# IMM eSign

2019.2 SP1

Admin Manager Administrator Guide



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# **Overview**

This guide provides an overview of the procedures available to users with Admin Manager privileges. Images in this guide are from Windows 10 with Internet Explorer 11. Your screens may differ with a different OS or browser.

TotaleAtlas, TotaleAtlas RTS, TeA and TeARTS are generic terms for IMM eSign. In this guide text and screen shots may use any of these terms.

# **Getting Started**

The eSign Admin Manager Administrator will define document templates for use in the IMM eSign system. As part of that process, field and party information regions will be defined.

PDF documents used for AIM definitions cannot be password protected and cannot have any security that prevents data extraction.

Before being able to use a document in IMM eSign, the administrator first needs to define a document using a document template. This involves loading your PDF document into the eSign Admin Manager, and then giving the document a unique name, defining index fields and designing additional information fields. When defining a document and document regions, you will first select an item (Document Type, Party Information, Text Field, etc.) and then use the mouse to highlight the region on the document, as indicated in the following procedures.

- 1. Planning and Indexing
- 2. Starting Admin Index Manager
- 3. Creating a Document Template
- 4. Defining FI Level Index Information
  - a. Add/Edit/Define index field, including custom index fields
    - i. Set FI-wide default values
    - ii. Set custom functions
- 5. Loading a Document
- 6. Defining a Document Type
- 7. Defining FI Level Index Field Regions
- 8. Modifying Document Level Indexing
  - a. Set document level custom functions
  - b. Set document level index field default values
- 9. Defining Text Fields
- 10. Defining Checkbox Fields
- 11. Defining Signature Fields
- 12. Defining Initial Fields
- 13. Defining Party Information
- 14. Closing a Document
- 15. Managing Attached Documents
- 16. Exporting and Importing Defined Documents

# **Planning and Indexing**

Before defining documents, you should be familiar with indexing and archiving. You should know which fields will be required for indexing, which text, checkbox and signature fields will need to be added to the documents, and you should know what party information will need to be added for Remote Signatures (Optional).

#### **Index Fields**

Index fields are used for your document indexing and archiving systems. Indexes are necessary for your imaging system to successfully archive your document.

In IMM eSign RTS, there are 2 levels of indexing.

#### FI Level Indexing

Indexing information defined and applied at the FI (Financial Institution) level applies to all documents processed through IMM eSign RTS. FI Level index fields can be edited or modified before defining a document or while a document is being defined. Custom Index Fields are created and modified at the FI Level.

#### Document Level Indexing

Some index field information for individual documents can selectively be modified separately. Document Level Indexing changes takes precedence over FI Level Indexing. Document Level index fields can only be modified during the document definition process. Custom Index Fields may be also modified at the Document Level.

#### Information Fields

Text, checkbox and signature fields are used to add additional information to completed documents. Procedures for adding these fields are included later in this guide.

#### **Party Information Fields**

Party information fields are used to transfer information from documents to eSignature, allowing documents to be viewed and signed via the web. Refer to **Defining Party Information** on page 58 for more information.

# **Starting Admin Index Manager**

### **First Time Logon**

1 Click Start > All Apps > IMM > Index Manager.

The first time eSign Admin Manager is started, the Preferences window appears and the Host System FIID will be blank.

This window also appears from within eSign Admin Manager by clicking **Edit > Preferences**. Refer to **Edit Preferences** on page 10.

Click **Edit** to unlock.

1 Verify the **Web Service URL**.

t

This is *TeSign.asmx*, not Login.asmx.

Web Service URL addresses use the .asmx extension.

The URL prefix (HTTP/HTTPS) must match the prefix selected during the server components installation.

eSign Admin Manager must be restarted if the Web Service URL is changed.

- 2 Enter the **Host System FI ID**. This is the FI ID established when the FI was created.
- 3 Enter the **Host FIID Password**. This is the FI Access Password as set by the Host Administrator during FI creation or modified under Change FI Access Password.
- 4 Click Save.

1) b Service URL:	http://YourServer/TeAASP/TeSign.asmx	
2 ostSystem FIID:	YourFIID	
3t FIID Password:	•••••	
	Edit Close	

The Preferences window can be opened again as necessary.

i

- 2 The Enter eSign Credentials window appears with the Host System FI ID populated from the previous step.
  - Host System FIID: Preset during installation.
  - Domain: Preset during installation.
  - User ID: ID of user logging into eSign Admin Manager based on the Windows login.

This user ID must be created by the FI Admin prior to this step.

- 1 **RTS Password**: This is the RTS Password which is assigned to the User ID in eSign RTS User Maintenance.
- 2 Click **OK** to continue.

🔺 Enter eSign Credentials					
Host System FIID :	YourFIID				
Domain :	YOURDOMAIN				
User ID :	YourUserID				
1 RTS Password :					
2 ОК	Cancel				

If any information on this screen is incorrect, you will be returned to the previous screen.

3

i.

This warning will appear if you are not authorized to define documents through the eSign Admin Manager.



**4** The eSign Admin Manager screen appears.



The current FI ID appears in the lower right corner of the window.

Hover the mouse pointer over the FI ID to display more information.

### **Edit Preferences**

When you are defining documents for multiple Financial Institutions, use Edit Preferences to point AIM to a different FI or server.

1 From the eSign Admin Manager screen,

Click Edit > Preferences.

In the Preferences window,

Click Edit.

- 2 Change the following options as necessary:
  - 1 Web Service URL



Web Service URL addresses use the .asmx extension.

The URL prefix (HTTP/HTTPS) must be the prefix selected during the server components installation.

- 2 Host System FIID
- 3 Host FIID Password
- 4 Zip Files Folder (Only appears if the TeSign Zip Add-On is enabled.)
- 5 Restart AIM.

1)eb Service URL:	http://YourServer/TeAASP/TeSign.asmx
2 lostSystem FIID:	YourFIID
3 st FIID Password:	******
(4) Files	
Zip Files Folder:	C:\Program Files (x86)\IMM\TotaleSign\Admin\ZipFiles
	Browse
	Edit Close

# **Creating a Document Template**



This function is not supported in Thin-Client installations.

In order to process or define a document, the document template first needs to be converted to PDF format.

A document template is a PDF document used to define Field and Party Information regions and locations within the document. If the documents that you would like to use in eSign are in any format other than PDF, you can convert your non-PDF document into a PDF document by printing it using the eSign Admin Printer, which will convert the document to PDF format.



Before creating your PDF document template, you may find it helpful to populate the field regions in the template with sample information. This will allow you to more easily select and define the regions later.

Open the document.

E	LnAppTMPLT_1apps_ID0002-a1_20170426.docx - Word Russ K ? — 🗆	×
Info	Print	<b></b>
New	Copies: 1	
Open	Print 3	
Save Save As	Printer <sup>©</sup>	
1 Print	2 MM Admin Virtual Printer	
Share	Printer Properties Printer Properties Definition Provide the Properties Definition Provide the Properties Definition Provide the Properties Definition Provide the	
Export	Settings	
Close	Pages: O O O O O O O O O O O O O O O O O O O	
Account	Print One Sided Only print on one side of th	
Feedback		
Options	Portrait Orientation ▼	
InAppTMPLT_1ap	Letter 611.92 pt x 791.9 pt	
LnAppTMPLT_1ap	Custom Margins	
• - 1089 TeA 2015.1 X	1 Page Per Sheet •	
«∰ -1163 TeA 2016.1.1	Page Setup	Ŧ

- 1 Click File > Print.
- 2 Select the eSign Admin Printer.
- 3 Click **Print**.

The document will be converted to PDF format and placed in the IMM\TotaleSign\Admin\IndexFiles folder.

Repeat as necessary to create additional PDF files.

After the PDF document has been created proceed to **Defining FI Level Index Information** on page 13 or **Loading a Document** on page 17.

# **Defining FI Level Index Information**

### Add/Edit/Define Index Fields



A total of 20 index fields (including any predefined index fields) may be defined for each FI.

From the TotaleSign Admin Index Manager screen,

#### Click Fields > View/Change Index Types.

The View/Change Index Field Types screen appears.

Vi	View / Change Index Field Types X								
	IndexFieldType	Title	MaxLength	Default for Search Active	Default for Search Completed	Use For Ima	gin External Index	Imaging Index N	ame Sn
	IMM_STDIND_DAT	IMM Date	50					Date	
	IMM_STDIND_TIMI	IMM Time	50					Time	
	IMM_STDIND_TRA	IMM Transaction	100	$\checkmark$	$\checkmark$	$\checkmark$		TransactionID	
	Full_Name	Full Name	30	$\checkmark$	$\checkmark$				
	Account_Number	Account Number	10	$\checkmark$					
	CSTM_CUSTOMEF	Customer Numbe	15	$\checkmark$					
	CSTM_TID	Tax Identification	12						
<									>
						C	elete Selected	Close	
A	dd New Index Type -								
	IndexFieldType Title MaxLength	CSTM_							
		Default for S	Gearch Active	e Default for Search	Completed Use For Im	aging			
	External Index Name								
								Add Index Type	

The fields and values on this screen are applied to <u>all documents indexed for a Financial</u> <u>Institution</u>. This can be thought of as FI-Level Indexing. *Document Level Indexing* is performed in **Modifying Document Level Indexing**.

The section highlighted in red lists both Default (Predefined) and Custom Index Fields that have been defined for your Financial Institution (FI).

The action button area (highlighted in green) contains:

- **Delete Selected**: Used to delete custom index fields only. Predefined Index Field Types cannot be deleted.
- **Close**: Closes this screen. If custom index information has been completed, or if changes are made to the field information in the upper part of the screen, the changes are saved.

The Add New Index Type part of this screen (highlighted in blue) allows defining Custom Index Fields.

T

The upper part of this screen lists *Default (Predefined)* and *Custom Index Fields* that have been defined for your Financial Institution (FI).

	ndexFieldType	Title	MaxLength	Default for Search Active	Default for Search Completed	Use For Imagin	External Index	Imaging Index Name	Smart Index Lookup	Formatted	Custom Function1	Custom Function2	Custom Function3	Custom Function4	Custom Function5
11	MM_STDIND_D/	AT IMM Date	50	✓				Date			MODIFYDATETIME				
l I	MM_STDIND_TI	MI IMM Time	50					Time			MODIFYDATETIME				
	MM_STDIND_TF	RA IMM Transaction	100	$\checkmark$				TransactionID							
	ull_Name	Full Name	30												
	Account_Number	Account Number	10	$\checkmark$											
	CSTM_CUSTOM	EF Customer Numbe	15												
•	CSTM_TID	Tax Identification	12												

The information from the Add New Index Type pane appears along with additional settings for the index type.

- 1. Index Field Type, Title and Max Length for default fields cannot be changed.
  - 2. Index Field Type for custom fields cannot be changed.
  - 3. All other field information can be modified on this screen. Click in the text box as necessary to change.
  - 4. When editing field information in the upper part of the screen, you must click out or tab out of the field before clicking Close.
- Index Field Type: Enter the Index Field Name. All custom Index Field Types must start with the prefix "CSTM\_" (including the underscore). [*Required*] Cannot be changed on this screen.
- **Title**: Enter the Title of the Index Name. (This title is also used as the Index column title or Index Search Field title in IMM eSign.) [Required]
- Max Length: A numeric length of the field. [Required]
- **Default for Search Active**: When this checkbox is checked, the index field is used, by default, as a search parameter on the Search Active Sessions screen in the IMM eSign interface. [Optional]
- **Default for Search Completed**: When this checkbox is checked, the index field is used, by default, as a search parameter on the Search Completed screen in the IMM eSign interface. [Optional]
- **Use For Imaging**: When this checkbox is checked, imaging will use the field in indexing. Only fields checked for imaging will be available for Document Level Indexing. [Optional]
- **External Index**: This is an FI Level only setting and is used to allow matching of the Index Field Type with an Index Field Name supplied in an XML file used with specific Host/Imaging system combinations. If blank, the Index Field Type name is used. [Optional]
- **Imaging Index Name**: Changes the Field Name in the generated XML, which is used by the imaging system. (Only displays for select imaging systems.)
- Smart Index Lookup: The Smart Index Lookup column determines if that index field will be used to populate other index information from the SmartIndex database. The only valid values for this are *true* or *blank* false is not used. (Only displays for select imaging systems.)
- Formatted: The Formatted column informs an external index database that TotaleAtlas data for that index field is formatted. (Checked eSign RTS data is formatted. Not checked eSign RTS data is not formatted.)
- **Custom Function (1-5)**: Custom functions may be used to modify the actual data stored in associated .XML files. You can replace characters, delete characters, change date formats, etc. Refer to the Custom Function Guide for detailed information and examples.

### **Add New Custom Index Field**

The Add New Index Type part of this screen is used to define Custom Index Fields.

- 1 **Index Field Type**: Enter the Index Field Name. All custom Index Field Types must start with the prefix "CSTM\_" (including the underscore). [*Required*]
- 2 **Title**: Enter the Title of the Index Name. (This title is also used as the Index column title or Index Search Field title in IMM eSign.) [*Required*]
- 3 Max Length: A numeric length of the field. [Required]
- 4 **Default for Search Active**: When this checkbox is checked, the index field is used, by default, as a search parameter on the Search Active Sessions screen in the IMM eSign interface. [*Optional*]
- 5 **Default for Search Completed**: When this checkbox is checked, the index field is used, by default, as a search parameter on the Search Completed screen in the IMM eSign interface. [*Optional*]
- 6 **Use for Imaging**: When this checkbox is checked, imaging will use the field in indexing. Only fields checked for imaging will be available for Document Level Indexing. [*Optional*]
- 7 External Index Name: This is an FI Level only setting and is used to allow matching of the Index Field Type with an Index Field Name supplied in an XML file used with specific Host/Imaging system combinations. If blank, the Index Field Type name is used. [Optional]

After entering the required field information,

8 Click **Add Index Type** to add the Custom Index Field to the document definition database, which will then appear in the upper part of the screen.

Add N	ew Index Type		
1	IndexFieldType:	CSTM_	
2	Title:		
3	MaxLength:	0	
	4	Default for Search Active 5 Default for Search Completed 6 Use For Imaging	
7 Exte	emal Index Name:		
		8 Add Index Type	

### **Delete Custom Index Field**



A custom field can only be deleted if it is not associated with any document.

- 1 Select a custom field.
- 2 Click Delete Selected.

View / Cł	hange Index F	ield Types							×
Index	ieldType	Title	MaxLength	Default for Search Active	Default for Search Completed	Use For Imagin	External Index	Imaging Index Nar	ne Sm
IMM_S	STDIND_DAT	IMM Date	50					Date	
IMM_S	STDIND_TIMI	IMM Time	50					Time	
IMM_S	STDIND_TRA	IMM Transaction	100	$\checkmark$	$\checkmark$	$\checkmark$		TransactionID	
Full_N	lame	Full Name	30	$\checkmark$	$\checkmark$				
1 Y	nt_Number	Account Number	10	$\checkmark$	$\checkmark$				
עי ג	CUSTOME	Customer Numbe	15	$\checkmark$	$\checkmark$	$\checkmark$			_
CSTM	_TID	Tax Identification	12			$\checkmark$			
<	Index Type	CSTM				2	te Selected	Close	>
"	idex rieid Type								
	Title								
	MaxLength	0 😫							
			arroh Active	Default for Search	Completed Use For Im	aging			
		Default for S	iedicii Aulive						

A confirmation window appears.

Click **Yes** to delete the field.

The screen updates showing the field has been deleted.

# Loading a Document

There are 2 methods of loading documents: Load Local Document and Load Document from Defined Document List. Both methods are discussed in the following procedures.



f

PDF documents used for AIM definitions cannot be password protected and cannot have any security that prevents data extraction.

### Load Local Document

Documents can be loaded from any location. The default location is C:\Program Files (x86)\IMM\TotaleSign\Admin\IndexFiles.

#### Click Start > Programs > IMM > TotaleSign > Admin > Index Manager.

The first time eSign Admin Manager is started, the Preferences window appears. Refer to **Starting Admin Index Manager** on page 7.

The FI ID appears in the lower right corner of the window. Refer to IMM eSign Admin Index Manager Screen Layout on page 20 for more information. As documents are defined, document copies are placed on the server in the SourcePDFs folder for the FI selected when defining the document.

1 From the eSign Admin Manager window,

Click File > Load Local Document.

Or

Click the Load Local Document icon 🖄.

The Select a PDF Document to Load window appears.



If you are defining several documents, copy them to the default location of *C:\Program Files (x86)\IMM\TotaleSign\Admin\IndexFiles.* 

This will prevent having to navigate to a new location to open each document.

Navigate to the PDF location.

Select a PDF.

Click Open.

ī

2 The document loads into eSign Admin Manager.



The currently opened document can be closed by clicking File > Close File. eSign Admin Manager - AppSumTMPLT\_1apps\_ID0001-e1\_201801 <u> Ejile Edit Extraction Fi</u>elds <u>P</u>arty Tools <u>V</u>iew <u>H</u>elp 🔌 💿 📄 🗔 🖙 🗠 🏑 🎭 🖳 🖸 🖸 💽 🎤 🔎 🗋 📄 🖃 ID0001-e1 Application Summary Teller Number: 9999 ndex Fields Member Number Application Number DOB Customer Name John Smith 11223344 55554 03-23-1952 SSN Loan Purpos Customer Numbe Loan Num 11223344 105 000-98-1234 Car Loan Account Number Date Started Loan Amount Member Name 123456-1 01/01/2018 23,999.00 John Smith Security Collateral Application Type □ Joint □ Fixed Party Fields Party 1 First Name John Last Name Smith Full Name John Smith Home Email johns@homeemail.com Work Email johns@workemail.com Home Phone 999-555-1234 Signature Signature Date Initials Page : 1 of 1 essfully loaded file eSign

Proceed to IMM eSign Admin Index Manager Screen Layout on page 20.

### Load Document from Defined Document List

1 From the eSign Admin Manager window,

Click File > List Defined Documents.

Or

Click the List Defined Documents icon Sec.

#### 2 The Defined Documents List window appears.

Def	ined Documents List			×				
P	lease select the Docu	ument Type(s) you would like to open	or export.				Filte	r Row
	Short Name	Full Name	Description		Display	Archive	Electronic V	Vault AIM Defined 🔶
	Contains:			⊽ Filte	er🔲	🛛 Filter 🔲	💎 Filter 🔲	⊽ Filter 🔲 🛛 🗸
	APPSUM1APPC	APPSUM1APPC	Application Summary			<b>V</b>	<b>V</b>	✓ =
	APPSUM1APPD	APPSUM1APPD	Application Summary				<ul> <li>Image: A start of the start of</li></ul>	<b>V</b>
	APPSUM2APPD	APPSUM2APPD	Application Summary		<b>~</b>		<b>v</b>	<b>V</b>
	APPSUM2APPS	APPSUM2APPS	Application Summary			<b>V</b>		<b>V</b>
	APPSUM4APPC	APPSUM4APPC	Application Summary		<b>~</b>	<b>V</b>		<b>V</b>
	APPSUM4APPD	APPSUM4APPD	Application Summary		<b>~</b>	<b>V</b>		<b>V</b>
	APPSUM6APPD	APPSUM6APPD	Application Summary		<b>~</b>	<b>V</b>	<b>V</b>	<b>V</b>
	LNADDSTATC	LNADENDUMSTATICC_1APP	Loan Addendum (Static)			<b>V</b>		· · ·
•								
Delete Selected         Open Selected         Open Selected         Open Selected         Open Selected         D           Totak 15, Selected: 1								

- Column definitions are listed under the Extraction Details window on page 24.
- The top row in each column allows filtering the selection.
  - Filters are data-specific (text or Boolean).
  - The default *text* filter selection, or constraint, is "Contains" and the default value is *empty*, which causes all rows to appear. The default *data* filter selection is "Equals", which filters based on the *icon* in the filter row.
  - Click the <u>filter icon</u> to choose a type of constraint. Click the constraint (Contains, Starts with, etc.) to enter text.

Select the document.

Click Open Selected.

The document loads into eSign Admin Manager.

All defined elements will appear in the left panel.

**3** If this message appears,

Click OK.

TeSign Error	×
Error occured while processing the request.	
ОК	

Have the IMM eSign Server Administrator perform **Imported Documents Permissions** on page 85.

### IMM eSign Admin Index Manager Screen Layout



<b>&gt;</b>	Load a local document. (File > Load Local Document)
<b>\$</b>	List defined documents. (File > List Defined Documents)
	Define a new document type. (File > New > New Document Type)
a	Define new indexes for the document. (File > New > Define New Index)
-	Add or edit text fields for the document. (Fields > Design Text Fields)
$\checkmark$	Define new Check Box fields in the document. (Fields > Design Checkbox Fields)
1	Define new signature fields in the document. (Fields > Design Signature Fields) [Disabled in Dynamic Documents]
	Define initial fields in the document. (Fields > Design Initial Fields) [Disabled in Dynamic Documents]
24	Define party fields in the document. (Party > Add Party Information) (Shift-F5) [Disabled in Dynamic Documents]
<b>F</b>	Go to Beginning/ Go to End of the document. (View > Go to > First/Last)
	Go to Previous/Next page of the document. (View > Go to > Previous/Next)
P) 🔎	Zoom Out/ Zoom In. (View > Zoom > Zoom In/Out)
	Zoom to Actual Size. (View > Zoom > Actual Size)
	Zoom to Full Height. (View > Zoom > Fit Height)
	Zoom to Full Width. (View > Zoom > Fit Width)
	View Indexes. (View > Indexes) [Document Level Indexing]



# **Defining a Document Type**

The document's unique name is used to locate and file the document.

Index fields are used in creating filenames for processed documents and document sets.

Additional fields are used to extract additional information from the document.

These procedures will discuss defining document information for new documents. Refer to **Exporting and Importing Defined Documents** on page 79 for information on modifying previously defined documents.

### Static Documents, Dynamic Documents and Image-Based Documents

What's the difference?

#### **Static Documents**

*Static documents* will always be the same length or number of pages and the layout is fixed and non-variable. All information in static documents will always be located in the same regions. The Signature Field and Signature Date Field will always be in the same locations on the same page.

### **Dynamic Documents**

*Dynamic documents* can vary in the number of pages included. Mortgage documents can be one page in some cases and nine or more in other cases. may sometimes be 1 page long or 9 pages or more in other cases. Typically, these documents require that an applicant read the information and then sign the documents at the end, attesting that the applicant has read the required information. In dynamic documents the Signature Field and Signature Date field can always be anywhere in the document regardless of the number of pages included. Document or template information should still be in a fixed location for eSign to extract the data.

Dynamic documents do not allow adding party information, initials fields or signature fields when a document is defined.

#### **Image-Based Documents**

Image-based documents are a special type of PDF document that consists entirely of an image. There is no text and there are no characters—no character data for extraction with eSign. The areas to be defined (index and party information) must contain graphic information, such as graphical representations of characters, and the OCR (Optical Character Reader) capability of eSign will extract information from defined graphic areas.



Changing document type (static, dynamic or image-based) after the document has been defined is not supported. If you need to change the document type, refer to **Deleting a Document Definition** on page 68.

# **Defining the Document Type**

**1** Click the **New Document Type icon** (File > New > New Document Type) (Shift-F3).

•		Applicati	on Summary	ID0001-e1 Teller Number: 9999
Index Fields				
Customer Name	Member	Number	Application Number	DOB
John Smith	11223344		55554	03-23-1952
Customer Number	Loan Nu	mber	SSN	Loan Purpose
11223344	105		000-98-1234	Car Loan
Member Name	Account	Account Number Date Started		Loan Amount
John Smith			01/01/2018	23,999.00
 Security Collateral		Application Type		
 Car, House, Watch		□ Individual □ Variable	□ Joint □ Fixed	
Party Fields		Party 1		
First Name	st Name John st Name Smith II Name John Smith II Name John Smith			
Last Name				
Full Name				
Home Email		johns@homeen	nail.com	
Work Email		johns@workemail.com		
Home Phone Signature		999-555-1234		
Signature Date				
Initials				

**2** The mouse cursor changes.

Click and drag the mouse over the region of the document that contains <u>text</u> <u>information unique to that document</u>. In this case the title is Application Summary, but we have used a *unique form number* for the document.

Set Latraction Fields E	arty Tools yiew Help	D 🏓	P 🗅 🗅 1	y e		
			Applicati	on Summary		Teller Number 999
	Index Fields					
	Customer Name	DOB		Date Started		Loan Purpose
	John Smith	03-23-1	952	11-22-2017		Car Loan
	Customer Number	Loan N	umber	SSN		Loan Amount
	11223344	105		000.98-1234		21,950.00
	Account Number					
	123456-1	- 32				
	Security Collateral		Application Ty	pe		
	Car, House, Watch		🗆 Individual 🗆 Variable	<ul> <li>Joint</li> <li>Fixed</li> </ul>		
	Party Fields		Party 1		Party 2	
	First Name		John		Jane	
	Last Name		Smith		Smith	
	Full Name		John Smith		Jane Sm	àth
	Home Email		johns@homeen	nail.com	janes@h	omeemail.com
	Work Email		johns@workem	ail.com	janes@v	vorkemail.com
	Home Phone		999-555-1234		999-555	-1235
	Signature					
	Signature Date					
	Initiale					

**Note:** If the text you are highlighting is very close to other text on the page, use the Zoom In function so you can more accurately highlight only the text you need.



Right-click the mouse button or press the Escape key to reset the selected region.

Click the mouse again when you complete highlighting the region on the document.

**3** The Extraction Details window appears.

APPSUM1APPF
APPSUM1APPF
Application Summary
Display Document While Processing Dynamic Document
Archive Document
Inly for Image-Based Documents)

Any and all highlighted text will appear in the Selection Text field on the Extraction Details window. Complete the form as necessary.

• Short Name: Used in creating the filename for saved sessions. The Short Name is used for the Document Set Name on the Saved Session Details screen. (20 characters maximum)



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Short Name and Full Name can only have A-Z, 1-9 and Underscore (\_). Spaces are not allowed.

- **Full Name**: Used in creating the filename for archived documents. The *Full Name* is *used in indexing* and defaults to the current filename, but can be modified at this point. (100 characters maximum)
- **Description**: Used on the Saved Session Details screen for the *Document Description* column. An easy to recognize description of the document. (150 characters maximum)
- **Display Document While Processing**: When checked and documents are processed, the documents will appear during processing by *default*. When not checked the document may still be *optionally* used while processing.
- **Dynamic Document**: When checked, the document will contain *dynamic fields* fields that may appear in different locations in a document.
  - 1. Changing document type (dynamic vs. static) after the document has been defined is not supported.
    - 2. Party information, signature fields, signature date fields and initial fields cannot be used in Dynamic Documents.
- Archive Document: When checked, the document will *always* be archived when a session is complete. When not checked, the document may still be optionally archived.

- Electronic Vault Document: Checked documents are sent to an Electronic Vault for auditing and tracking of the original document. When Electronic Vault documents are included in a session, all documents in the session will be sent to Electronic Vault for auditing and tracking.
  - The Electronic Vault helps ensure electronic documents remain legally admissible and enforceable. The Electronic Vault permanently binds electronic signatures to a document, creating a tamper-proof audit trail.
- **Perform OCR (Only for Image-Based Documents)**: When checked, the document is processed as an image-based document. To function correctly, there can be no text within the document. Index and party information areas are defined in the same manner as static documents, but they must contain graphic information, such as graphical representations of characters. A Dynamic Document cannot be defined as an image-based document.



A Dynamic Document cannot be defined as an image-based document.

The areas to be defined (index and party information) must contain graphic information, such as graphical representations of characters—areas to be defined cannot be empty.

During extraction, image-characters under the border of the defined area will not be extracted; they may incorrectly display as other characters.

• Selection Text: Any and all highlighted text from the previous step will appear in the Selection Text region.

**Note:** The Selection Text area displays the currently selected text. If your selection region has picked up extra characters, click Cancel and redefine the region.

Click Save.

- 4 When Save is clicked,
  - 1. An entry is made in the document definition table stored on the server.
  - 2. A copy of the file is moved to the server SourcePDF folder for the FI selected during the definition.
  - 3. The title of the copied source file on the server is the same as the Full Name in the Extraction Details screen.

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5 If you are defining a document that has an associated .XML file,

The Added screen appears.

Click OK to continue.

This screen only appears when the Document Type is initially defined.

Warning		×
	Document Indexes have been changed as defined in the Index XML	
	ОК	

6 The eSign Admin Manager screen refreshes.

JM1APPE					
ids ty Information			Applicati	on Summary	Teller Number 9999
	Index Fields				
	Customer Name	Member I	Number	Application Number	DOB
	John Smith	11223344		55554	03-23-1952
	Customer Number	Loan Number 105 Account Number 123456-1		SSN	Loan Purpose Car Loan Loan Amount 23,999.00
	11223344			000-98-1234	
	Member Name			Date Started	
	John Smith			01/01/2018	
	Security Collateral		Application Ty	pe	
	Car, House, Watzh		C Individual C Variable	□ Joint □ Fixed	
	Party Fields		Party 1		
	First Name		John		
	Last Name		Smith		
	Full Name		John Smith		
	Home Email		johns@homeer	nail.com	
	Work Email		johns@worken	ail.com	
	Home Phone		999-555-1234		
	Signature				
	Signature Date				

The *Short Name* appears and the document name region is highlighted in the document.

# **Defining FI Level Index Field Regions**

### **Define Index Type**

Indexes are necessary for your imaging system to successfully archive your document. First highlight the region, then select the Index. In this example we will define the Customer Name index field region.

All defined documents must have at least 1 index field (Customer\_Name, Customer\_Number, etc.) before the document can be closed.

1 Click the Define New Index icon (File > New > Define New Index) (Shift-F4).

UMIAPPE					
ocument Index a elda afy Information			Applicatio	on Summary	(1000)-e1 Teller Number: 9999
	Index Fields				
	Customer Name	Member Nu	umber	Application Number	DOB
	John Smith	11223344 Loan Number 105		55554	03-23-1952 Loan Purpose Car Loan
	Customer Number			SSN	
	11223344			000-98-1234	
	Member Name	Account No	umber	Date Started	Loan Amount
	John Smith	123456-1		01/01/2018	23,999.00
	Security Collateral	A	pplication Typ	He l	
	Gar, House, Waters	0	2 Individual 2 Variable	Joint     Fixed	
	Party Fields	P	arty 1		
	First Name	J	John		
	Last Name	Smith	imith		
	Full Name	د	John Smith johns@homeemail.com johns@workemail.com 999-555-1234		
	Home Email	je je			
	Work Email	je			
	Home Phone	9			
	Signature				
	Signature Date				

#### **2** The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the information you are indexing.

UNIAPPE icument indexes ids	2 2 8 🖬 🖬	. 🤊 🤊	9 (2) (B) (	ЯØ	
rty Information		/	Applicati	on Summary	Teller Number: 9999
	Index Fields				
	Customer Name	Member I	lumber	Application Number	DOB
	John Smith	11223344		55554	03-23-1952
	Customer Number	Loan Nur	nber	SSN	Loan Purpose
	11223344	105		000-98-1234	Car Loan
	Member Name	Account	count Number Date Started	Date Started	Loan Amount
	John Smith	123456-1		01/01/2018	23,999.00
	Security Collateral		Application Ty	pe	
	Gar, House, Watch		CI Individual CI Variable	□ Joint □ Fixed	
	Party Fields		Party 1		
	First Name		John		
	Last Name	Smith			
	Full Name		John Smith	email.com	
	Home Email		johns@homeen		
	Work Email		johns@workem	ail.com	
	Home Phone		999-555-1234		
	Signature				
	Signature Date				
	t-Iti-t-				

Click the mouse again when you complete highlighting the region on the document.

**Note**: Remember to allow extra room as necessary for future document processing. In this template the entire Name region has been highlighted.

- **3** The Extraction Details screen appears.
  - 1 Index Type: Select the Index Type from the dropdown list.

In a new document, Customer\_Name will be selected first by default.

- 2 **Define New**: The Define New *button* is used to create a new index field. Refer to Add/Edit/Define Index Fields on page 13 for more information.
- 3 Click Save.

Extraction Details	×
Please select the index type you are defining.	
Index Information	
1 Index Type: Customer Name  V 2 Define New	
Selection Text :	
John Smith	
3 Save Cancel	

**4** The eSign Admin Manager screen refreshes.

The Index Type appears and the defined region is highlighted in the document.

NIAPPE					
Customer_Name ds ty information			Applicati	on Summary	(00003-e) Teller Number: 999
	Index Fields				
	Customer Name	Member N	lumber	Application Number	DOB
	John Smith	11223344		55554	03-23-1952
	Customer Number	Loan Num	nber	SSN	Loan Purpose
	11223344	105		000-98-1234	Car Loan
	Member Name	Account	Number	Date Started	Loan Amount
	John Smith	123456-1	-1 01/01/2018		23,999.00
	Security Collateral		Application Ty	pe	
	Car, House, Water		CI Individual CI Variable	Joint     Fixed	
	Party Fields		Party 1		
	First Name		John		
	Last Name		Smith		
	Full Name		John Smith		
	Home Email		johns@homeen	nail.com	
	Work Email		johns@workem	ail.com	
	Home Phone		999-555-1234		
	Signature				
	Signature Date				

Repeat these steps as many times as necessary to define the index field type regions within each document.

### **Reorder Index Type List**

1 When there are several index fields defined, you can change the order in which they are listed.



Reordering the list has no effect on the actual Index.

Select the Index field to be moved.

Right-click on the field and select Move Up/Down or Click **Extraction > Ordering > Move Up/Down** to change the order.

ITAPPE ment indexes ustomer Name					
Automer_Namber Aenber_Name Automer_DOB			Application	n Summary	iD0001-e1 Teller Number: 999
colo El Dejete	index Fields				1.1
SN Move Up	Customer Name	Member N	umber	Application Number	DOB
STM Move Down	John Smith	11223344		55554	03-23-1952
CSTM_DOWN OF USE CSTM_DOWNAMOUNT ds ty information	Customer Number	Loan Number 105 Account Number 123456-1		SSN	Loan Purpose Car Loan
	11223344			000-98-1234	
	Member Name			Date Started	Loan Amount
	John Smith			01/01/2018	23,999.00
	Security Collateral	1	Application Type		
	Car, House, Watch		⊐ lisdividual 3 Variable	Joint     Fixed	
	Party Fields	1	Party 1		
	First Name		John		
	Last Name	1	Smith		
	Full Name		John Smith		
	Home Email	i	johns@homeemail.com		
	Work Email	j	johns@workemail.com		
	Home Phone	1	99-555-1234		
	Signature				
	Signature Date				
	In Marke				

# **Delete Index Type**

**1** This delete function deletes a defined region from the current document; it does not delete the field from the database.

Right-click on the Index Type in the list.

Select Delete from the popup menu.

e Edit Extraction Fields Par	ty Taols <u>V</u> iew <u>H</u> elp			
Document Indexes     Customer, Name     Customer, Name     Customer, Name     Customer, Name     Customer, DOB     Memo     Loop     Edit		Аррі	cation Summary	iD0001+e1 Tallar Number 9999
Accou Dejete	Index Fields			
- SSN Move Up - IMMU - CSTM Set Move Down - CSTM Commonwerse	Customer Name	Member Number	Application Number	DOB
	John Smith	(11223344	55554	03-23-1952
	Customer Number	Loan Number	SSN	Loan Purpose
- Fields	11223344	105	000-98-1234	Car Loan
- Party Information	Member Name	Account Number	Date Started	Loan Amount
	John Smith	123456-1	01/01/2018	23,999.00
	Security Collateral	Applicati	on Type	
	Car, House, Watch	CI Individ CI Variabi	□ Joint □ Fixed	
	Party Fields	Party 1		
	First Name	John		
	Last Name	Smith		
	Full Name	John Smi	th	
	Home Email	johns@h	omeemail.com	
	Work Email	johns@w	orkemail.com	
	Home Phone	999-555-	1234	
	Signature			
	Signature Date			
	Initials			

Click **Yes** in the Confirm Delete popup window.

### **Change Index Type**

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- 1 There are 2 methods to change the index type: Recreate or Edit Extraction Details
  - 1. **Recreate** the index
    - a. Delete the Index Type (Delete Index Type on page 31).
    - b. Redefine a new region (Define Index Type on page 27).

#### 2. Edit Extraction Details

- a. Select the Index Type to be changed. Right-click and select Edit or click **Extraction > Edit Extraction**.
- b. The Extraction Details screen appears.

Extraction Details	
Please select the index type you are defining.	
Index Information	-
Index Type: Customer_DOB  V Define New	
Selection Text :	
03-23-1952	
Save Cancel	

- c. Click the down arrow in the Index Type selection box.
- d. Select a different Index Type.
- e. Click Save.

From this screen you can also create a new Index Type.

Click Define New.

Refer to Add/Edit/Define Index Fields on page 13 for more information.

# **Modifying Document Level Indexing**

- 1 Click the View Indexes icon (View > View Indexes).
- 2 The Document Imaging Indexes screen appears.

Only fields which have been marked as "Use for Imaging" in the View/Change Index Field Types screen are available on the Document Imaging Indexes screen.

Additionally, if your system uses .XML files with field definitions, those defined fields will appear here.

Areas in red will vary according to the Imaging System selected by the Administrator.

Document Imagin	g Indexes - Af	PSUM1APPD.pd	df			×
Index Information Index Type: C	STM_DATEST	ARTED		~	Add Index	DeleteSelected
IndexFieldTy IMM_STDINC IMM_STDINC IMM_STDINC Customer_Ni Customer_Ni CSTM_TID	pe DATE TIME D_TRANSID ame umber	Default Value	Current Value	Imaging Index N	Vame Custom F MODIFYI MODIFYI	unction1 DATETIMEFORMAT(MM/dd) DATETIMEFORMAT(HH:mm
Imaging Indexes Field 1 : Field 2 : Field 3 :	De Value if Not F	efault Values Populated in PDF	Use Follow	ring Default	Current Value Populated in PDF	
		Edit	Save	Cancel	Close	

- To <u>add an index field</u> which has been marked as "Use for Imaging" in the current document, but has not been defined using the Define New Index button,
  - o Select the Index Type from the pull down menu and click Add Index.
  - To remove an index field from the list,
    - Select the field to be deleted and click **Delete Selected**.

ndex Type:						Add Index	Dalata Sala	oted
Idex Type.	JIM_DATES	TARTED		· ·		Add Index	Delete Jele	lotou
IndexFieldTy	уре	Default Value	Current Value	Imaging Index	Name	Custom Func	tion1	
IMM_STDIN	D_DATE					MODIFYDAT	ETIMEFORM	лат(ММ
IMM_STDIN	D_TIME					MODIFYDAT	ETIMEFORM	ИАТ(НН
IMM_STDIN	D_TRANSID							
Customer_N	ame							
Customer_N	lumber							
				TID				
CSTM_TID				TID				
CSTM_TID				TID				
CSTM_TID <	[	Default Values	Use Follow	ing Default	Curre	nt Value		
CSTM_TID  CSTM_TID  Field 1 :	[ Value if Not	Default Values Populated in PDF	Use Follow	ing Default	Curre f Populat	nt Value ed in PDF		
CSTM_TID  CSTM_TID  CSTM_TID  Field 1 :  Field 2 :	[ Value if Not	Default Values Populated in PDF	Use Follow	ing Default	Curre f Populat	nt Value ed in PDF		
CSTM_TID  CSTM_TID  aging Indexes  Field 1 :  Field 2 :  Field 3 :	[ Value if Not	Default Values Populated in PDF	Use Follow	ing Default	Curre f Populat	nt Value ed in PDF		



Column names will vary according to the Imaging System selected by the Administrator.

In the upper part, all items can be edited except the Index Field Type.

IndexFieldType	Default Value	Current Value	Imaging Index Name	Smart Index LookUp	Formatted	Custom Function1	Custom Function2	Custom Function3	Custom Function4	Custom Function5
IMM_STDIND_DATE										
IMM_STDIND_TIME										
IMM_STDIND_TRANSID										
Customer_Name										
Customer_Number										
CSTM_DATESTARTED										

Information entered on this screen will take precedence over information entered at the FI Level (View/Change Index Field Types screen).

Field names will vary according to the Imaging System selected by the Administrator.

To change values in the lower part of the screen,

Click **Edit** to unlock the lower section and display Imaging Indexes related information.

• Use Following Default: Allows overwriting information from the XML with this value.

Click **Save** to save any changes and lock the lower section.

Click **Cancel** to discard any changes and lock the lower section.

Click **Close** to close the Document Indexes screen.

ocument Imagin	ng Indexes - Al	PPSUM1APPD.pc	if			
Index Information						
Index Type: 0	CSTM_DATEST	ARTED		$\sim$	Add Index Delete Selected	
Lades FieldT		DefeultVelue	Current Value	Interior Index Name	Custon Exection 1	
INDEXFIEID I	уре D DATE	Detault value	Current value	Imaging index ivame	Custom Function I	Ude
IMM_STDIN						waa Ismar
IMM_STDIN					MODIFIDATETIMEFORMAT(H	
Customer N	lame					
Customer N	lumber					
CSTM TID				TID		
< .						3
aging Indexes	D	efault Values	Use Follow	ing Default Ci	urrent Value	
Field 1 :	Value if Not F	opulated in PDF		Value if Pop	ulated in PDF	
Field 2 :						
Field 3 :						
Field 3 :		Edit	Save	Cancel	Close	

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# **Defining Text Fields**

1 Click the Design Text Fields icon (Fields > Design Text Fields).

	/ & & 🖬 🖬 🖬	🖬 🌶 🌶	BODE	3	
Document Indexes     Customer_Name     Customer_Name     Member_Name     Member_Name     Customer_DOB     Member_Namber     Loan_Namber     Ascent Namber		•	Application S	ummary	[00001-e1] Teller Number: 9999
-Application_Number	Index Fields				
- SSN - IMMUSERID	Customer Name	Member Nu	mber A	pplication Number	DOB
- CSTM_DATESTARTED	John Smith	11223344	5:	5554	03-23-1952
CSTM_LOANPURPOSE	Customer Number	Loan Numb	er S	SN	Loan Purpose
Fields	11223344	105	0	00-98-1234	Car Loan
- Party Information	Member Name	Account Nu	mber D	ate Started	Loan Amount
	John Smith	123456-1		1/01/2018	23,999.00
	Security Collateral	A	oplication Type		
	Car, House, Watch	u d	G Individual G Joint G Variable G Fixed		
	Party Fields	Pa	Party 1		
	First Name	First Name John Last Name Smith			
	Last Name				
	Full Name	Jo	John Smith ohns@homeemail.com		
	Home Email	joj			
	Work Email	johns@workemail.com			
	Home Phone	99	999-555-1234		
	Signature	1			
	Signature Date				
	Initials				

**2** The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the Text Field.

Click the mouse again when you complete highlighting the region on the document.

PPSUMTAPPE Document Indexes - Customer_Name - Member_Name					[00001e1]			
Customer_DOB Member_Number Loan_Number	Application Summary Teller Number: 9999							
- Application_Number	Index Fields							
- SSN - IMMUSERID	Customer Name	Member N	umber	Application Number	DOB			
-CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952			
- CSTM_LOANPURPOSE - CSTM_LOANAMOUNT	Customer Number	Loan Number		SSN	Loan Purpose			
Fields	11223344	105		000-98-1234	Car Loan			
- Party Information	Member Name	Account Number		Date Started	Loan Amount			
	John Smith	123456-1 0		01/01/2018	23,999.00			
	County Collatoral		Application Ty	Dê				
	Car, House, Watch	m in		Joint Fixed				
	Party Fields	1	Party 1					
	First Name		John Smith John Smith					
	Last Name	1						
	Full Name							
	Home Email	i	johns@homeemail.com					
	Work Email	j	johns@workemail.com					
	Home Phone		999-555-1234					
	Signature							
	Signature Date							
- 3 The Field Details window appears.
  - 1 **Field Name**: The name of the field.
  - 2 **Tool Tip**: A descriptive explanation of the field.
  - 3 **Role/Type**: The Role/Type of this field when processed through TeA RTS. Enables or disables the field based on signer.
    - Generic Locked: Locked if any signer has signed the session. (In branch processing only)
    - Generic Unlocked: Always unlocked regardless of signature status. (In branch processing only)
    - **Party #**: Field will be disabled after selected party has signed all documents in the session.

Field Details		×
Please provid	e the field details.	
General Information	n	
1 Field Name:	TXT_COLLATERAL	
2 Tool Tip:	Description of Collateral	
3 Role/Type:	Party 1 V	
4 Default Value:	No Collateral	
5	Index Field Textbox	
Data Locking	o unlocked for the selected party in remote signing Must Enter Value	
8 Font Information		
Name : Aria	IMT ~	
Size: 10		
Alignment: Lef	tJustified 🗸 🗸	
9	Ok Cancel	

- 4 **Default Value**: The valued displayed for this field when processing through TeA RTS.
- 5 **Index Field Textbox**: When checked, allows associating the value of this field with any unassigned index field. When checked, Role/Type will default to Generic Locked.
- 6 Keep Unlocked for the selected party in remote signing: When checked, this keeps the field unlocked in *DE during party signing*. (Only enabled when item 3 Party X is selected.)
- 7 **Must Enter Value**: During *party signing*, this field must be populated. (Only enabled when item **3** Party *X* is selected and item **6** is checked.)
- 8 **Font Information**: The Font Information can be altered to change the Font Name, Font Size and Alignment.



The fonts listed in this section are pulled from fonts installed on the server.

9 Action Buttons: Click OK to save and continue. Click Cancel to prevent saving changes.

**4** The eSign Admin Manager screen refreshes.

The Text Field appears and the defined region is highlighted in the document.

- Field Name Rules
  - A field with Role/Type as Generic Locked or unlocked will display Field Name only. [Ex. TXT\_COLLATERAL]
  - A field with Role/Type as Party will display Field Name with Party Number. [Ex. TXT\_COLLATERAL (Party 1)]



Defined text field areas will not hide or cover up any underlying elements when the PDF document is processed through IMM eSign RTS.

SUMIAPPE	🖌 🎭 🎭 🖬 🖬 🖬	) 🗾 🎤	P 👌 🗅 (				
ocument indexes Customer_Name - Customer_Namber - Member_Name - Member_Name - Laan_Namber		Application Summary Teller Number: 599					
- Account_Number - Accilention Number	Index Fields				Tener Aumori, 777		
- IMMUSERID	Customer Name	Member	r Number	Application Number	DOB		
- SSN - CSTM_DATESTARTED - CSTM_LOANPURPOSE - CSTM_LOANAMOUNT - First	John Smith	11223344 Loan Number 105 Account Number 123456.1		53534 SSN 000-98-1234 Date Started	03-23-1952 Loan Purpose Car Loan		
	Customer Number						
	11223344						
TXT_COLLATERAL (Pat	Member Name				Loan Amount		
	John Smith			01/01/2018	23,999.00		
	Security Collateral		Application Ty	/pe			
	TKI_COLDATENAL		Variable	Joint     Fixed			
	Party Fields		Party 1 John Smith John Smith				
	First Name						
	Last Name						
	Full Name						
	Home Email		johns@homeemail.com				
	Work Email		johns@workemail.com 999-555-1234				
	Home Phone						
	Signature						
	Signature Date						

Repeat these steps as many times as necessary to design text fields within each document.

## **Defining Checkbox Fields**

1 Click the Design Checkbox Fields icon (Fields > Design Checkbox Fields).

PSUMIAPPE Document Indexes	< 2, 2, 🖬 🖬 🖬		Pàdi					
Cutorier, Juniter - Cutorier, Dolt - Mercher, Name - Loan, Namber - Accourt, Namber - Accourt, Namber - Accourt, Namber - Ministerio - SSN - CSTL (DATPSTARTED - CSTL (		Application Summary Teller Number: 92						
	Index Fields			1	1.50			
	Customer Name	Member	r Number	Application Number	DOB			
	John Smith	1122334	4	55554	03-23-1952			
	Customer Number	Loan Number		SSN	Loan Purpose			
	11223344	105		000-98-1234	Car Loan			
	Member Name	Account Number		Date Started	Loan Amount			
	John Smith	123456.1	L	01/01/2018	23,999.00			
	Security Collateral	Security Collateral		pè				
	TXT_COLLATERAL	TXT_COLLATERAL		□ Joint □ Fixed				
	Party Fields		Party 1					
	First Name		John					
	Last Name		Smith					
	Full Name		John Smith					
	Home Email		johns@homeemail.com					
	Work Email		johns@workemail.com					
	Home Phone		999-555-1234					
	Signature							
	Signature Date							
	Initials							

**2** The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the Checkbox Field.

Click the mouse again when you complete highlighting the region on the document.

PPSUMIAPPE Document Indexes	/ & & 🖬 🖬 🖬						
- Customer_Number - Customer_DOB - Member_Name - Member_Number - Loan_Number - Account_Number	Application Summary Teller Number: 9999						
- Application_Number	Index Fields						
- MMUSEND - SSN - SSN - CSTM_DATESTARTED - CSTM_LOANUNROSE - CSTM_LOANUNROUNT - Reds - TXT_COLLATERAL (Pat - Paty Information	Customer Name	Member Number	Application Number	DOB			
	John Smith	11223344	55554	03-23-1952			
	Customer Number	Loan Number	SSN	Loan Purpose			
	11223344	105	000-98-1234	Car Loan			
	Member Name	Account Number	Date Started	Loan Amount			
	John Smith	123156-1	01/01/2018	23,999.00			
	Security Collateral	Application	Type				
	TXT_COLLATERAL		Joint				
	L	and the second	Fixed				
	Party Fields	Party 1					
	First Name	John					
	Last Name	Smith					
	Full Name	John Smith					
	Home Email	johns@home	email.com				
	Work Email	johns@worke	mail.com				
	Home Phone	999-555-1234	1				
	Signature						
	Signature Date						
	Initials						

- **3** The Field Details window appears, which allows the administrator to define the checkbox field with an appropriate field name.
  - 1 **Field Name**: The name of the field.
  - 2 **Tool Tip**: A descriptive explanation of the field.
  - 3 **Role/Type**: The Role/Type of this field when processed through TeA RTS. Enables or disables the field based on signer.
    - Generic Locked: Locked if any signer has signed the session. (In branch processing only)
    - Generic Unlocked: Always unlocked regardless of signature status. (In branch processing only)

Field Details	×
Please provide the field details.	
General Information	
1 Field Name: CHK_INDIVIDUAL	
Tool Tip: Individual Loan Application Checkbox	
Bole/Type: Party 1	
4 Default Value: Unchecked ~	
5 Index Field Textbox	
Data Locking	
8 Font Information	
Name : AdobePiStd ~	
Size: 10	
9 Ok Cancel	

- **Party #**: Field will be disabled after *selected party* has *signed all documents* in the session.
- 4 **Default Value**: The valued displayed for this field when processing through TeA RTS.
- 5 Index Field Textbox: Not used for this field.
- 6 Keep Unlocked for the selected party in remote signing: When checked, this keeps the field unlocked in *DE during party signing*. (Only enabled when item 3 Party X is selected.)
- 7 **Must Enter Value**: During *party signing*, this field must be populated. (Only enabled when item **3** Party *X* is selected.)
- 8 **Font Information**: The Font Information can be altered to change the Font Size, which is used for the size of the tick mark placed in the checkbox during processing.



The fonts listed in this section are pulled from fonts installed on the server.

9 Action Buttons: Click OK to save and continue. Click Cancel to prevent saving changes.

4 The eSign Admin Manager screen refreshes.

The Checkbox Field appears and the defined region is highlighted in the document.

- Field Name Rules
  - A field with Role/Type as Generic Locked or unlocked will display Field Name only. [Ex. TXT\_COLLATERAL]
  - A field with Role/Type as Party will display Field Name with Party Number. [Ex. TXT\_COLLATERAL (Party 1)]

PSUMUAPYE Document holows	/ & & 🖬 🖬 🖬	1 🖬 🥕	200	0.0			
- California 201 - Marcian, Views - Califord, Califord -	Application Summary Teler Swater 999						
	Index Fields			and the second s	and a to		
	Customer Name	Member Number		Application Number	008		
	John Smith	11223344		35534	45-23-1952		
	Customer Number	Loan Number		55N	Loan Purpose		
	11223344	103		000-96-1234	Car Lose		
	Member Name	Account Number		Date Started	Loan Amount		
	John Smith	123436-1		05/05/2018	25,999.00		
	Security Collateral						
	THT_COLLATERAL		15	D Joint D Fixed			
	Party Fields		Party 1				
	First Name		John				
	Last Name		Smith				
	Full Name		John Smith				
	Home Email		johns@honeemail.com				
	Work Email		johns@workemail.com				
	Home Phone		999-555-1254				
	Signature						
	Signature Date		-				
	Initials						

Repeat these steps as many times as necessary to design checkbox fields within each document.

## **Checkbox Field Caption**

1 Select Add Caption to create a caption for a checkbox field.

Right-click the Checkbox field.

Select Add Caption from the dropdown menu.

### Or

Right-click on the Checkbox Field in the Defined Field List and select Add Caption.

SUM1APPE					
Customer_Na Customer_Na Customer_DO Member_Nam Member_Num Loan_Number	né nber B e ber		Application	on Summary	(D0001.e1) Teller Number: 9999
Application_N	unber	Index Fields			
- IMMUSERID		Customer Name	Member Number	Application Number	DOB
-CSTM_DATE	STARTED	John Smith	11223344	55554	03-23-1952
CSTM_LOANPURPOSE CSTM_LOANAMOUNT Relds	Customer Number	Loan Number	SSN	Loan Purpose	
		11223344	105	000-98-1234	Car Loan
TXT_COLLATERAL (Pat	LIGHL (Pat)	Member Name	Account Number	Date Started	Loan Amount
Party Information	Loit	shn Smith	123456-1	01/01/2018	23,999.00
	Est Dejete	ecurity Collateral	Application Ty	00	
	Move Up	T_COLLATERAL	Readiantial	- loint	
	Move Down	1.00	Įdit	bead	
	Add Caption	atter Fields	P Dejete		
		First Name	19 Move Up		
		Last Name	S in Move Do	wm	
		Full Name	Add Cant	lien	
		Home Email	phine Whomeen	and com	
		Work Email	johns@workema	ail.com	
		Home Phone	999-555-1234		
		Signature			
		Signature Date			
		-			

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### **2** The mouse cursor changes.

Γ

If you are continuing from defining a Checkbox field, the mouse cursor will not change. The mouse cursor will remain a pointing hand ().

Click and drag the mouse over the region of the document that will contain checkbox caption.

Click the mouse again when you complete highlighting the region on the document.

PPSUM1APPE Document Indexes Customer_Name Customer_Nomber Customer_DO8				(0001-a).	
Member_Number Loan_Number	<b></b>	Applica	tion Summary	Teller Number: 9999	
- Account_Number	Index Fields				
- IMMUSERID	Customer Name	Member Number	Application Number	DOB	
CSTN_DATESTARTED CSTM_LOANPURPOSE CSTM_LOANAMOUNT Fields TXT_COLLATERAL (Per CHK_INDEVID(A) (Per	John Smith	11223344	55554	03-23-1952	
	Customer Number	Loan Number	SSN	Loan Purpose Car Loan	
	11223344	105	000-98-1234		
	Member Name	Account Number	Date Started	Loan Amount	
- Party Information	John Smith	1234.1-1	01/01/2018	23,999.00	
	Security Collateral	application	Гуре		
	TXT_COLLATERAL	a.	□ Joint □ Fixed		
	Party Fields	Party 1			
	First Name	John			
	Last Name	Smith			
	Full Name	John Smith	John Smith		
	Home Email	johns@home	johns@homeemail.com		
	Work Email	johns@worke	johns@workemail.com		
	Home Phone	999-555-123	4		
	Signature				
	Signature Date				
	1.1.1.1				

**3** The Field Details window appears.

In the Tool Tip field, enter a descriptive explanation of the Caption.

The Field Name shows it is related to CHK\_INDIVIDUAL. The TeS is for TotaleSign.

The Font Information can be altered to change the Font Size to set the size of the text used in the Checkbox Field Label.

Click OK.

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Field Details	×
Please provide the field details.	
General Information	
Field Name: CHK_INDIVIDUAL_TES_LABEL	
Caption Individual	
Font Information	
Name : AriaIMT ~	
Size: 10	
Ok Cancel	

**4** The TotaleSign Admin Index Manager screen refreshes.

The Checkbox Field Caption appears and the defined region is highlighted in the document.

Coold ( )					
xes Name Number XXB ame umber ber		Application	n Summary	(0001.a)	
Number	Index Fields				
D	Customer Name	Member Number	Application Number	DOB	
STM_DATESTARTED -CSTM_DATESTARTED -CSTM_DANPURPOSE -CSTM_DONMOUNT -CSTM_DONMOUNT -TXT_COLLATERAL (Per -TXT_COLLATERAL (Per -CHK_INDURLAL_TES -CHK_INDURLAL_TES	John Smith	11223344	35554	03-23-1952	
	Customer Number	Loan Number	SSN	Loan Purpose Car Loan	
	11223344	105	000-98-1234		
	Member Name	Account Number	Data Readed		
		Presount muniper	Uate Started	Loan Amount	
NDUAL_TES_	John Smith	123456-1	01/01/2018	23,999.00	
AL_TES_	John Smith Security Collateral TXT_COLLATERAL	123436-1 Application Type C Epdendual	01-01/2018	23,999.00	
ES_	John Smith Security Collateral TXT_COLLATERAL Party Fields	123436-1 Application Type and and and and and and and and and and	Joint Fixed	Loan Amount 23.999.00	
εš_	John South Security Collateral TXT_COLLATERAL Party Fields First Name	Application Type C Rodondual 12	Joint	Loan Amount 23.999.00	
	John South Security Collateral TXT_COLLATERAL Party Fields First Name Last Name	Application Type	Joint	Loan Amount 23,999.00	
TES	John Seuth Security Collateral TXT_COLLATERAL Party Fields First Name Last Name Full Name	Party 1 John Smith John Smith	Joint	Loan Amount 23.999.00	
<u> </u>	John Smith Security Collateral TXT_COLLATERAL Party Fields First Name Last Name Full Name Home Email	Party 1 John Smith john Smith john Smith	Joint Joint Comment	Loan Amount 23,999.00	
	Joba Smith Security Collateral Daty_COLLATERAL Party Fields First Name Last Name Full Name Home Email Work Email	Party 1 John Smith John Smith John Smith John Smith	Loom Com	Loan Amount 23.599.00	
TES	Joba Senth Security Collateral IXT_COLLATERAL Party Fields First Name Last Name Full Name Home Email Work Email Home Phone	Party 1 John Smith John Smith John Smith John Smith John Smith John Smith John Smith John Smith	Loom Com	Loan Amount 23.999.00	
TES,	John Smith Security Collateral TxT_COLLATERAL Party Fields First Name Last Name Home Email Work Email Home Phone Signature	Party 1 John Smith John Smith John Smith John Smith John Smith John Strate	Loom	Loan Amount 23.999.00	
NDUAL_TES_	Jobn Smith Security Collateral TXT_COLLATERAL Party Fields First Name Last Name Home Email Work Email Home Phone Signature Signature	Party 1 John Smith John Smith John Smith John Smith John Smith Johns@workemal 999-555-1234	Loom Com	Loan Amount 23.599.00	



Caption areas will not hide or mask any underlying elements when the PDF document is processed through IMM eSign RTS.

Repeat these steps as many times as necessary to design checkbox caption fields within each document.

**5** In this example, the word "Variable" did not fully show within the region.

Right-click the region,

Select Edit.

Change the font size to a smaller font. (We used 8.)

Click OK.

The smaller font size allows the full word to appear.

		Applicatio	n Summary		Telle	(D0031-c)	
Index Fields							
Customer Name	DOB		Date Started		Loan Purpo	se	
John Smith	03-23-1	952	06-01-2015		Car Loan		
Customer Number	Loan N	lumber	SSN		Loan Amou	Amount	
11223344	105		000-98-1234		21,950.00		
Account Number							
123456-1							
Security Collateral		Application Typ	e	1V	anabl		
TXT_COLLATERAL		T Induities	□ Joint □ Fixed				
Party Fields		Party 1		Par	riable		
First Name		John					
Last Name		Smith					
Full Name		John Smith					
Home Email		johns@homeemail.com					
Signature							
Signature Date							
1.55.1		-		-			

## Defining Signature Fields (Not Applicable for Dynamic Documents)

Signature Fields (Not Applicable for Dynamic Documents)

1 Click the Design Signature Field icon (Fields > Design Signature Field).

		· • •	P 2 4 8		
kdexes ier Name ier JobB ir Name ir Name w Number Kunber			Applicatio	on Summary	(D000.a)
Number Index Fiel	ds				
Customer	Name	Member	Number	Application Number	DOB
John Smith		11223344		55554	03-23-1952
Customer	Number	Loan Number		SSN	Loan Purpose
11223344		105 Account Number		000-98-1234	Car Lean
aty Member N	lame			Date Started	
John Smith		123456-1		01/01/2018	23,999.00
Security (	Collateral		Application Typ	e	
TXT_COLLA	TXT_COLLATERAL		IC Individual IC IVariable	□ Joint □ Fixed	
Party Fiel	ds		Party 1		
First Nam	e		John		
Last Nam	e		Smith		
Full Name	й		John Smith		
Home Em	ail		johns@homeemail.com		
Work Ema	all .		johns@workemail.com		
Home Phe	one		999-555-1234		
Signature	6				
Signature	Date				
Initiale			-		

2 The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the Signature Field.

Ele fidit Estraction Fields Party Tools View Help - 🗉 🚍 🕿 🛃 🔩 🖬 🖬 🖬 🖬 🥕 🖉 🗅 🗅 🖃 0 APPSUMIAPPE PSUM1APPE Document Indexes Customer\_Name Customer\_Nome - Customer\_Nome - Member\_Number - Loan\_Number - Annount Number (D0061-c1 Application Summary Teller Number: 9999 n\_Numbe Index Fields DOB Customer Name ember Number SSN CSTM\_DATESTARTED CSTM\_LOANPURPOSE CSTM\_LOANAMOUNT John Smith 11223344 55554 03-23-1952 SSN Customer Number Loan Number Loan Purpos 11223344 105 000 98 1234 Car Loan CHK\_INDIVIDUAL (Party CHK\_INDIVIDUAL\_TES\_ CHK\_VARIABLE (Party 1 CHK\_VARIABLE\_TES\_L Member Name Account Number Date Started Loan Amoun 23,999.00 John Smith 123456-1 01/01/2018 TXT\_COLLATERAL (Pa Security Collateral Application Type IC Individual IC IVanable □ Joint □ Fixed Party Fields Party 1 First Name John Smith Last Name Full Name John Smith johns@homeemail.com johns@workemail.com Home Email Work Email Home Phone 10.0 Signature Signature Date Initials Page:1 of 1 essfully loaded file

Click the mouse again when you complete highlighting the region on the document.



If the Signature Field size is incorrect, the signature may be truncated or distorted.

The **Signature Field size** should be at least 0.4 in (H)  $\times$  1.2 in (W) and can be scaled up.

The Signature Field width should not be more than three times its height.

Signature Field size can be confirmed by processing the document and reviewing the archived document.

**3** The Field Details window launches.

The Field Name cannot be changed.

- **1 Signer**: Select a Party from the Signer dropdown to associate with the signature in the field (more information in **Defining Party Information** on page 58).
- 2 **Tool Tip**: Enter a descriptive explanation of the signature field.
- **3 Required**: When checked, the signature field must be signed during processing of this document.
- 4 Click **OK**.

Field Details		×
Please provid	e the field details.	
General Informatio	'n	
Field Name:	TEAWEB_SIG_P1_1	
1 Signer:	Party 1 V	
2 Tool Tip:	Party 1 Signature	
3	Required	
Font Information		
Name :	ArialMT	~
Size:	10	
Alignment:	LeftJustified	$\sim$
4	Ok Cancel	

4 The eSign Admin Manager screen refreshes.

The Signature Field appears and the defined region is highlighted in the document.

	🛃 🎭 🎭 🖬 🖬 🖬	🖬 🎤 🎤 🗋 I						
Document Indexes     Customer_Name     Customer_Name     Customer_D08     Member_Name     Member_Name     Loan_Namber     Loan_Namber	Application Summary							
- Account_Number - Application_Number	Index Fields							
- IMMUSERIO	Customer Name	Member Number	Application Number	DOB				
-CSTM_DATESTARTED	John Smith	11223344	55554	03-23-1952				
-CSTM_LOANPURPOSE	Customer Number	Loan Number	SSN	Loan Purpose				
Reids	11223344	105	000 98 1234	Car Loan				
CHK_INDIVIDUAL (Party CHK_INDIVIDUAL TES	Member Name	Account Number	Date Started	Loan Amount				
- CHK_VARIABLE (Party 1)	John Smith	123456-1	01/01/2018	23,999.00				
THT_COLLATERAL (Par	Security Collateral	Applicatio	n Type					
Party momation	TXT_COLLATERAL	IC Individe IC IVanabl	Joint					
	Nurty Fields	Party 1						
	First Name	John						
	Last Name	Smith						
	Full Name	John Smith						
	Home Email	johns@ho	neemail.com					
	Work Email	johns@wo	rkemail.com					
	Home Phone	999-555-1	234					
	Signature	TEAWEB_SK	PU					
	Signature Date							
	1. ht. 1.							

Repeat these steps as many times as necessary to design signature fields within each document.

### Signature Date Fields (Not Applicable for Dynamic Documents)

1 Select Design Signature Date to create unique signature dates for each *signature field*.

Right-click the Signature field

#### Or

Right-click the Signature field name in the tree view.

#### Select Design Signature Date.

(Fields > Design Signature Date or right-click on the Signature Field in the Defined Field List and select Design Signature Date.)

) 💫 🚺 🔄 🖬	a 🛃	2, 8,	•	🖪 🎤	PDDD					
APSUMLAPE Document Idents Cutationer, Name Cutationer, Name Metter, Vanner Metter, Vanner Account, Namber Account, Namber Metter, Vanner Account, Namber Metter, Vanner Metter, Van					Applicatio	on Summa	ry		Tel	(D0001-e1)
	1	Index Field	5							
		Customer I	Name	Membe	Number	Applicatio	n Nu	umber	DOB	1
		John Smith Customer Number		1122334	1	55554			03-23-1952	
	1			Loan Number		SSN			Loan Purpose	oose
		11223344		105		000-98-1234			Car Loan	
CHK_NOIVIDUA CHK_NOIVIDUA CHK_VARIABLE CHK_VARIABLE TXT_COLLATER Monthil	lit		ne	Account	Account Number		Date Started		Loan Amo	sunt
	lete			123456-		01/01/2018			23,999.00	
	ove Up		lateral		Application Typ	e	_			
Party Information	ove Down		241		IC Individual D		D Joint			
		Date:			IC (Vanable	Fixed	_	_		
	aign aignai	Party Fields			Party 1					
		First Name	First Name		John Smith					
	1 1	Last Name					_			
	1 1	Full Name	£		thomeemail.com					
	1 0	Home Ema	il 🛛							
		Work Emai	(	<b>`</b>	gworkerna	iil.com				
		Home Phone	10		999-55-1234			Edit		1
		Signature			TEAWEB_SIG_P1_1		-	Delete		
	11	Signature I	Date				101	Mounths		
	1 1	Initials	01020					orave Th		-

**2** The mouse cursor changes to a pointing finger.

Click and drag the mouse over the region of the document that will contain the Signature Date.

Click the mouse again when you complete highlighting the region on the document.

SUMIAPPE Document Indexes	K 25 35 10 10 10		1000					
Customer_Name     Customer_Name     Customer_D08     Member_Name     Member_Name     Loan_Namber     Account Namber	(00011-e1) Application Summary Teller Number 9999							
- Application_Number	Index Fields		111	1				
- IMMUSERID	Customer Name	Member N	umber	Application Number	DOB			
-CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952			
-CSTM_LOANPURPOSE	Customer Number	Loan Number		SSN	Loan Purpose			
Fields	11223344	105		000 98 1234	Car Loan			
CHK_INDIVIDUAL (Party CHK_INDIVIDUAL TES	Member Name	Account Number		Date Started	Loan Amount			
CHK_VARIABLE (Party 1	John Smith	123456-1		01/01/2018	23,999.00			
TXT_COLLATERAL (Pat	Security Collateral		Application Type					
Party Information	TXT_COLLATERAL	3	C Individual Variable	□ Joint □ Fixed				
	Party Fields	1	Party 1					
	First Name		John					
	Last Name	1	Smith					
	Full Name		John Smith					
	Home Email	1	johns@homeemail.com					
	Work Email	j	johns@workemail.com					
	Home Phone		999-555-1234					
	Signature		FAMER SIG PI 1					
	Signature Date							
	Indiana	-	10					

**3** The Field Details window will launch, which allows the administrator to associate the signature date field with an appropriate signature field name.

The Signature Date field is automatically associated with a Signature field.

- 1 In the Tool Tip field, enter a descriptive explanation of the signature date field.
- 2 The Font Information can be altered to change the Font Type, Font Size and Alignment.
- 3 Click OK.

In the Tool Tip field, enter a descriptive explanation of the signature date field.

The Font Information can be altered to change the Font Name, Font Size and Alignment.

Click OK.

Field Details		×
Please provid	e the field details.	
General Informatio	n	
Field Name:	TEAWEB_SIG_P1_1_DATE	
1 Tool Tip:	Party 1 Signature Date	
Font Information		
2 Name : Aria	IMT ~	
Size: 10		
Alignment: Left	Justified $\checkmark$	
	3 Ok Cancel	

4 The eSign Admin Manager screen refreshes.

The Signature Date field appears and the defined region is highlighted in the document.

APPSUMIAPPE Document Indexes Cutomer_Name Cutomer_Name Cutomer_O08 Member_Qiane Hember_Name Hember_Name	Application Summary							
- Account_Number - Application_Number	Index Fields							
- IMMUSERID	Customer Name	Membe	r Number	Application Number	DOB			
-CSTM_DATESTARTED	John Smith	1122334	4	55554	03-23-1952			
-CSTM_LOANPURPOSE -CSTM_LOANAMOUNT	Customer Number	Loan N	umber	SSN	Loan Purpose			
Pelds	11223344	105		000 98 1234	Car Loan			
CHK_INDIVIDUAL (Party CHK_INDIVIDUAL TES	Member Name	Account Number		Date Started	Loan Amount			
CHK_VARIABLE (Party 1	John Smith	123456	I	01/01/2018	23,999.00			
TXT_COLLATERAL (Pat	Security Collateral		Application Type					
TEAWEB_SK3_P1_1_DA	TXT_COLLATERAL		IC Individual IC IVariable	□ Joint □ Fixed				
	Party Fields		Party 1					
	Firs Name		John					
	Last Name		Smith					
	Full Name		John Smith					
	Home Email		johns@homeemail.com					
	Work Email		johns@workemail.com					
	Home Phone		999-555-1234					
	Signature		TEAWER_SIG_P1_1					
	Signature Date	- 1	1 DATE					
	In Marketon		A R R R R R R R R R R R R R R R R R R R					



Date field areas will not hide or mask any underlying elements when the PDF document is processed through IMM eSign RTS.

Repeat these steps as many times as necessary to design signature date fields within each document.

## **Defining Initial Fields** (Not Applicable for Dynamic Documents)

1 In the document, scroll to the area that will contain the initials field.

Click the Design Initials Fields icon (Fields > Design Initials Fields).

IM1APPE									
Document Indexes - Custome_Name - Custome_Namber - Custome_DOB - Member_Name - Member_Namber - Loan Number		Application Summary							
Account_Number Application_Number	Index Fields								
IMMUSERID	Customer Name	Member	Number	Application Number	DOB				
CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952				
CSTM_LOANPURPOSE	Customer Number	Loan Number		SSN	Loan Purpose				
ida	11223344	105		000-98-1234	Car Loan				
CHK_INDIVIDUAL (Party CHK_INDIVIDUAL TES	Member Name	Account Number		Date Started	Loan Amount				
CHK_VARIABLE (Party 1	John Smith	123436-1		01/01/2018	23,999.00				
TXT_COLLATERAL (Part	Security Collateral		Application Typ	e					
ty Information	TXT_COLLATERAL		C Individual C Variable	□ Joint □ Fixed					
	Party Fields		Party 1						
	First Name		John						
	Last Name		Smith						
	Full Name		John Smith						
	Home Email		johns@homeemail.com						
	Work Email		johns@workemail.com						
	Home Phone		999-555-1234						
	Signature								
	Signature Date								
	Initiale		-						

2 The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the Initial Field.

Click the mouse again when you complete highlighting the region on the document.

Document Indexes - Guistomer_Name - Customer_Nameer - Customer_D08 - Member_Name - Member_Namer - Loss Munder		Applica	tion Summary	[D001-e1]					
-Loan_Number Account_Number	Teller Number: 9999								
- Application_Number	Index Fields	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1							
- IMMUSERID - SSN	Customer Name	Member Number	Application Number	DOB					
-CSTM_DATESTARTED	John Smith	11223344	55554	03-23-1952					
- CSTM_LOANPURPOSE - CSTM_LOANAMOUNT	Customer Number	Loan Number	SSN	Loan Purpose					
Fields	11223344	105	000-98-1234	Car Loan					
CHK_INDIVIDUAL (Party)	Member Name	Account Number	Date Started	Loan Amount					
- CHK_VARIABLE (Paty 1)	John Smith	123456-1	01/01/2018	23,999.00					
-TXT_COLLATERAL (Pat	Security Collateral	Application 1	Application Type						
TEAWEB_SK3_P1_1_DA Party Information	TXT_COLLATERAL	IC lindividual IC IVanable	□ Joint □ Fixed						
	Party Fields	Party 1	Party 1						
	First Name	John							
	Last Name	Smith							
	Full Name	John Smith							
	Home Email	johns@home	email.com						
	Work Email	johns@worke	mail.com						
	Home Phone	999-555-1234							
	Signature	TEAWEB_SIG_P	U						
	Signature Date	TEAMER_SIG_P	1						



If the Initial Field size is incorrect, the initials may be truncated or distorted. The **Initial Field size** should be *at least 0.263 in (H) x 0.167 in (W)* and can be scaled up.

The Initial Field width should not be more than three times its height.

Initial Field size can be confirmed by processing the document and reviewing the archived document.

**3** The Field Details window launches, which is used by the administrator to define the signature field with an appropriate field name.

The Field Name cannot be changed.

- 1 **Signer**: Select a Party from the Signer dropdown to associate with the initials in the field (more information in **Defining Party Information** on page 58).
- 2 **Tool Tip**: Enter a descriptive explanation of the signature field.
- **3 Required**: When checked, the initial field must be completed during processing of this document.
- 4 Click **OK**.

Field Details		×
Please provid	e the field details.	
General Information	n	
Field Name:	TEAWEB_INI_P1_1	
1 Signer:	Party 1 V	
2 Tool Tip:	Party 1 Initials	
3	Required	
Font Information -	ArialMT	
Name .		<u> </u>
Size:	10	
Alignment:	LeftJustified	$\sim$
4	Ok Cancel	

4 The eSign Admin Manager screen refreshes.

The Initials Field appears and the defined region is highlighted in the document.

S 🗐 🗟 🖻	🖌 🎭 🎭 🖬 🖬 🖬	🖬 🎤 🎤 🤅			
Decument Indexes - Cutatomer, Name - Customer, Namber - Customer, DOB - Member, Number - Member, Number - Loan, Namber		Ap	plication Su	mmary	[D0001.e1]
- Account_Number - Application_Number	Index Fields				
- IMMUSERID	Customer Name	Member Numb	r App	lication Number	DOB
-CSTM_DATESTARTED	John Smith	11223344	555	54	03-23-1952
CSTM_LOANPURPOSE	Customer Number	Loan Number	55	4	Loan Purpose
ields	11223344	105	000	98-1234	Car Loan
CHK_INDIVIDUAL (Party	Member Name	Account Numb	ar Dat	e Started	Loan Amount
-CHK_VARIABLE (Paty 1)	John Smith	123456-1	01/0	1/2018	23,999.00
- TEAWEB_INI_P1_1	Security Collateral	Appli	ation Turns		
TEAWEB_SKG_P1_1 TEAWEB_SKG_P1_1_DA TXT_COLLATERAL (Pat	TXT_COLLATERAL	IC III	ividual U J	oint	
	Party Fields	Party	1		
	First Name	John	John		
	Last Name	Smith	Smith		
	Full Name	John	John Smith		
	Home Email	johns	johns@homeemail.com		
	Work Email	johns	johns@workemail.com		
	Home Phone	999-5	999-555-1234		
	Signature	TEAWE	B_SIG_P1_1		
	Signature Date	TEAN	E_SIG_PT		
	Initiale	TENNE			

Repeat these steps as many times as necessary to design initials fields within each document.

## **Defining Party Information** (Not Applicable for Dynamic Documents)

### What's a Party?

No hats or noisemakers. For our purposes, a Party is a person. Documents may have one or more parties included. Party fields are used throughout IMM eSign.

If you are processing a document that contains information for more than one person, then the first person listed would be Party 1. The next person listed will be Party 2. Additional people will be Party 3, 4, etc.

If you are processing an account application, the Member may be the only Party on the document.

#### Party 1?

In the case of a loan application that will be submitted for a digitized signature online, the first person listed (Primary Applicant) would be Party 1. Any co-applicants would be Party 2, 3, etc. Some loan applications only have room for 1 or 2 applicants, so an additional loan application may need to be submitted with only the remaining party information. Other documents may be submitted that only contain information for a single party.

When using Remote Signatures and the document set is submitted for digitized signatures, Party 1 has to sign the document first, before Party 2 receives the document set for signing. Party 3 will only receive the document set after Party 1 and Party 2 have signed the documents.

Party Name (Party 1, Party 2, etc.) definitions are used to associate other related fields together. Signature Fields for Party 1, Address Fields for Party 1, etc. – all will be associated by the Party 1 Name Field.

Party fields will be used to populate the IMM eSign Remote Signature screen.

Regions used for Index Fields can also be used for Party information.

Only the following Party fields are required for processing documents with signature blocks:

- Customer Name Customer Name is typically first and last name together. The individual parts of Customer Name could also be used for Party - First Name and Party - Last Name.
- 2) Email
- 3) Phone

Additional fields in examples are not required to be defined.

Party fields can overlap index fields.

1 Click the Add Party Information icon (**Party > Add Party Information**) (Shift-F5).

	28.000	•	• 2 D P		
Customer_Name     Customer_Namber     Customer_Do08     Member_Name     Member_Name     Member_Name     Associations			Applicatio	on Summary	(D0001-e1) Teller Number: 9995
- Application_Number	Index Fields	1000			
- IMMUSERID	Customer Name	Member I	Number	Application Number	DOB
-CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952
CSTM_LOANPURPOSE	Customer Number	Loan Number		SSN	Loan Purpose
Fields	11223344	105		000-98-1234	Car Loan
CHK_INDIVIDUAL (Party CHK_INDIVIDUAL TES	Member Name	Account Number		Date Started	Loan Amount
- CHK_VARIABLE (Party 1	John Smith	123456-1		01/01/2018	23,999.00
TEAWEB_INLP1_1	Security Collateral		Application Typ	e	
TEAWEB_SK3_P1_1 TEAWEB_SK3_P1_1_DA TXT_COLLATERAL (Pat	TXT_COLLATERAL		IC Individual IC IVariable	□ Joint □ Fixed	
arty information	Party Fields		Party 1		
	First Name		John		
	Last Name		Smith		
	Full Name		John Smith		
	Home Email		iohns@homeemail.com		
	Work Email		johns@workemail.com		
	Home Phone		999-555-1234	1002000	
	Signature		TEAWEB_SIG_P1_1		
	Signature Date		TEAWER_SIG_PT		
	Initials		TEAWEB		

**2** The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the Party Field.

Click the mouse again when you complete highlighting the region on the document.

eSign Admin Manager - AppSumTM	APLT_1apps_00001-e1_20180117.pd	Ĵ.			- 0
e Edit Extraction Fields Ba	rty Taols ⊻iew <u>H</u> elp				
	/ 2. 2. 00 00 00		- A B B		
APPSUMTAPPE					
Document Indexes					
- Customer_Number					
- Customer_DO8					(D0081-e1
- Menber_Number			Applicatio	on Summary	
- Loan_Number					Teller Number: 9999
- Application_Number	Index Fields				
- IMMUSERID	Customer Name	Member Number		Application Number	DOB
-CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952
-CSTM_LOANPURPOSE	Customer Number	Loan Number		SSN	Loan Purpose
<ul> <li>Fields</li> </ul>	11223344	105		000-98-1234	Car Loan
- CHK_INDIVIDUAL (Party - CHK_INDIVIDUAL TES	Member Name	Account Number		Date Started	Loan Amount
CHK_VARIABLE (Paty 1	John Smith	123456-1		01/01/2018	23,999.00
- TEAWEB_INI_P1_1	Ensuity Collectoral		Analisation Tor		
- TEAWEB_SKG_P1_1	TXT COLLATERAL		Application Typ	RE CT Inited	
TXT_COLLATERAL (Pat			C (Variable	Fixed	
- Party Information	1000000000				
	Party Fields		Party 1		
	First Name		John		
	Last Name	f	and the		
	Full Name		Uohn Smith		
	Home Email		johnsignomeemail.com		
	Work Email		johns@workemail.com		
	Home Phone		999-555-1234		
	signature		CANCELSIG_PC1		
	Signature Date		1 DATE		
	Initiala		CAMER		

**3** The Party Details window appears, which allows the administrator to select the party and select the information with an appropriate field name.

This information will be used to populate the fields in the Remote Signature screen.

Documents in Remote Signature are chained together based on the name of the applicant.

Select a Party from the dropdown.

If this is the first party being defined,

Select Party 1.

fields.

For **Applicant Information**, either *FULLNAME* or *LASTNAME* and *FIRSTNAME* must be defined. This example will use *FULLNAME*.

Select FULLNAME from the dropdown.

Click OK.

Soloot the Fall	y this extraction	on belongs to	
Party 1			
elect the type	of extraction	:	
FULLNAME			
election Text : John Smit	: th		
	Ok	Cancel	

**4** The TotaleSign Admin Index Manager screen refreshes.

The Party Information appears and the defined region is highlighted in the document.

Call Lightaction Fields Earl	V 1000 Yew Help	D 🔎 ,	PDDI		
Document Indexes - Customer_Namber - Customer_Namber - Customer_D08 - Member_Name - Member_Namber - Loan_Namber - Account I Manher			Applicati	on Summary	[D0003e1] Teller Number: 9999
Application_Number	ion_Number Index Fields		1		
- IMMUSERID SSN	Customer Name	Member	Number	Application Number	DOB
-CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952
CSTM_LOANAMOUNT	Customer Number	Loan Nu	mber	SSN	Loan Purpose
Fields	11223344 105		5 000-98-1234		Car Loan
CHK_INDIVIDUAL (Paty CHK_INDIVIDUAL_TES	Member Name	Account	Number	Date Started	Loan Amount
- CHK_VARIABLE (Party 1)	John Smith	123456-1		01/01/2018	23,999.00
-TEAWEB_INI_P1_1	Security Collateral		Application Ty	De	
TEAWEB_SK3_P1_1 TEAWEB_SK3_P1_1_DA TXT_COLLATERAL (Pat	Car, House, Watch		C Individual C Vanable	□ Joint □ Fixed	
B Party 1	Party Fields		Party 1		
POLLNARE	First Name		John		
	Last Name		Smith		
	Full Name		John Smith		
	Home Email		johns@homeen	nail.com	
	Work Email		johns@workem	ail.com	
	Home Phone		999-555-1234		
	Signature		TEAWER_SIG_P1_	,	
	Signature Date		TEAWER_SIG_PT		
	Initials		TEAWEB		

5 There are two email fields available for party definitions – HomeEmail and WorkEmail. The same procedure is used for both fields.

Let's define the HomeEmail (Address) for Party 1.

Click the Add Party Information icon (Party > Add Party Information) (Shift-F5).

UNIAPPE	< 2 2 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	D 🎤 .	₽ 2 D I				
Customer_Name Customer_Name Customer_DOB Member_Name Member_Number Loan_Number		Application Summary					
- Application_Number	Index Fields	100					
- IMMUSERID	Customer Name	Member	Number	Application Number	DOB		
CSTM_DATESTARTED	John Smith	1122334	4	55554	03-23-1952		
CSTM_LOANPURPOSE	Customer Number	Loan N	umber	SSN	Loan Purpose		
sida	11223344	105		000-98-1234	Car Loan		
CHK_INDIVIDUAL (Party CHK_INDIVIDUAL TES	Member Name	Account	t Number	Date Started	Loan Amount		
CHK_VARIABLE (Party 1	John Smith	123456-1		01/01/2018	23,999.00		
TEAWER SIG PL 1	Security Collateral		Application Ty	pe			
TEAWEB_SIG_P1_1_DA TXT_COLLATERAL (Past	Car, House, Watch		C Individual C Variable	□ Joint □ Fixed			
-Party 1	Party Fields		Party 1				
FULLNAME	First Name		John				
	Last Name		Smith				
	Full Name		John Smith				
	Home Email		johns@homeen	nail.com			
	Work Email		johns@workem	ail.com			
	Home Phone		999-555-1234				
	Signature		TEAWEB_SIG_P1_	1			
	Signature Date		TEAWER_SIG_PT				
	Initials		TEAMER				

### 6 The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the Party Field.

Click the mouse again when you complete highlighting the region on the document.

APPE		1 🖬 🥕 .	P (2 11)		
erk holesos tomer Name tomer Number nber Name nber Name nber Number n Number			Applicat	on Summary	[D0001e] Teller Number: 999
slaation_Number	Index Fields				
NUSERID	Customer Name	Member	Number	Application Number	DOB
TM_DATESTARTED	John Smith	11223344		55554	03-23-1952
TM_LOANPURPOSE	Customer Number	Loan Nu	mber	SSN	Loan Purpose
	11223344	105		000 98 1234	Car Loan
K_INDIVIDUAL (Party K_INDIVIDUAL TES	Member Name	Account	Number	Date Started	Loan Amount
ARIABLE (Paty 1	John Smith	123456-1		01/01/2018	23,999.00
INI_P1_1	Security Collateral		Application Ty	rpe	
KS_P1_1_D/ ATERAL (Part	Car, House, Watch		C Individual C Variable	□ Joint □ Fixed	
	Party Fields		Party 1		
	First Name		John		
	Last Name		Smith		
	Full Name		John Smith		
	Home Email		ohns@homee	nail.com	
	Work Email		johns@worken	ail.com	
	Home Phone		999-555-1234		
	Signature		TEAWER_SIG_P1	1	
	Signature Date		TEAWER_SIG_PT		
	Initials		TEANEB		

7 The Party Details window appears.

Since we just defined FULLNAME for Party 1, Party 1 remains selected.

 $\label{eq:select} \mbox{Select HOMEEMAIL for the Type of Extraction.}$ 

Click **OK** to close the Party Details window.

🔜 Party Details	×
Select the Party this extraction belongs to:	
Party 1	~
Select the type of extraction :	
HOMEEMAIL	~
Selection Text :	
johns@homeemail.com	
Ok Cancel	

**8** The eSign Admin Manager screen refreshes.

The Party Information appears and the defined region (HOMEEMAIL) is highlighted in the document.

			a a a i		
PSUMIAPPE			7		The second s
Document Indexes - Customer_Name - Customer_Namber - Customer_D08 - Member_Name - Member_Number - Loan_Namber			Applicati	on Summary	[D0001e1] Teller Number: 9999
- Application_Number	Index Fields			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
- IMMUSERID	Customer Name	Member N	lumber	Application Number	DOB
-CSTM_DATESTARTED	John Smith	11223344		55554	03-23-1952
-CSTM_LOANPURPOSE	Customer Number	Loan Num	nber	SSN	Loan Purpose
Fields	11223344	105	000-98-1234		Car Loan
CHK_INDIVIDUAL (Paty	Member Name	Account	Number	Date Started	Loan Amount
- CHK_VARIABLE (Paty 1)	John Smith	123456-1		01/01/2018	23,999.00
CHK_VARIABLE (Party 1) CHK_VARIABLE_TES_L TEAWEB_IN_P1_1	Security Collateral		Application Ty	pe	
TEAWEB_SK3_P1_1 TEAWEB_SK3_P1_1_DA TXT_COLLATERAL (Pat	Car, House, Watch		C Individual C Vanable	□ Joint □ Fixed	
Party 1 EITEL NAME	Party Fields		Party 1		
HONEEMAIL	First Name		John		
	Lust Name		Smith		
	Full Name		John Smith		
	Home Email		ohris@homeen	nail.com	
	Work Email		johnsgworken	ali.com	
	Home Phone		999-555-1234		
	Signature	1	TEAWEB_SIG_P1_	,	
	Signature Date	1	TEAWEB_SIG_PT		
	Initials	0	TEAWEB		

**9** This similar document has information for multiple parties.

Define the Name for Party 2.

Click the Add Party Information icon (Party > Add Party Information) (Shift-F5).

Document Indexes									
Customer_Name									
Member Name						(D000).e4			
- Customer_DOB			Applicati	on Cummon					
-Member_Number	Application Summary								
- Account_Number									
- Application_Number	Index Fields								
- IMMUSERID	Customer Name	Member N	lumber	Application No	umber	DOB			
- CSTM_LOANPURPOSE	John Smith	11223344		55554		03-23-1952			
CSTM_DATESTARTED	Customer Number	Loan Num	iber	SSN		Loan Purpose			
- Fields - TEAWEB_INL_P1_1 - TEAWEB_INL_P2_1	11223344	105	000-98-1234			Car Loan			
	Member Name	Account N	lumber	mber Date Started		Loan Amount			
- TEAWEB_INI_P3_1	John Smith	123456-1		01/01/2018		23,999.00			
TEAWEB_INI_P4_1				10	- T				
TEAWEB_SIG_P1_1_DA	Security Collateral		Application Type		_				
TEAWEB_SIG_P2_1	Car, House, Watch			Joint     Fixed					
TEAWEB_SKG_P3_1					_				
- TEAWEB_SIG_P3_1_DA TEAWEB_SIG_P4_1	Party Fields	1	Party 1		Party 2				
TEAWEB_SIG_P4_1_DA	First Name		John		Jane				
Party Information	Last Name		Smith		Smith				
FULLNAME	Full Name		John Smith		Jane St	mith			
HOMEEMAIL	Home Email	1	ohns@homeen	nail.com	janes@	homeemail.com			
	Work Email	1	johns@workem	ail.com	janes@	workemail.com			
	Home Phone		999-555-1234		999-55	5-1235			
	Signature		EAWEB_SIG_P1_	U	TEAMER	_SIG_P2_1			
	Signature Date		EAWEB_SIG_P1		TEAMED	_SIG_P2			
	Initials	1	EAWEB		TEAWEB	-			

## **10** The mouse cursor changes.

Click and drag the mouse over the region of the document that will contain the next Party Field.

Click the mouse again when you complete highlighting the region on the document.

0 5 2 1	🖌 🎭 🛃 🚺 🚺	🖪 🏓	PDDI						
AAPPE									
ustoner_Name									
ustomer_Number tember_Name	(00005-a)								
tomer_DOB	Application Summary								
iber r									
		-				Teller Number: 999			
nber	Index Fields								
	Customer Name	Member	Number	Application Nun	nber	DOR			
UNT	John Smith	1122334		55554		03-23-1952			
TARTED	Customer Number	Loan Nu	imber	SSN		Loan Purpose			
3	11223344	105		000-98-1234		Car Loan			
	Member Name	Account	trumper	Date Started		Loan Amount			
	John Smith	123430-1		01/01/2018		25.999.00			
0.4	Security Collateral		Application Ty	pe					
	Car, House, Walch		C Individual	Joint					
24			(3 Variable ;	Fixed					
24	Party Fields		Party 1		Party 2				
D.4	First Name		John		Jane				
	Last Name		Smith		Smith				
	Full Name		John Smith		Jane Sn	with			
	Home Email		johns@homeer	nail.com	janes@ł	homeemail.com			
	Work Email		johns@workern	ail.com	janes@v	workemail.com			
	Home Phone		999-555-1234	5	999-555	-1235			
	Signature		TEAWEB_SIG_P1	1	TEAINEB	SIG_P2_1			
	Signature Date		TEAMEB_SIG_PT		TEAMED	SIG_P2			
	Initials		TEAWEB		TEAWER	1			

**11** The Party Details window launches.

Select a Party from the dropdown. Since this is the second party being defined,

Select Party 2.

As name is required information, only LASTNAME, FIRSTNAME or FULLNAME can be selected at this time.

Select FULLNAME from the dropdown.

Click OK.

🔜 Party Details	×
Select the Party this extraction belongs to: Party 2	~
Select the type of extraction : FULLNAME	~
Selection Text :	
Jane Smith	
Ok Cancel	

**12** The eSign Admin Manager screen refreshes.

The Party Information appears and the defined region is highlighted in the document.

Counter Indexes - Customer_Name - Customer_Name - Customer_Name - Customer_DOB - Member_Jkumber			Applicatio	on Summary		(000ma)
- Loan_Number - Account_Number				10		Teller Number: 9999
- Application_Number	Index Fields					
- IMMUSERID	Customer Name	Member N	umber	Application Nu	mber	DOB
- CSTM_LOANPURPOSE	John Smith	11223344		55554		03-23-1952
CSTM_EDARAMOONT	Customer Number	Loan Num	ber	SSN		Loan Purpose
Fields	11223344	105		000-98-1234		Car Loan
	Member Name	Account N	umber	Date Started		Loan Amount
- TEAWEB_INI_P3_1	John Smith	123456-1		01/01/2018		23,999.00
-TEAWEB_SIG_P1_1	Security Collateral		Application Typ	pe		
TEAWEB_SIG_P2_1 TEAWEB_SIG_P2_1_DA	Car, Hisuna, Walch		1 Individual 1 Variable	□ Joint □ Fixed		
TEAWEB_SIG_P3_1 TEAWEB_SIG_P3_1_DA	Party Fields	1	Party 1		Party 2	
TEAWEB_SK3_P4_1 TEAWEB_SK3_P4_1 DA	First Name		lohn		Jane	
Party Information	Last Name		Smith		Smith	
⊡ Paty 2	Full Name		John Smith		Jane Sn	with
FULLNAME	Home Email	1	ohns@homeen	ail.com	janes@ł	homeemail.com
	Work Email	1	ohns@workem	ail.com	janes@v	workemail.com
	Home Phone	1	99-555-1234		999-555	-1235
	Signature	-			TEANER	SIG_P2_1
	Signature Date				TEAMER	SIG_P2
	Initials				TEAWEB	1

**13** Repeat these steps as many times as necessary to add all party-related field definitions to the document.

## **Deleting a Document Definition**

### **Delete from Defined Document List**

1 From the eSign Admin Manager window,

Click File > List Defined Documents.

Or

Click the List Defined Documents icon 🥯

Eile	Edit Extraction Fields Party	<u>View</u> <u>H</u> elp			
3	New > Coad Local Document		-	-	
0	List Defined Documents				
	Manage Attachments Import Defined Documents				
	Egit				

### 2 The Defined Documents List window appears.

D	efin	ed Documents List			×					
F	Ple	ase select the Documen	nt Type(s) you would like to open or export.							
١.										
		Short Name	Full Name	Description		Display	Archive	Electronic Vau	t AIM Defined	<b>^</b>
		Contains:	Contains: 5	Contains:	∀ Filte	er🔲 👘	🗸 Filter	🗸 Filter 🔲	⊽ Filter	V
	•	APPSUM1APPC	APPSUM1APPC	Application Summary						-
	1	APPSUM1APPD	APPSUM1APPD	Application Summary				Image: A start of the start	<ul> <li>Image: A set of the set of the</li></ul>	
	1	APPSUM2APPD	APPSUM2APPD	Application Summary		<b>V</b>		<b>~</b>	<b>v</b>	
	- 1	APPSUM2APPS	APPSUM2APPS	Application Summary			<b>V</b>		<b>v</b>	
	1	APPSUM4APPC	APPSUM4APPC	Application Summary		<b>V</b>			<b>v</b>	
	1	APPSUM4APPD	APPSUM4APPD	Application Summary		<b>V</b>			<b>v</b>	
		APPSUM6APPD	APPSUM6APPD	Application Summary		<b>V</b>	<b>V</b>	<b>V</b>	<b>V</b>	
	1	LNADDSTATC	LNADENDUMSTATICC_1APP	Loan Addendum (Static)			<b>V</b>			-
	۹.									•
			Delete Selected	Open Selected Export Selected Close						
_										
To	/tal: 1	15, Selected: 1								

- Column definitions are listed under the Extraction Details window on page 24.
- The top row in each column allows filtering the selection.
  - o Filters are data-specific (text or Boolean).
  - The default *text* filter selection, or constraint, is "Contains" and the default value is *empty*, which causes all rows to appear. The default *data* filter selection is "Equals", which filters based on the *icon* in the filter row.

Click the <u>filter icon</u> to choose a type of constraint. Click the constraint (Contains, Starts with, etc.) to enter text. Select one or more documents.

Click Delete Selected.

**3** The Confirm Delete text box appears.

### Click Yes.

The documents are deleted.

Confirm Delete	×
Are you sure you want to delete the selected documents?	
Yes No	

## **Delete by Deleting Extraction**

1 From an open document,

#### Click Extraction > Delete Extraction.

#### Or

Right-click on the **Document Type** and select **Delete**.

le <u>E</u> dit <mark>Egtracti</mark>	on Fields <u>P</u> arty	<u>Vinw</u> <u>H</u> elp				
3 💫 🔒	lit Extraction	2 2 2 2	• • • • • • • •	3		
APPSUM D	slete Extraction			18		
-Cu Decu	incel Extraction					
-IM Q	dering )				100001-c1	1
- Account_Nur - Customer_DC	nber DB		Application Sun	nmarv		1
				545357 S. A.		

**2** The Confirm Delete text box appears.

#### Click Yes.

Confirm	Delete	×
?	Are you sure you want to delete the whole document type definition "APPSUM1APPE" ?	
	Yes No	

**3** The page refreshes with all index and field information deleted.

Sign Admin Manager - APPSUM	#1APPE.pdf			- 0
File Edit Extraction Fields	Party Tools Yiew Help			
🔁 😋 🗋 🖓 🖓 🖂 🕫		D 2 2 2 1 D	NB	
			THE PARTY IS	
		Applica	tion Summary	ID0001-e1
	Index Fields	-		
	Customer Name	Member Number	Application Number	DOB
	John Smith	11223344	55554	03-23-1952
	Customer Number	Loan Number	SSN	Loan Purpose
	11223344	105	000.98-1234	Car Loan
	Member Name	Account Number	Date Started	Loan Amount
	Take Smith	123456.1	01/01/2018	23,999,00

# **Closing a Document**

Click File > Close File.

## **Managing Attached Documents**

An Attached Document is a *PDF document* not in the normal IMM eSign document system. This could be a scanned driver's license, passport, a written set of instructions, or any other document in *PDF format*.

No documents are created or used when they are defined. This is more like a type or category than an actual document. You can scan a passport and save it as a *PDF document* with any name. When the document is added into the document set, the Full Name and filename will be required information.

Refer to the User Guide for information on adding and using attached documents.

1 From the eSign Admin Manager screen,

#### Click File > Manage Attachments.


2 The Manage Attachments screen appears.

Existing Attached Document definitions are listed in the top.

Clicking a column title alternates between sorting ascending or descending.

The top row in each column allows filtering the selection. The default filter selection, or constraint, for Text fields is "*Contains*" and the default value is *empty*, which allows display of all rows. The default filter selection, or constraint, for checkbox fields is "*No filter*" and the default value is *empty*, which will display all rows. Click the filter icon to choose a type of constraint. Click the constraint (Contains, Starts with, etc.) to enter text.

Click **Close** to close the Manage Attachments screen.

nage Attac	hment	s		
achments f Name will	eature be us	e is used to add addit ed on the Attachmer	tional PDF documents to ts screen when the user	Saved Sessions. adds the
	Jave	1 3633013.	Filter Row	
Short	Name	Full Name	Description	Archive Doc
Contain	s:	✓ Contains:	☑ Contains:	🛛 Filte 🔲 🛛 🖓
DRIVER	SLICE.	DRIVERSLICENSE	Driver's License	
PASSPO	RT	PASSPORT	Passport	✓
PAYSTU	3	PAYSTUB	Paystub	✓
PHOTOI	D	PHOTOID	Photo ID Document	t 🔽
UTILITY	BILL	UTILITYBILL	Utility Bill	Image: A start of the start
	_		III	/ `
<u>D</u> elete				
ocument De	tails			
hort Name				
Full Name				
)escription				
	Arc	hive Documents		
		Eart Inde	XE2	
<u>A</u> dd		Save Cancel	Close	

# Add an Attach Document Definition

1 Click Add.

The Manage Attachments screen unlocks for editing.

		Full Name	Description	Archive D	oc
Contair	ns: ⊽C	ontains:	☑ Contains:	🛛 Filte 🔲	V
DRIVER	SLICE D	RIVERSLICENSE	Driver's License		
PASSPO	RT P	ASSPORT	Passport		
PAYSTU	IB P.	AYSTUB	Paystub	<b>~</b>	
РНОТО	ID P	HOTOID	Photo ID Docume	nt 🔽	
UTILIT	/BILL U	TILITYBILL	Utility Bill	<b>~</b>	
ort Name	etails				
Full Name					
Full Name					

#### 2 Enter information for

1 **Short Name**: Used in creating the filename for saved sessions. The Short Name is used for the Document Set Name on the Saved Session Details screen. (20 characters maximum)



Short Name and Full Name can only have A-Z, 1-9 and Underscore (\_). Spaces are not allowed.

- 2 Full Name: Used in creating the filename for archived documents. For attachments, the document name is more like a type or category than an actual name. You can scan a driver's license and save it as any file name. When the document is added into the document set, the Short Name and the filename will be required information. Used in creating the filename for archived documents. The Full Name is used in indexing and defaults to the current filename, but can be modified at this point. (100 characters maximum)
- 3 **Description**: An easy to recognize description of the document. (150 characters maximum)
- 4 Archive Document: When checked, the document will always be archived as soon as a session is complete. When not checked the document may still be optionally archived.
- 5 Action Buttons:
  - Click Save to save the changes and add the information to the list.
  - Click **Cancel** to clear the Document Details section with no changes saved.
  - Click **Close** after all definitions have been added.

SHOL	Name	Full Name	_	Description	A	rchive Do	C
Contain	s: โ	Contains:	V	Contains:	♥ Filt	e 🗖	V
DRIVER	SLICE	DRIVERSLICENSE		Driver's License		Image: A start of the start	
PASSPO	RT	PASSPORT		Passport		<b>~</b>	
PAYSTU	B	PAYSTUB		Paystub		Image: A start of the start	
	D	PHOTOID		Photo ID Document			
ocument De	etails						
ocument De nort Name	atails AUTOIN	ISURANCEAGREEME					
ocument De nort Name Full Name	etails AUTOIN AUTO_I	ISURANCEAGREEME NSURANCE_AGREEM	IENT				
ocument De nort Name Full Name escription	etails AUTOIN AUTO_I Auto Ins	ISURANCEAGREEME NSURANCE_AGREEM urance Agreement	IENT				

- **3** The Manage Attachments screen refreshes listing the attachment.
  - Edit Indexes: Clicking this button displays the Document Imaging Indexes screen. Refer to page 33 for more information. Only active when editing an existing attachment.



Only indexes which have Use For DMS checked at the FI Level will appear on the **Document Imaging Indexes** screen.

Repeat as necessary.

Click Close when done.

N	1an	age Attac	hments:					×
A Fi d	itac ull I ocu	chments f Name wil Iments to	feature i I be use Saved	s used to add a d on the Attachr Sessions.	dditional nents so	PDF documents to Sa treen when the user a	aved Sessions. Ids the	
	_	Short	Name	Full Nam	e	Description	Archive Doc	
		Contain	s: 🔻	Contains:	7	Contains:	🛛 Filte 🔲 🖓	
	Þ	AUTOIN	SURA	AUTO_INSURAN	ICE_A	Auto Insurance Agree		
		DRIVER	SLICE	DRIVERSLICENS	E E	Driver's License		
		PASSPO	RT	PASSPORT		Passport		
		PAYSTU	В	PAYSTUB		Paystub	<ul> <li>Image: A set of the set of the</li></ul>	
		PHOTOI	D	PHOTOID		Photo ID Document	<ul> <li>Image: A set of the set of the</li></ul>	
		UTILITY	BILL	UTILITYBILL		Utility Bill	Image: A state of the state	
	•		_					
		<u>D</u> elete						
			_					
	De	oumont De	ataila					
	00	cument De	tais					
	Sh	ort Name						
	_							-
	F	ull Name						
	De	escription						
		Comption		ue Documento				
			Archi	ve Documents				
				Edit I	ndexes	]		
6								
		<u>A</u> dd	5	ave Car	nce <u>l</u>	<u>C</u> lose		

## **Edit an Attach Document Definition**

1 Double-click an attachment row.

The Document Details unlock for editing.

Make changes as necessary.

Edit Indexes as necessary.

Click Save to save the changes and add the information to the list.

Click Cancel to clear the Document Details section with no changes saved.

## **Delete an Attach Document Definition**

1 Click a definition.

#### Click Delete.

Nort Name     Full Name     Description     Archive Doc       ntains:     V Contains:     V Contains:     V Filte       'OINSURA     AUTO INSURANCE A     Auto Insurance Agree     V       VVERSLICE     DRIVERSLICENSE     Driver's License     V       SSPORT     Passport     V     V       'STUB     PAYSTUB     Paystub     V       DTOID     PHOTOID     Photo ID Document     V       LITYBILL     UTILITYBILL     Utility Bill     V
Intains: Contains: Contains: Filte
ITOINSURA AUTO INSURANCE A Auto Insurance Agree V RIVERSLICE DRIVERSLICENSE Driver's License V ISSPORT PASSPORT Passport V ISSPORT PAYSTUB Paystub V HOTOID PHOTOID Photo ID Document V TILITYBILL UTILITYBILL Utility Bill V IIIII
QVERSLICE     DRIVERSLICENSE     DRIVERSLICENSE     DRIVERSLICENSE     V       SSPORT     PASSPORT     Passport     V       VSTUB     PAYSTUB     Paystub     V       IOTOID     PHOTOID     Photo ID Document     V       TILITYBILL     Utility Bill     V
SSPORI     Passport     V       YSTUB     PAYSTUB     Paystub     V       IOTOID     PHOTOID     Photo ID Document     V       TILITYBILL     Utility Bill     V
INTERPORT PAYSUD PAYSUD PAYSUD PAYSUD PHOTOID PHOTOID Photo ID Document PAYSUD Photo ID Document PAYSUD Photo ID Document PAYSUD Photo ID Document Photo ID
ILITYBILL UTILITYBILL Utility Bill
nent Details
Name
iption Archive Documents

2 Click **OK** on the Warning popup.

The definition is removed from the list.



# **Remote Attachment Template**

Remote Attachment Templates are groups of attachment definitions that can be associated with discrete processes (Car Loan, Home Loan, etc.)

Remote Attachment management is performed using IMM eSign RTS Administrator functions.

#### Click File > Remote Attachment Template.



This action will open IMM eSign RTS in a browser window.

eSign Admin Manager will remain open during this operation.

The Remote Attachment Template Maintenance page appears in your browser.

📓 Remote Attachment Template Maintenance			IMM eSign			
Search by Template Name:	٩					
Template Name	Description	Attachments	Save	Delete		
1	Add Description					
Car Loan	Car Loan Attachment Template	Image: A set of the		1		
Home Loan	Home Loan Attachment Template	Image: A start of the start		1		

Refer to the Administrator Guide for an explanation of this page.

# **Exporting and Importing Defined Documents**

Exporting/Importing defined documents is a two-part process. Exporting/Importing the *Defined Document List* and *Exporting/Importing the Defined Documents* are separate processes. Both processes are explained. *Exporting/Importing* the documents are necessary if changes will be made by the receiving Financial Institution.

!	1.	Fonts used for <i>text fields</i> (Defining Text Fields, page 36) are dependent on fonts installed on the <i>server</i> . A document exception during processing may occur if the document is defined and imported on a server that does not have the same font available.
	2.	Attachments cannot be exported or imported.

## **Defined Document List on the AIM Administrator Machine**

Defined Document List databases are stored on the server for each Financial Institution, making it possible to use copies of a single or master Defined Document List database on multiple Financial Institutions.

## **Export List**

1 From the TotaleSign Admin Index Manager window.

Change Financial Institution as necessary to select the source FI (Starting Admin Index Manager, page 7).

### Click File > List Defined Documents.

Or

Click the List Defined Documents icon 5



#### 2 The Defined Documents List window appears.

De	fined Documents List			×					
Р	lease select the Doc	ument Type(s) you would like to open	or export.						
	Short Name	Full Name	Description		Display	Archive	Electronic Va	ult AIM Defined	1
	Contains:		☑ Contains:	⊽ Filt	er🔲	🛛 Filter 🔲	🛛 Filter 🔲	⊽ Filter	7
	APPSUM1APPC	APPSUM1APPC	Application Summary					Image: A start and a start	
	APPSUM1APPD	APPSUM1APPD	Application Summary				<b>~</b>	<b>~</b>	
	APPSUM2APPD	APPSUM2APPD	Application Summary		<b>v</b>	<b>V</b>	<b>V</b>	<b>~</b>	
	APPSUM2APPS	APPSUM2APPS	Application Summary			<b>V</b>		<b>~</b>	
	APPSUM4APPC	APPSUM4APPC	Application Summary		<b>V</b>	<b>V</b>		<b>v</b>	
	APPSUM4APPD	APPSUM4APPD	Application Summary		<b>V</b>	<b>V</b>		<b>v</b>	
	APPSUM6APPD	APPSUM6APPD	Application Summary		<b>V</b>	<b>V</b>	Image: A start and a start	×	
	LNADDSTATC	LNADENDUMSTATICC_1APP	Loan Addendum (Static)			<b>V</b>			-
•	(							)	÷
		Delet	e Selected Open Selected Export Selected	<u>C</u> lose					
Tot	al: 15, Selected: 1			.:					

- Column definitions are listed under the Extraction Details window on page 24.
- The top row in each column allows filtering the selection.
  - Filters are data-specific (text or Boolean).
  - The default *text* filter selection, or constraint, is "Contains" and the default value is *empty*, which causes all rows to appear. The default *data* filter selection is "Equals", which filters based on the *icon* in the filter row.

Click the <u>filter icon</u> to choose a type of constraint. Click the constraint (Contains, Starts with, etc.) to enter text.

Select the document(s) to be exported.

Click Export Selected.

**3** The Save As window appears.

The default location is

InstallPath%\Admin\IndexFiles.

**4** Navigate to a target folder.

Enter a File Name.



The list will be exported in .*Zip* format.

5 The Successfully Exported X items message appears.

#### Click OK.

The list is exported and you return to the TotaleSign Admin Index Manager window.



×
Successfully Exported 9 items.
ОК

### **Import List**



Documents included in Defined Document Lists created in prior versions of TeSign Admin Index Manager can be imported into TeSign Admin Index Manager 2019.2 SP1.

**1** From the eSign Admin Manager window.

Change Financial Institution as necessary (Starting Admin Index Manager, page 7).

Click File > Import Defined Documents.

-	Sign Admin Manager			-	×
Ele	Edit Extraction Fields	Tools Yiew Help			
	New	8.8.0000	1		
10	Load Local Document				
9	List Defined Documents				
	Manage Attachments				
1	Remote Attachment Template				
1	(mport Defined Documents				
	Egit				

**2** The Open window appears.

Navigate to the location where the Zip file is stored.

Select the Zip file.

Click Open.

The Import Defined Documents window appears.
 Column definitions are listed under the Extraction Details window on page 24.
 By default, all documents are selected.
 Select any or all documents to be imported.

#### Click Import Selected.

lm	nport Defined Documents								
8	Selected Document Typ	pes will be imported. (By default all of	the DocumentTypes have been selected.)						
	Short Name	Full Name	Description		Display	Archive	Electronic Vaul	t AIM Defined	<b>^</b>
	Contains:			⊽ Filt	er🔲	🗸 Filter 🔲	🗸 Filter 🔲	🛛 Filter 🔲	V
	APPSUM1APPC	APPSUM1APPC	Application Summary					<b>V</b>	=
	APPSUM1APPD	APPSUM1APPD	Application Summary						
	APPSUM2APPD	APPSUM2APPD	Application Summary		<b>v</b>	Image: A start and a start		Image: A start of the start	
	APPSUM2APPS	APPSUM2APPS	Application Summary			Image: A start of the start		Image: A start of the start	
	APPSUM4APPC	APPSUM4APPC	Application Summary		<b>v</b>	Image: A start of the start		Image: A state of the state	
	APPSUM4APPD	APPSUM4APPD	Application Summary		<b>v</b>	Image: A start of the start		Image: A state of the state	
	APPSUM6APPD	APPSUM6APPD	Application Summary		<b>v</b>			Image: A start of the start	
	LNADDSTATC	LNADENDUMSTATICC_1APP	Loan Addendum (Static)			Image: A start of the start		Image: A start of the start	-
	4								•
			Import Selected	Close					
			· · · · · · · · · · · · · · · · · · ·		-				
Tot	tal: 15, Selected: 15			.:					

**4** The Successfully Imported X items message appears.

Click OK.

The list is imported and you return to the TotaleSign Admin Index Manager window.



This procedure only imports document definitions. The associated PDF files are not imported and must be done separately.

		×
Successfully Impo	uted Q items	
Successionly impo	ficed 5 feetins.	
	ОК	

## **Defined Documents on the Server**

## **Export Documents**

- 1 On the *server*, navigate to C:\IMM\TeAASPFiles\FI#\SourcePDFs.
  - Each FI (FI#) stores its own documents in the SourcePDFs folder.

Select the PDF files to be exported.

Right-click and select **Send To > Compressed (zipped) Folder**.

📕 📓 = CAMMATEAASPEASAEQSourcePD		
File         Home         Totale         West           Image: State         Image: State         Image: State         Image: State         Image: State           Image: State         Image	Cay Colds Sumary Day Character *	
Childrend	Druanze New Open Schol	
← ····································	MM4 + TEAASIFFiles + FI2 + Source/OFs	a B Search SourcePCEs D
MM GA2P LIAMPrice EMStantony Propipal III TO Addhes Active	Name     Determente     Determente     Ses     Ses     Commente     Ses     Ses     Ses     Commente     Ses     Ses     Ses     Commente     Ses     Ses     Commente     Ses     Ses     Ses     Commente     Ses     S	Autom Almbot. A A A A A A A A A A
AnthonEther Eron Film Film Film Film Steep Scence/Efs	TELONIURCUM Copy Contractor Sector Se	A A A

**2** Rename, copy and distribute the .zip file as necessary.

### **Import Documents**

1 On the *server*, navigate to the folder containing the compressed folder (.zip file). Right-click on the file and select **Extract All**.



**2** The Select a Destination and Extract Files popup appears.

Use the Browse button to select an extraction location on the server (Default Location:

C:\IMM\TeAASPFiles\FI#\SourcePDFs,

Where FI# is the FI Number associated with your Financial Institution).

Click Extract.

Extract Compressed (Zipped) Folders	
Select a Destination and Extract Files	
Files will be extracted to this folder:	
C:\IMM\TEAASPFiles\Fl2\SourcePDFs	Browse
	Extract Cancel

## **Imported Documents Permissions**

### 1 On the server,

Navigate to the SourcePDFs folder (Default Location:

C:\IMM\TeAASPFiles\FI#\SourcePDFs,

Where FI# is the FI Number associated with your Financial Institution).

Right-click on the folder name and

Select **Properties** from the menu.

📙    🛃 📕 🗢    C:\IMM\TEAASPFiles\Fl2\Sourcel	PDFs	
File Home Share View		
Pin to Quick Copy Path Res Paste shortcut Clipboard	love Copy o ~ tory Organize Organize New	Properties •
← → × ↑ → This PC → Local Disk (C:)	) > IMM > TEAASPFiles > FI2 > SourcePDFs >	•
<ul> <li>FI2</li> <li>AddOns</li> <li>Archive</li> <li>ArchiveOther</li> <li>Error</li> <li>FDFs</li> </ul>	<ul> <li>Name</li> <li>▲ APPSUM1APPC.pdf</li> <li>▲ APPSUM1APPD.pdf</li> <li>▲ APPSUM2APPD.pdf</li> <li>▲ APPSUM2APPS.pdf</li> <li>▲ APPSUM4APPC.pdf</li> <li>▲ APPSUM4APPD.pdf</li> </ul>	Date modifie 3/17/2016 11 3/18/2016 10 3/18/2016 9:5 2/4/2016 1:56 3/17/2016 10 3/18/2016 8:4
→ Help → Images → SourcePDFs	APPSUM6APPD.pdf     MMeAtlasRedirect.pdf	4/26/2016 10 4/28/2016 12
SampleCompressedPdfFiles.zip TeAWebArchive Logs TeAWebArchive Temp Uploads Utilities TeAASPFileUploadSvc inetpub Logs PerfLogs Program Files Program Files (x86) ProgramData Recovery	Collapse     P.pdf	5/11/2016 8:4 2/4/2016 2:2 2/4/2016 3:00 6/13/2017 9: 2/4/2016 2:12

- **2** The SourcePDFs Properties window appears.
  - 1 Select the **Security** tab.
  - 2 Click Advanced.

SourcePDFs Properties ×
General Sharir Security Previous Versions Customize
Object name: C:\IMM\TEAASPFiles\FI2\SourcePDFs
Group or user names:
SECREATOR OWNER
SYSTEM
RETWORK SERVICE
IMMI lear (IMMV/MRKS2016/I/IMMI lear)
To change permissions, click Edit. Edit
Permissions for CREATOR OWNER Allow Deny
Full control
Modify
Read & execute
List folder contents
Read
Write 🗸
For special permissions or advanced settings, 2 Advanced click Advanced.
OK Cancel Apply

- **3** The Advanced Security Settings for SourcePDFs window appears.
  - 1 Check the checkbox for Replace all child object permissions with inheritable permissions from this object.
  - 2 Click OK.

	C:\IIVIIVI\TEAASPFIles\FI2\S0	urcePDFs			
Owner:	IMMUser (IMMVMRKS20164)	(IMMUser) 😽 Chang	e		
Permissions	Auditing Effective A	ccess			
Permission er Type	Principal	Access	Inherited from	Applies to	^
Allow	NETWORK SERVICE	Full control	None	This folder, subfolders and files	
Allow	Administrator	Full control	C:\IMM\TEAASPFiles\	This folder, subfolders and files	
Allow 🎎	NETWORK SERVICE	Full control	C:\IMM\TEAASPFiles\	This folder, subfolders and files	
Allow	IMMUser (IMMVMRKS20164I	Full control	C:\IMM\TEAASPFiles\	This folder, subfolders and files	
🚨 Allow	SYSTEM	Full control	C:\	This folder, subfolders and files	
🚨 Allow	Administrators (IMMVMRKS2	Full control	C:\	This folder, subfolders and files	
🚨 Allow	Users (IMMVMRKS20164I\Us	Read & execute	C:\	This folder, subfolders and files	
St Allow	Licere (IMM\/MRKS20164I\Lic	Special	<u>C\</u>	This folder and subfolders	~
Add	Remove View				

4 The Windows Security window appears.

#### Click Yes.

Windows	Security	×
	This will replace explicitly defined permissions on all descendants of this object with inheritable permissions from SourcePDFs. Do you wish to continue?	
	Yes No	

5 Click OK, OK.

Close all open windows.

### **ProSign Documents** (Only available if the TeSign Zip Files Add-On is activated.)



If you switch from an FI that does not have .zip files to an FI that uses .zip files, you must restart TotaleSign Admin Index Manager.

All documents from the .zip files must be defined as described in this guide.

To prepare for extracting files:

- **1** Create a temporary folder (Ex. C:\Program Files\IMM\TotaleSign\Admin\Temp).
- 2 To assist in identifying new extracted PDF documents to be defined, you can create a folder C:\Program Files\IMM\TotaleSign\Index Files\Base Documents and move all currently-defined documents from C:\Program Files\IMM\TotaleSign\Index Files to the new folder.

Copying the .zip folders into C:\Program Files\IMM\TotaleSign\Index Files will help in the following steps.

**3** After the TeSign Zip add-on is activated and the password has been entered, a new menu choice appears in AIM: Tools.

<b>[</b> ] es	Sign Adı	min Manager							
<u>F</u> ile	<u>E</u> dit	E <u>x</u> traction	F <u>i</u> elds	<u>P</u> arty	Tools	<u>V</u> iew	<u>H</u> elp		
: 🤌	<b>\$</b>				2	윤 (		Ы	1

4 Click Tools > Zip Files > ProSign.



- **5** The Select a Zip file to Extract From screen appears.
  - 1 Browse to the .zip file location.
  - 2 Click Open.

3 Open								
- 🗉 - 🛧 🧾 > This PC > Local Disk (C) > Program Files (all6) > IMM > TotaleSign > Admin > IndesFiles >				¥ 6	Search Ind	erFiles		p
Organize - Newfolder						.01	- 🗆	
> G Common Files * Name	Date modified	Type	Size					
> BMC Captiva	3/18/2016 12:17 PM	File folder						
> Google Vour Zip Files	3/18/2016 12:16 PM	File folder						
* <u> </u> BMM								
V 🦲 TotaleSign								
🛩 📙 Admin								
Applog								
) MMVituaPrinter								
V 📙 IndesFiles								
> 🧾 Base Documents								
> 📙 Your Zip Files								
> POFLibrary								
> Resource								
Temp								
ZipFiles								
) Clent								
> InstallShield Installation Information								
Finitemet Explorer								
Microsoft LifeCam								
i maa aana a cana 🖤								
File name:				~	_	_		
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- 7 The embedded PDF documents will be extracted to the default document location (Default: *C:\Program Files\IMM\TotaleSign\Admin\IndexFiles*).
- **8** Define all documents as described in this guide.

# **Contact IMM Support**

Feel free to contact us with any issues or concerns.

Phone: 800.836.4750 Option 3 (8:30am - 10:30pm ET) Fax: 908.862.6446 Email: support@immonline.com

IMM esign

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