

The logo for Archer Summit 2025 features a stylized blue arrow pointing right, composed of two overlapping shapes, followed by the word "ARCHER" in a bold, blue, sans-serif font with a registered trademark symbol. Below "ARCHER" is the word "SUMMIT 2025" in a larger, blue, sans-serif font.

Attachment Review Feature: Preview and annotate attachments within Archer to gain efficiency, enhance collaboration, and maintain data integrity

URL: <https://83123.se.archerirm.us/default.aspx>

Username: Provided by the Presenter

Password: Provided by the Presenter

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Capabilities Overview:

The Attachment Review feature introduces a structured, permission-based approach for previewing, annotating, and commenting on attachments (PDFs and Images) within the Archer platform.

1. Attachment Preview

View PDF and image files in a new browser tab without downloading them. This enables immediate access and review within the Archer workflow.

2. Annotations and Comments

Users can annotate files using below supported methods:

- **Box Annotation and Text Highlight** for PDF files
- **Box Annotation** for image files

Each annotation must be accompanied by a comment, and annotations/comments are added as a separate layer—preserving the integrity of the original file.

3. Toggle Annotation Layer

Users may choose to show or hide all annotations and comments, giving the option to view the file in its original, unmodified form.

4. Permission-Based Access

- Users with **read** access to the attachment field can view existing annotations and comments.
- Users with **edit** access can create, edit, or delete only those annotations and comments they have authored.
- Saved annotations are immutable. Deleting either a comment or annotation will remove the pair.

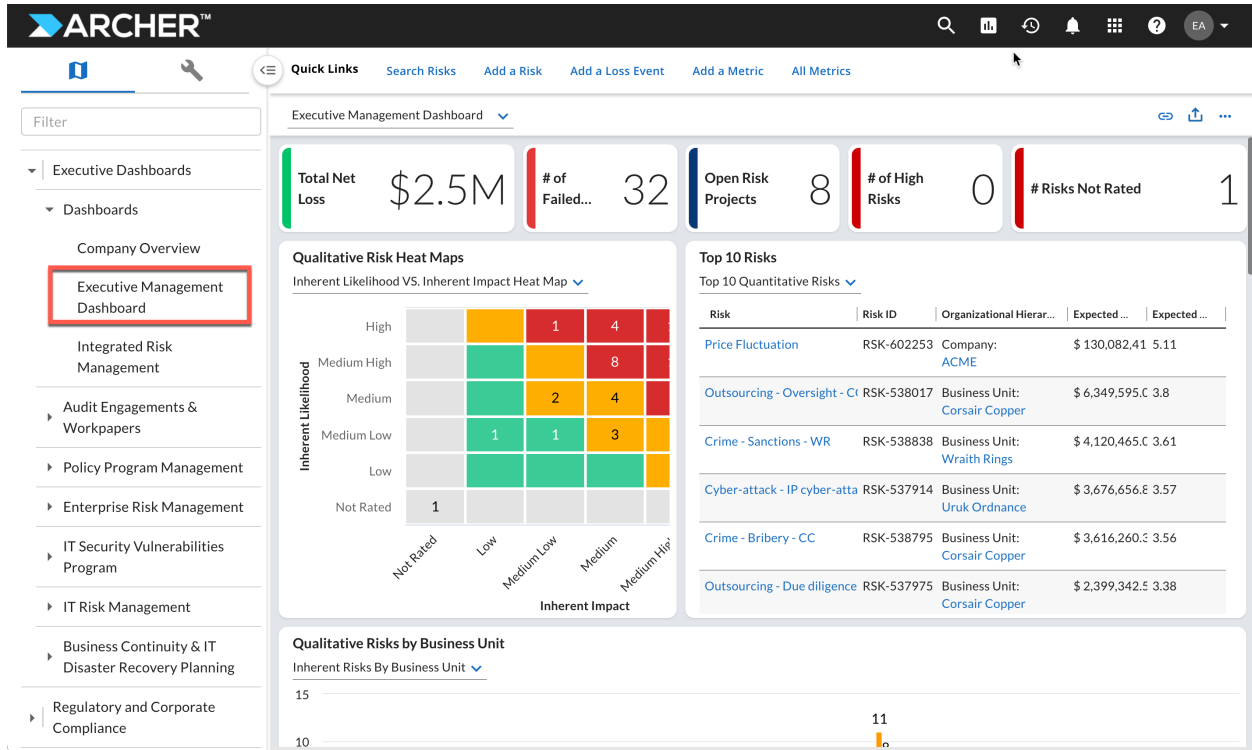
5. Download with Markups

Users may download the attachment with the annotations and comments as part of the rendered layer as a PDF. Please note that depending on the PDF viewer you are choosing to view the downloaded review files, the experience might be different.

Additional Considerations

Category	Details
Supported File Types	PDF, PNG, JPG, JPEG, WEBP
Unsupported	Encrypted/password-protected files; attachments in Subforms or Questionnaire comments
Third-party Annotation Tools	Annotations/comments added outside Archer are not supported in Attachment Review mode
Platform Scope	Feature available exclusively for SaaS customers in New Experience (NGRX) mode

Start from the Executive Management dashboard:



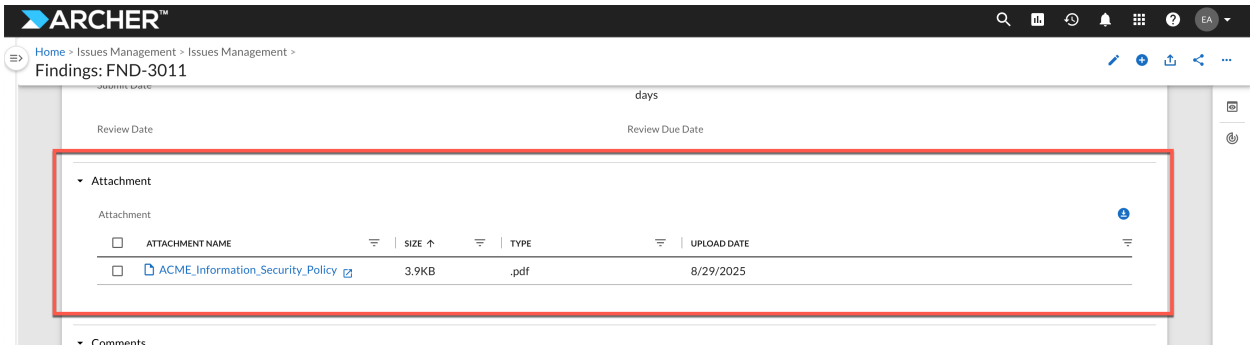
Navigate to an attachment field:

1. Scroll down on the Executive Management Dashboard to the “Recently Added Findings” report
2. Click into any Finding by clicking on the **Finding ID**


The screenshot shows the 'Recently Added Findings' report on the Archer Executive Management Dashboard. The report is displayed in a table with the following data:

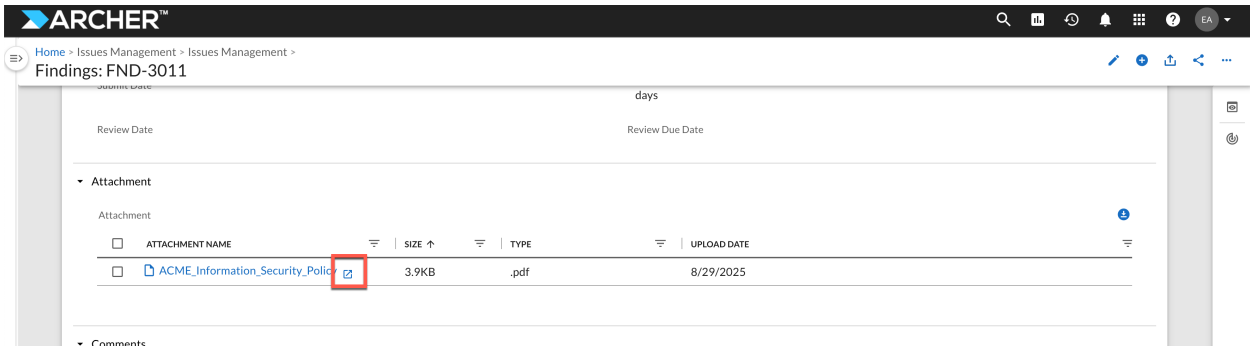
Finding ID	Name	Assigned To	First Published
FND-3011	Information Security Policy is overdue for review	Abe, Hara	8/29/2025, 3:40:49 PM

3. Scroll down to the “Attachment” section

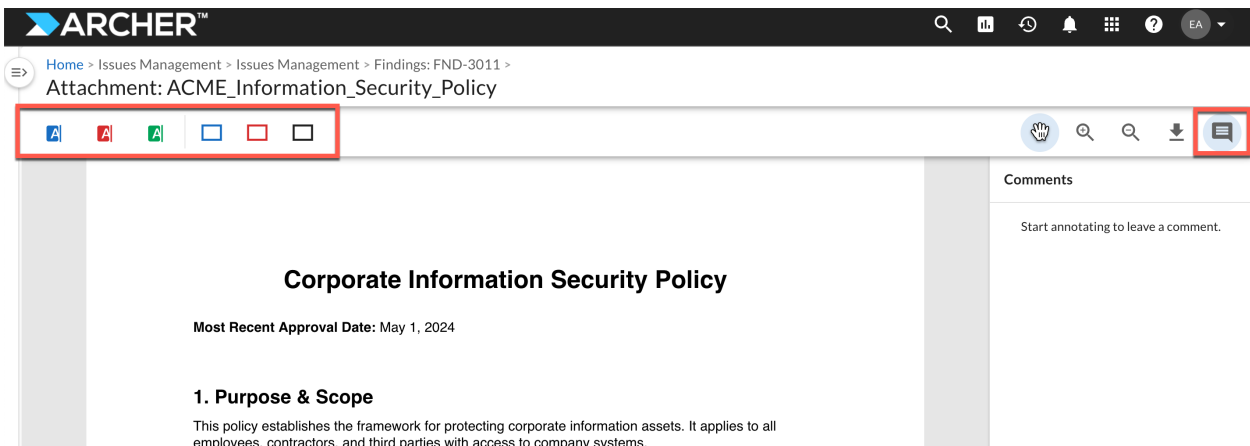


Annotate the attachment:

1. Click on the  icon to the right of the attachment name



2. To view existing comments, expand the **comments icon** in the upper-right corner of the screen.
3. To create a new comment:
 - a. In the upper-left corner of the screen, click on either a **highlight icon** or a **box icon**.



- b. Type in a comment, then click **“Comment”** to save.

The screenshot shows the Archer interface with a document viewer. The document title is "Corporate Information Security Policy". A red box highlights the text "Most Recent Approval Date: May 1, 2024". A red arrow points from this box to a comment overlay on the right side of the screen. The comment is from "Archer, Elizabeth (SE)" and says "This policy should be reviewed annually and is considered overdue." Below the comment are two buttons: "CANCEL" and "COMMENT", with the "COMMENT" button highlighted by a red box. The top navigation bar includes the Archer logo and a breadcrumb trail: "Home > Issues Management > Issues Management > Findings: FND-3011 > Attachment: ACME_Information_Security_Policy".

4. Click on existing comments to view what part of the file they pertain to.
5. Use the icons in the upper-right corner to zoom in, zoom out, and download the file (with annotations).

This screenshot is similar to the first one, showing the same document viewer. A red box highlights the toolbar in the upper-right corner, which contains icons for zooming in, zooming out, and downloading. A red arrow points from the "Most Recent Approval Date" text to the comment overlay, which is now highlighted in light blue. The comment text is "This policy should be reviewed annually and is considered overdue." The "COMMENT" button is no longer visible, suggesting it has been clicked. The breadcrumb trail and navigation bar are the same as in the first screenshot.

Lab Ends