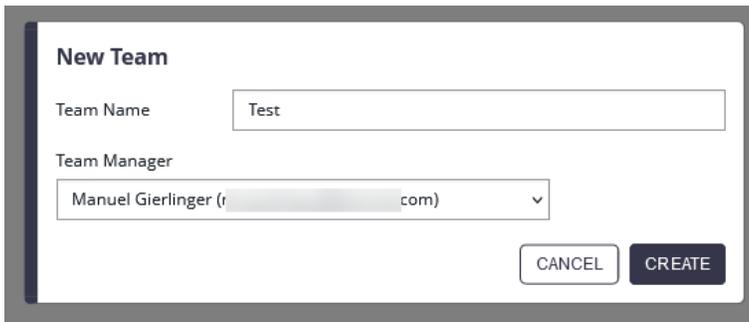
Following steps are necessary to create a team:

- Create a team record (Choose a team leader)
- Add team member to the team

i You can create more than just one team and you can also configure more level team structure. For more information please see the section **Scenarios**.

Create team record

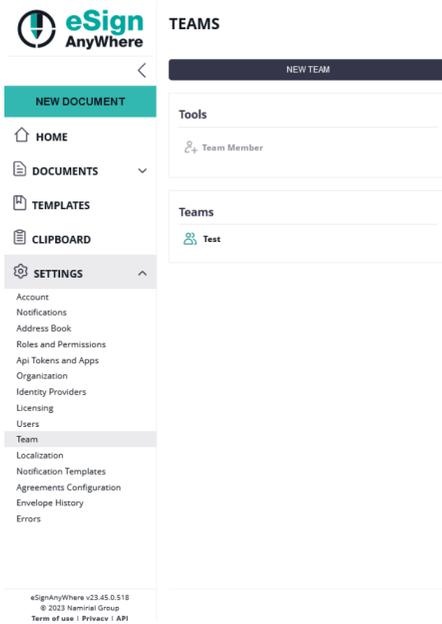
First, create a new team in your organization in Settings -> Team. Just click on the "New Team" button to add a new team to your organization. For a new team you need a team name and a team leader. See also the following figure:



The screenshot shows a 'New Team' form with the following fields and buttons:

- Team Name:** A text input field containing the value 'Test'.
- Team Manager:** A dropdown menu showing 'Manuel Gierlinger (r... com)' with a downward arrow.
- Buttons:** 'CANCEL' and 'CREATE' buttons are located at the bottom right of the form.

After creating your team you can find it in the section teams like it is shown in the next figure:



The screenshot displays the 'TEAMS' section of the eSign AnyWhere application. The left sidebar contains the following navigation items:

- NEW DOCUMENT
- HOME
- DOCUMENTS
- TEMPLATES
- CLIPBOARD
- SETTINGS (expanded)
- Account
- Notifications
- Address Book
- Roles and Permissions
- Api Tokens and Apps
- Organization
- Identity Providers
- Licensing
- Users
- Team (highlighted)
- Localization
- Notification Templates
- Agreements Configuration
- Envelope History
- Errors

The main content area shows the 'NEW TEAM' header and two sections:

- Tools:** A section with a 'Team Member' entry.
- Teams:** A section with a 'Test' entry.

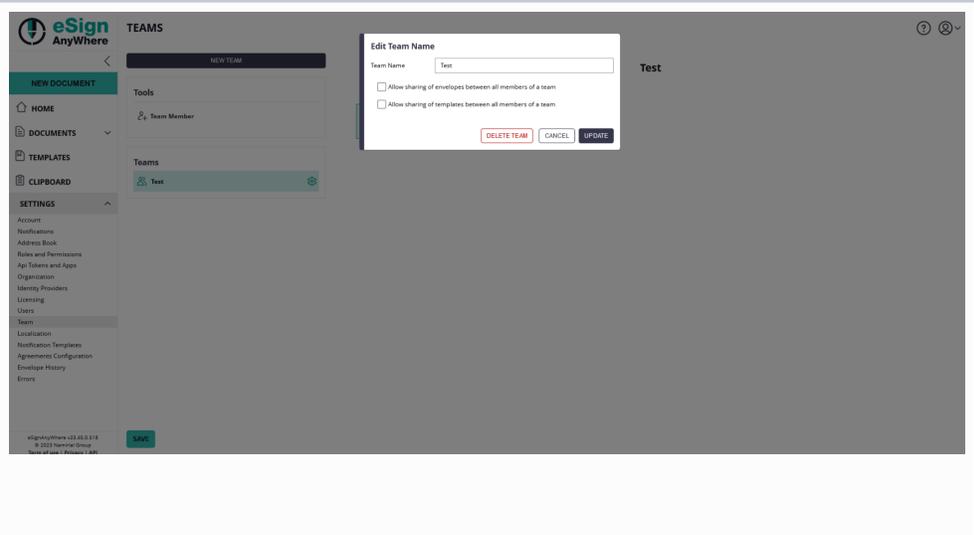
At the bottom left, the footer text reads: 'eSignAnyWhere v23.45.0.518 © 2023 Namnial Group Term of use | Privacy | API'.



i Note: For each team you can define the following settings:

- Allow sharing of envelopes between all members of a team
- Allow sharing of templates between all members of a team

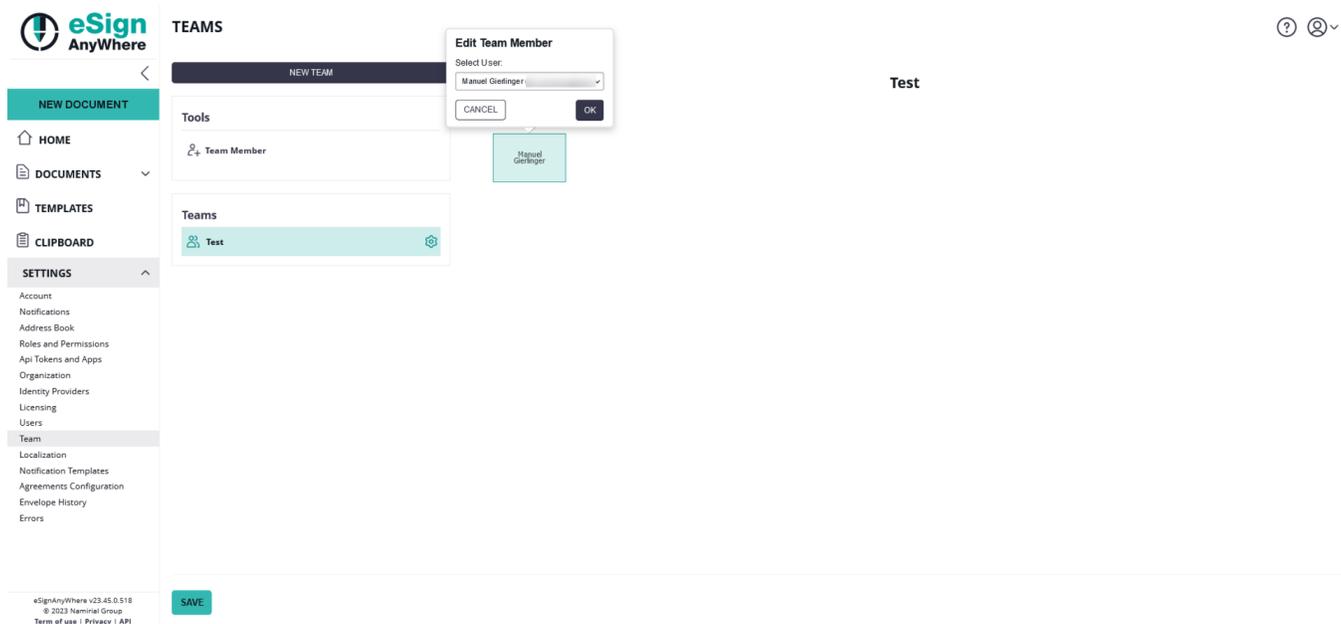
Please see the following figure, which shows you where you can find those settings:

Figure	Description
	1. Team Settings

Add team member

By drag and drop add a new member onto to your selected team. You have to select which user should be added to the team.

i Please note: The member must be dragged onto an existing member!



After adding team members to your team you can find a filter "By a team member" in the section Documents in Signed and Sent. Please see the next figure:

NEW DOCUMENT

HOME DOCUMENTS Status Sent By Me By a team member By team Signed Sender Date Bulk TEMPLATES CLIPBOARD SETTINGS

SELECT ALL REFRESH BULK SIGNING ASSISTANT EXPORT AS CSV Sort by: Recent Activity

Envelope	Status	Actions
<input type="checkbox"/>	Completed 17/11/2023 09:32	
<input type="checkbox"/>	Draft 17/11/2023 09:13	SIGN
<input type="checkbox"/>	Draft 17/11/2023 09:08	CONTINUE
<input type="checkbox"/>	Completed 17/11/2023 09:03	
<input type="checkbox"/>	Draft 17/11/2023 09:02	CONTINUE
<input type="checkbox"/>	Completed 17/11/2023 09:00	
<input type="checkbox"/>	Waiting for you 16/11/2023 08:49	SIGN
<input type="checkbox"/>	Draft 16/11/2023 07:40	CONTINUE
<input type="checkbox"/>	Waiting for you 15/11/2023 14:23	SIGN
<input type="checkbox"/>	Draft 13/11/2023 13:33	CONTINUE

1 2 3 4 5 6 7 8 9 > X

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Please also see a complete process in the following video:

Your browser does not support the HTML5 video element

Remove team member

Removing a team member is simple. Just move over it and a delete icon appears.

TEAMS

NEW DOCUMENT

HOME DOCUMENTS TEMPLATES CLIPBOARD SETTINGS

Account Notifications Address Book Roles and Permissions Api Tokens and Apps Organization Identity Providers Licensing Users Team Localization Notification Templates Agreements Configuration Envelope History Errors

NEW TEAM

Tools
Team Member

Teams
Test

Manuel Gerlinger
Team Member 5
Team Member 2

Test

SAVE

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Sharing Envelopes / Drafts / Templates within a Team

As you can see in the table below, the team leader always has access to sent and signed envelopes. If the team configuration also allows sharing templates then the team leader has also access to the templates created by the team members. If team sharing is allowed also the team members have access to other signed and sent envelopes from other team members and also the team members have access to the signed and sent envelopes created by the team leader.

	No sharing	Sharing
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	Team leader	Team member	Team leader	Team member
Envelopes	✓		✓	✓
Templates	✓		✓	✓
Bulk	✓		✓	✓
Draft				

For more information of sharing envelopes in a team please also have a look at the next chapter “**Scenarios**”.

i If a user is allowed to create/read/update/delete envelopes, the user can prevent sharing documents with team members. In this case, even if sharing is allowed according to the team settings, the individual user can choose whether his/her own document is visible to others or not when creating and also after creating an envelope.

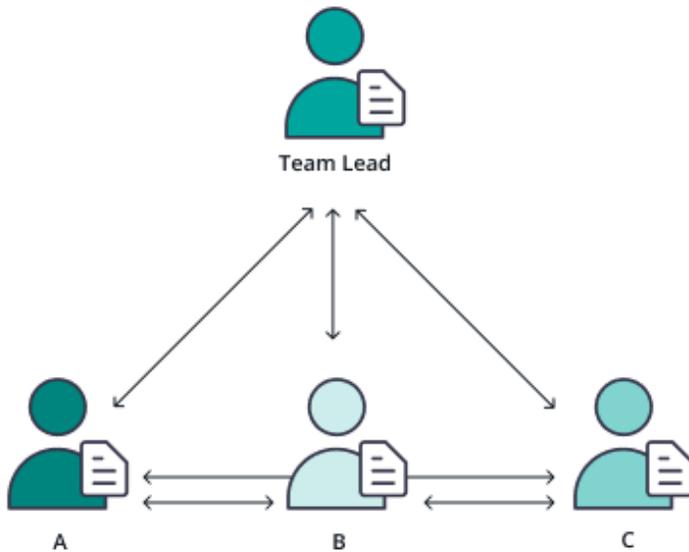
! If prevent sharing documents with team members is enabled also the team leader has no more access to the document of the team member who has enabled preventing.

Scenarios

In the section you can find different implementations of various team structures. The first descriptions show you how to create a one level team structure. Below that description you can find implementations for more level team structures and how the communication (sharing documents) work in teams with more level.

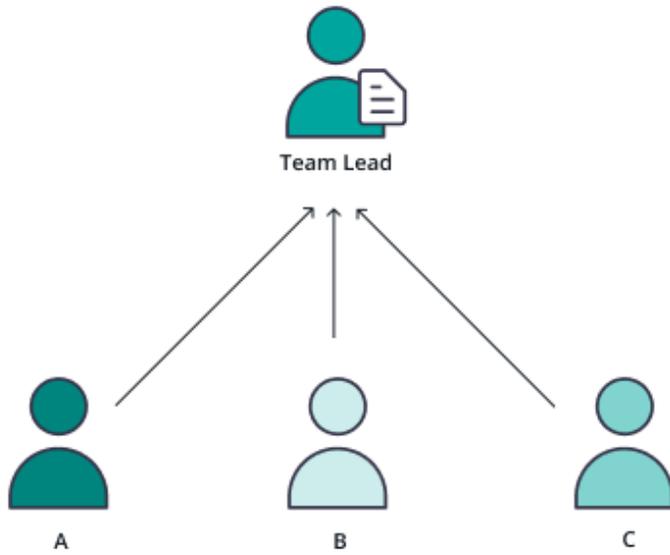
Sharing in team

In this scenario everyone has access to documents sent by others:



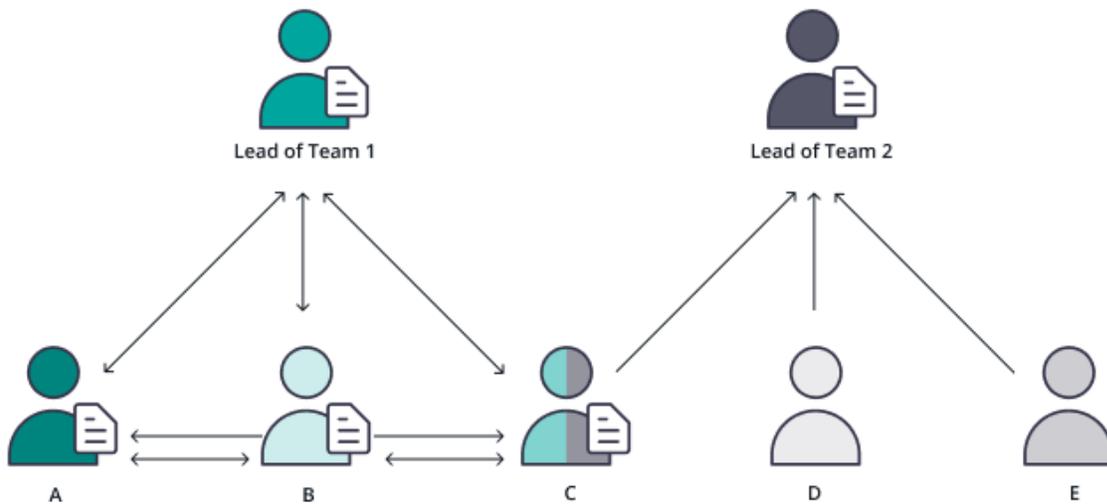
No sharing in team

In this scenario everyone has access to his/her own sent documents, except the team lead has access to sent documents of the complete team.



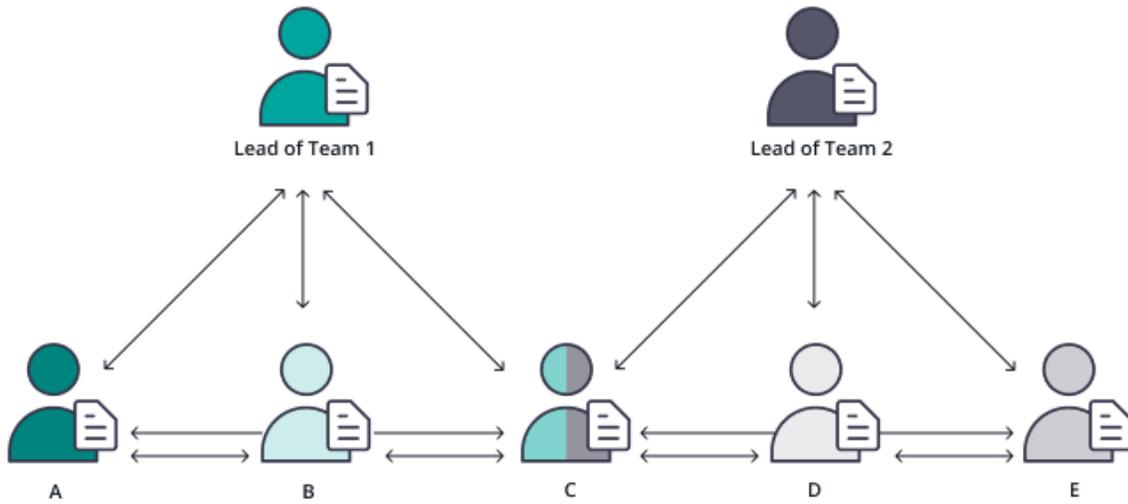
In two teams

Person C is in two teams and has two team leads. Documents of Person D cannot be seen by Person B. In that case Team 1 has sharing enabled and shares all sent documents. In Team 2 sharing is not enabled and does not share documents. Both team leaders have access to sent documents of Person C.



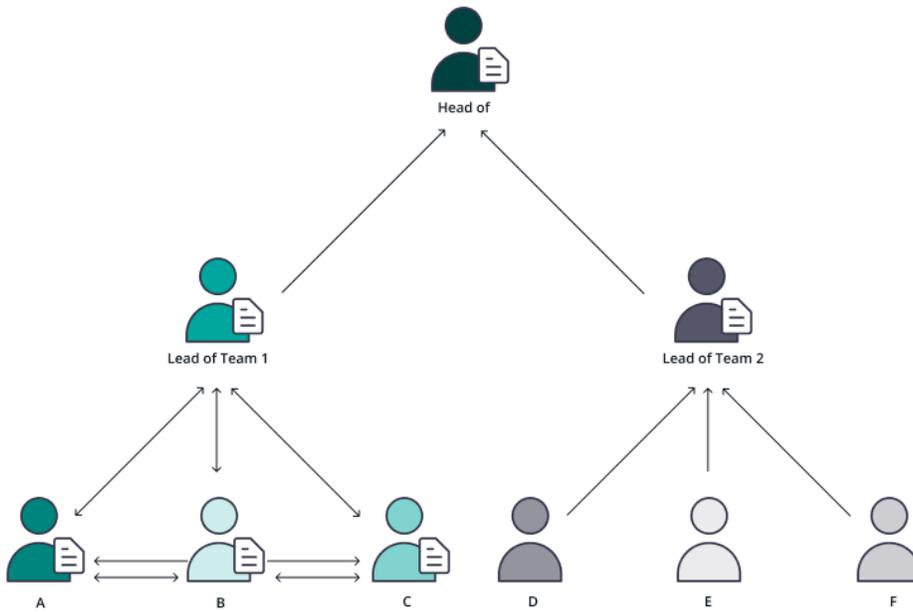
In two teams and sharing

Person C is in two teams and has two team leads. Team leaders have again full access to all documents of their team and all documents of Person C.



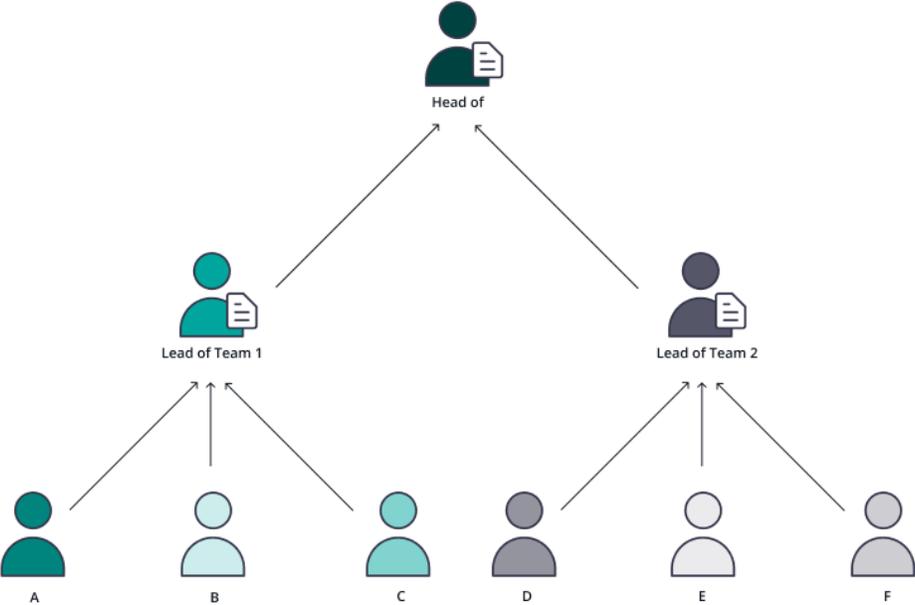
More level with split teams

In this scenario you can see that everyone in Team 1 has access to documents of the other team members A, B and C. Team 2 cannot see documents from Team 1 and also Team 2 members cannot see Team 2 members documents. Lead of Team 1 has only access to the documents from the members A, B and C. Lead of Team 2 has access to the documents of the members D, E and F. The "head of" has access to all documents.



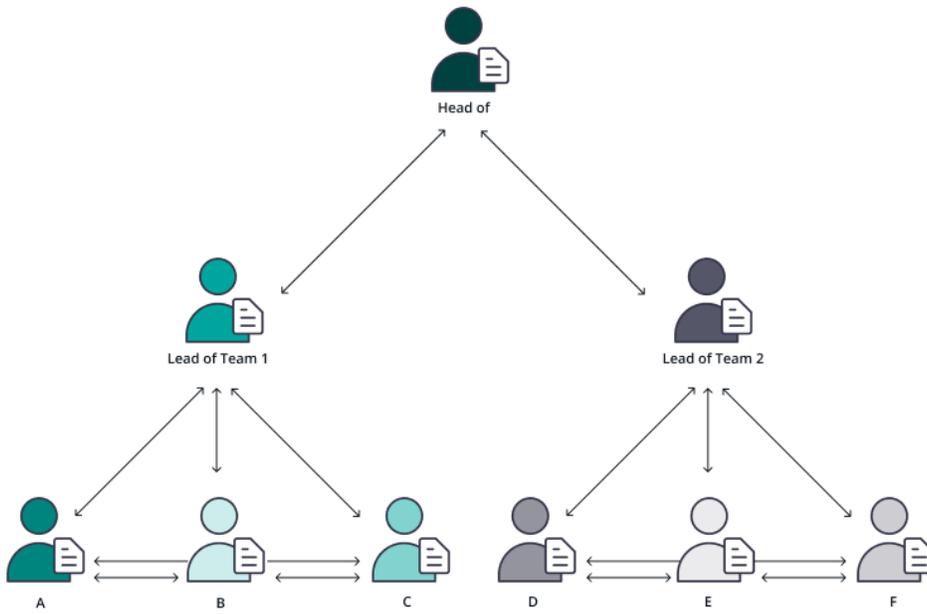
More level within one team

In this scenario only the leaders of the teams have access to the members. Therefore, lead of Team 1 has access to the documents of the members A, B and C. Lead of Team 2 has access to the documents D, E and F. The Team members do not have access to other Team members documents. The "head of" has access to all documents.



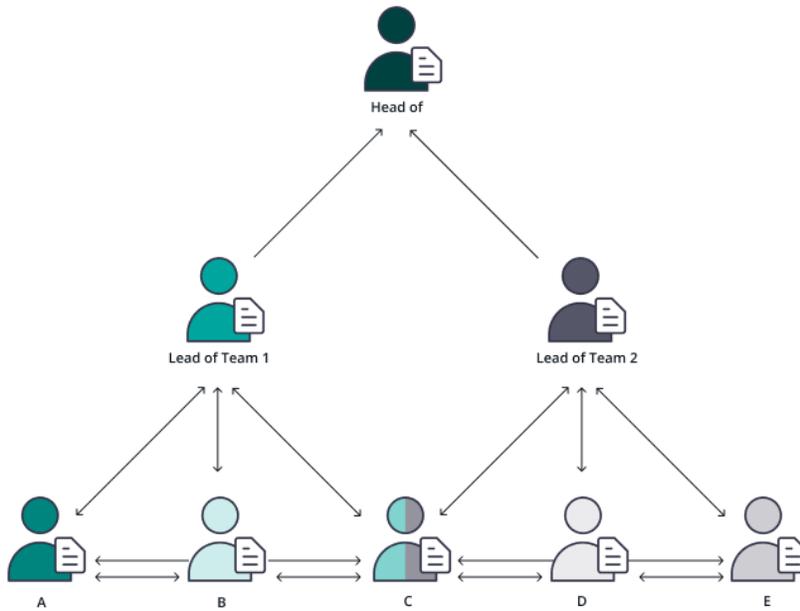
More level within one team and sharing

Everyone has access to all documents in Team 1 and everyone in Team 2 has access to documents of team members of Team 2. But, Team 2 has no access to the documents of Team 1. This applies also to the team leader.



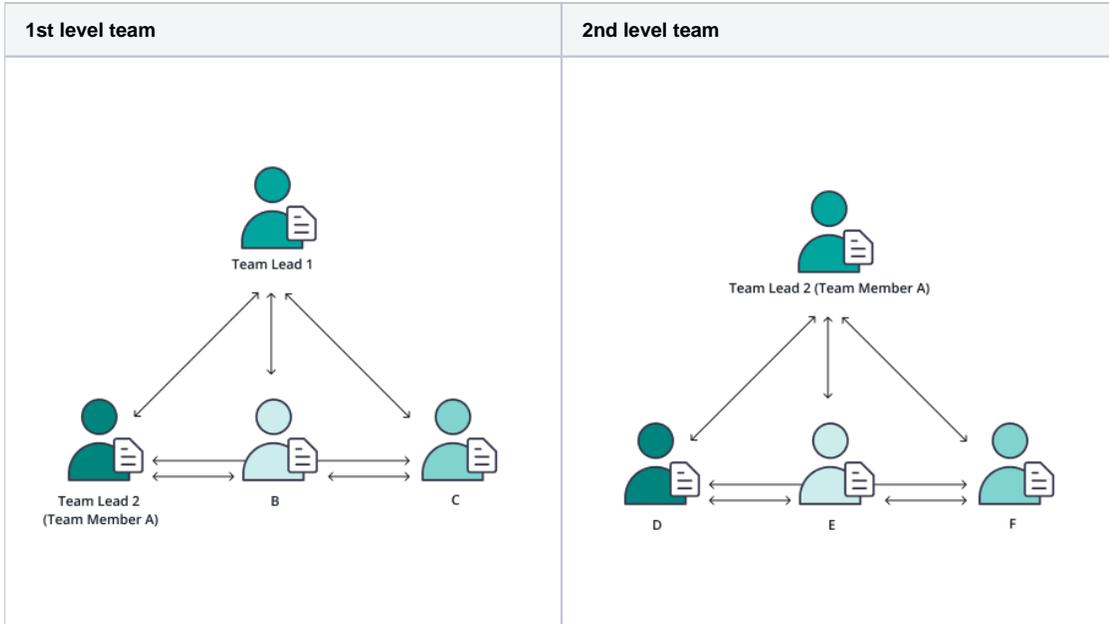
More level with sharing between teams

In this scenario person C is in both teams and therefore every team member can see the documents of other team members. For example: Person A can also see the documents of Person E although both are not in the same team. Lead of Team 1 can see the documents of his/her team members but cannot see the documents of the "head of". Same configuration for the lead of Team 2.



More level team configuration in the UI

To create a more level team structure in the UI you have to create two teams. In the top team you only have to take into account that the desired team lead of the second team is also a team member of the first team. Therefore, choose a team member in the first team who is also the team leader of a team below. Please see also the figures below:



Resulting team structure

