IMM eSign Cloud for Loandesk

Implementation Guide

IMM
The eSignature Company

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Introduction

Welcome to the IMM eSign family. We appreciate your confidence in our company and our eSignature & Digital Transaction solutions. We look forward to working with you to power the digital strategies and initiatives you have established for your institution.

The eSign solution replaces your existing Jetform document solution. Fiserv will sunset its Jetform document support by December of 2019. The migration process to eSign should be well-planned so that all shared responsibilities are allocated in the best manner possible.

This guide provides an overview of the project flow. It includes key milestones and anticipated timeframes for each stage. It also explains key aspects of eSign implementation, eSign documents, frequently asked questions.

IMM eSignature and Digital Transaction products are not plug and play; our implementation is a collaborative project. The information in this guide will aid you in allocating the required FI resources for the project and will provide insight into what lies ahead as you move toward your Go-Live date.

Going live with eSign involves collaboration between the institution, core and loan operating systems, Imaging system, document/forms provider, and IMM. Let's plan the implementation together so we can Go-Live soon using IMM eSignature & Digital Transaction solutions.

We encourage you to read this implementation guide before the kick-off call, especially the Official Kick-Off Call section.

If you have any questions as you work through the implementation, please do not hesitate to contact your IMM Implementation Project Manager.

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Project Benchmarks

Here are the project benchmarks and their associated tasks. The project manager will explain these steps in detail during the first official kick-off call for eSign implementation. After that, the project manager will conduct frequent project management calls to ensure each stage is implemented smoothly as the Go-Live date approaches.

1st Stage:

1. Installation Preparation
2. Document Preparation

2nd Stage:

1. Configuration of your Cloud Financial Institution (FI)
2. Document Design and Field Mapping
3. End-to-End Testing
4. Administration and End-User Webinar Training Sessions
5. Document Testing and Revision
6. Workstation Deployment for eSign Users

3rd Stage:

1. Customer Acceptance Testing (CAT)
2. Pre "Go-Live" Check
3. Official "Go-Live" Date

Official Kick-Off Call

On the kick-off call, the IMM project manager will explain all project benchmarks with special focus on the first stage because these tasks are critical to proceeding with the project. The project manager will also review the completed "Customer Profile" to gather Information about the financial institution's technical environment and have a preliminary discussion about document design.

Kick-off Call Prerequisites

To ensure a productive kick-off call, the FI should share all prerequisites with IMM one week before the scheduled call. If there are questions about the prerequisites, email them to the project manager immediately.

Kick-off Call Agenda

Project Key Points

- IMM eSign requires LoanDesk version 4.6.5 or higher. If the FI is running a lower version, they must contact their Fiserv Client Partner, who will assist in upgrading Loandesk. Be aware that Fiserv may bill the FI for the Loandesk upgrade.

- During the eSign document testing phase, the FI will have to toggle between two document solutions - Jetform and IMM eSign -- so the allocation of time and resources will become very important. This toggling will continue until the FI goes live with eSign documents. After the eSign Go-Live date, all Jetform documents will have been fully implemented into eSign.

- The implementation includes three main stages. The project manager will first focus on the details of Stage 1.

Project Management Calls until the FI Goes Live with eSign

- The IMM Project Manager will schedule and conduct weekly status calls to ensure the project is on target for all applicable parties -- the institution, core and loan operating systems, imaging system, and document/forms provider – as well as IMM.

- In the email recap of every status call, the project manager will share the Project Timeline Table, which lists each task, assignee, due date, and status.

- Missing the project calls or scheduled engagements will impact the project's timeline. These are tight timelines because the JetForm conversion impacts all Fiserv FIs using Loandesk. FI resources must be available to keep the project on track.

Training and Implementation Materials

- The project manager will share all materials related to implementation and training.
- The project manager will schedule a Webinar Training Session for multiple credit unions.

Going Live with eSign

- IMM is implementing eSign for many Fiserv LoanDesk customers, so to make the process go smoothly, each FI will be assigned a specific month to Go-Live using eSign.

- Once the FI has been assigned a month on the "IMM-Fiserv eSign Calendar," the project manager will determine a specific Go-Live date.

- If the FI decides to change their Go-Live date after it has been established, they will be placed in a queue, and it may take additional time to reschedule the "Go-Live" date. If any additional training is required due to the change, the project manager will create a statement of work.

Detailed Outline of the Project Benchmarks

1st Stage:

Installation Preparation

FI Completes the Prerequisites for Kick-Off Call

The FI should complete the following tasks one week before the kick-off call to ensure a productive call.

1. Complete the "Customer Profile" with the IMM Sales Representative.
2. Submit a color logo file for the FI (60 pixels high x 200 pixels wide) to brand your Adobe Sign portal.
3. Fill out the "Initial Document List" spreadsheet provided by your IMM Client Success Manager within ten days of signing the eSign order.
4. Take a screenshot of the "net config workstation" so IMM can sync eSign to your Azure account. See Creation of the Azure Account for detailed information.
5. Begin thinking about the search elements necessary for your imaging system; these must be shared with IMM before End-to-End Testing.

FI Completes the Purchase of the In-Person Signing Devices

Type/Keyboard: The preferred in-person signing option is the Type or Keyboard method as there are no additional costs involved, no hardware to support, and no client components are required to be installed on the workstation. Another consideration is when IMM pushes out an upgrade to the eSign Cloud server the workstations will not require any updates.

Be aware that signature pads and tablets require additional components to be installed and configured on each workstation. If you prefer to use the signature pads or tablets, the in-person devices can be purchased and introduced to eSign at a later time. However if you intend to use the devices immediately, the FI must select an in-person signing device within one week of the official kick-off call. This device should be selected based on the FI's business needs. The FI and IMM AdminOps representative will work together to ensure that the selected signing device arrives at the FI before End-to-End Testing.

For a list of compatible devices, download the most current hardware order form from the IMM website; then click on "Order Forms," and then "In-Person Signature Device Order Form."

IMPORTANT: In-Person signatures can be captured using two different methods which will impact the FI's selection of the in-person signing devices.

Topaz Signature Pads: eSign creates the new document session from LoanDesk within the RDP session of the thin client environment. After creating and saving the eSign session, a user can launch eSign (via pre-saved link on each workstation using Internet Explorer) and allow the member to complete the signing ceremony on their local workstation **(outside of the RDP session)** using the Topaz Signature Pad.

GemView or Wacom Tablets: eSign creates the new document session from LoanDesk within the RDP session of the thin client environment. After creating and saving the eSign session, a user can launch eSign on their workstation, then the user can drag and drop the eSign window on the tablet screen which allows the member to complete the signing ceremony on the tablet**.**

iPads: eSign creates the new document session from LoanDesk within the RDP session of the thin client environment. After creating and saving the eSign session on the thin client environment, a user can launch eSign on the iPad by logging in using their secure credentials and allow the member to complete the signing ceremony**.**

If the FI opts to complete the in-person signing ceremony using an iPad, the FI must have a secure Wi-Fi setup within their institution.

FI Prepares a Dedicated Machine for Downloading eSign Documents

The FI must prepare a dedicated machine for downloading eSign documents so they can be imported to the imaging system; if there is no imaging system, documents can be stored on this machine. This machine can be a server or a dedicated workstation.

- The dedicated workstation may never be turned off because documents will be downloading on the machine overnight.
- The IMM Installer will install the DMS Client Utility and will schedule the overnight download of eSign documents.

FI Assigns eSign Roles and Responsibilities

The FI should review the following guidelines for administrator and user accounts so that the FI can allocate resources appropriately. Ensure that the creation and deletion of these accounts are part of your onboarding and termination procedures.

IMM strongly recommends that the FI create and securely save a list of roles and resources to be used in the event of employee turnover, specifically the administrators. If IMM's assistance is required afterward, a statement of work will be created.

FI Roles to Be Assigned

Microsoft Azure allows users to connect to eSign through the IMM Cloud securely.
The FI's **Microsoft Azure Administrator** can add and delete accounts in the Microsoft Azure portal.

IMM eSign XML is a robust, browser-based document presentation application.
The FI's **eSign Administrator** can manage eSign settings and documents. For eSign Remote, **eSign Administrator** can add email IDs for all eSign users, and manage users who securely connect to Adobe Sign. The FI's **eSign Users** are automatically created within eSign using their windows login name when a new session is created, so a user's Windows login name and eSign user name are identical.

Adobe Sign is used to complete a secure remote-signing ceremony.
The FI's **Adobe Sign Administrator** can manage functionalities and can add and delete accounts.

Create and Sync Your Azure Account

The FI must provide IMM with a screenshot of the "net config workstation" so that the installer can sync eSign to your Azure account. To capture this screenshot:
1. Launch the Windows Command prompt.
2. Click "Start," then type "net config workstation."
3. Take a screenshot to be shared with IMM

If your FI does not have an Azure account, IMM will create it.

Before creating, IMM would like to verify that your FI has an Azure account or not:
1. Launch https://portal.azure.com/
2. Enter your "email address" OR If your email address appears within the "Pick an account" window, select the email address and enter your windows password.
3. Let your project manager know that your FI was able to successfully log in to the Azure portal so we can use your existing Azure account.

Documents Preparation

FI Completes Collection of All Documents

The FI must complete the Initial Documents List spreadsheet provided by your IMM Client Success Manager within ten days of signing the eSign order. Delays in the completion of this spreadsheet will impact the project timeline.

For detailed information about collecting the document inventory, see the section eSign Document Collection, Creation, and Maintenance.

FI Reviews and Sign the Document Proposal

If you have any questions about collecting documents or completing the spreadsheet, contact Andrea LaPlaca from IMM's AdminOps department. Andrea can be reached by telephone at (800) 836-4750, extension 133 or by email at Andreae@immonline.com. When emailing Andrea, ensure that you also add her department email AdminOps@immonline.com.

Upon receiving the completed spreadsheet, Andrea will create a proposal for all documents in the "Initial Document List." She will email the proposal to the FI for review.

The FI must review and sign the proposal promptly so that IMM can begin the document work and ensure completion before the End-to-End Testing date. If the proposal is not signed on time, this will impact your timeline.

Once the FI signs the document proposal, the project manager will schedule a call between the FI and IMM document designer to collect specific field mapping information. For more details, see the section eSign Documents Mapping Questionnaire

2nd Stage:

Installer Completes Configuration of Your Cloud FI

The IMM Installer will complete the following tasks using the Customer Profile:

1. Create the Azure account (if applicable)

2. Create the FI on the IMM Cloud and sync eSign to FI's Azure account

3. Create and brand Adobe Sign (applicable only if the FI has purchased eSign Remote)

4. Ensure that the "FISpecificXSL" is placed on the FI's Cloud folder.

5. The project manager or installer will email "eSign Credentials" to Fiserv so they can be entered before end-to-end testing.

eSign Documents Field Mapping

IMM and FI Complete eSign Documents Mapping Questionnaire

- The project manager will schedule an engagement so the IMM designer can collect the answers for questions listed on the "eSign Documents Mapping Questionnaire" These questions are related to best practices for using Loandesk and the FI's specific values for Loandesk, such as specific insurance codes or loan type codes. Using the answers, the designer will be able to map each eSign document.

- If the FI has more information about field mapping than is covered in the questionnaire, share this information with IMM so that the designer can map all fields accurately.

IMM Designer Completes eSign Documents

The IMM designer will begin designing and mapping all documents listed on the proposal.

- IMM aims to complete all documents before the scheduled engagement of "end-to-end testing." If IMM is unable to complete all documents by that date, they will schedule batch deliveries.

- The IMM designer and project manager will determine the "Expected Documents Completion Date" and will share this information with the FI.

- The project manager will schedule engagement of "end-to-end testing" after the "Expected Documents Completion Date."

End-to-End Testing – Loandesk to eSign to Imaging System

End-To-End Testing will be completed over two separate engagements.

Note: To conduct End-to-End Testing, the installer will switch document printing from "Jetform" to "IMMForm." The FI will toggle document printing from "IMMForm" to "Jetform" once the engagement is completed.

For step-by-step instructions on how to toggle between "Jetform" and "IMMForm," see How to toggle documents integration between Jetform or eSign documents.

Engagement 1

The FI and the IMM Installer will perform the following tasks to ensure connectivity between Loandesk, eSign, and the imaging system.

1. Login to eSign

- The installer will log in to eSign from a workstation through your Azure account. This is outside of the RDP session of the thin client environment.

- For easy use, the Installer will save the eSign login link on the desktop or as a favorite link in Internet Explorer.

- The FI should save the "Financial Institution (FI) ID" in a safe and secure location.

2. Upload Documents and Check Descriptions.txt into eSign

- The Installer will upload eSign documents. For step-by-step instructions related to uploading documents, see How to Upload eSign Documents.
- The installer will check-in "Descriptions.txt," a field mapping reference file which stores your FI-specific values. For more information about the descriptions.txt file and step-by-step instructions for check-in, see Mapping Reference file - Descriptions.txt.

3. Configuration of Index Fields

- The FI should share all of the required indexes with the Installer.
- The installer will configure the required index fields according to your imaging system.

4. Installation/Configuration of the Client Components and In-Person Signing Device

- The installer will install the in-person signing device and required plug-ins (if applicable).

- The technical resource for the FI must use this opportunity to train themselves as they will be required to install the remainder of the client components and in-person signing devices on all users' workstations.

- **Note:** Signature Pads require Client components to be installed on the workstations that will be used to sign eSign Documents.

5. Perform a Test Transaction to Test End-to-End Connectivity

- The FI will launch eSign from Loandesk from any existing Loan Application.

- The installer will process two to three documents into eSign.

- The FI will sign documents using a blended signature where one applicant signs in-person with the desired signing device and a second applicant signs remotely.

- The FI and installer will confirm that all index fields are auto-populated in preparation for importing to your imaging system.

6. Installation of DMS Utility to download eSign documents:

- The installer will install the DMS client utility to download eSign documents on a dedicated workstation or server as required.

- The installer will schedule all eSign documents for overnight download.

Engagement 2

The Installer and FI must have another engagement to ensure that the processed eSign documents are downloaded and moved to your Imaging system.

7. Import eSign Documents into the Imaging System

- Once the eSign documents have been downloaded, the Installer will configure eSign within the Imaging System Settings so that the documents are moved from the dedicated workstation/server to the imaging system.

- The FI will search for eSign documents in the imaging system to ensure they are imported.

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Administration and End-User Webinar Training

The FI is required to view training videos before the scheduled webinar for eSign End-User and Administration Training. If the FI views the video in advance, the FI and IMM trainer can have a productive Q&A session during the scheduled webinar event.

The project manager will offer webinar dates during the project status call. The FI is required to register for the webinar.

To view the training videos:

- IMM eSign Cloud Azure Training Video

    https://www.immonline.com/portfolio-posts/imm-esign-cloud-azure-training-video/

- IMM eSign Remote Administration Training

    https://www.immonline.com/portfolio-posts/esign-remote-administration-training/

- IMM eSign 2018 Cloud XML Admin Training: Documents Maintenance, Document Sets

    https://www.immonline.com/portfolio-posts/imm-esign-2018-cloud-xml-admin-training-documents-maintenance-document-sets/

- IMM eSign 2018 Cloud XML Admin Training: eSignature Settings, Remote Attachment Template

    https://www.immonline.com/portfolio-posts/imm-esign-2018-cloud-xml-admin-training-esignature-settings-remote-attachment-template/

- IMM eSign 2018 Cloud XML Admin Training: General Settings

    https://www.immonline.com/portfolio-posts/imm-esign-2018-cloud-xml-admin-training-general-settings/

- IMM eSign 2018 Cloud XML Admin Training: Users Maintenance Search Reporting

    https://www.immonline.com/portfolio-posts/imm-esign-2018-cloud-xml-admin-training-users-maintenance-search-reporting/

- IMM eSign 2018 Cloud XML: End User Training

    https://www.immonline.com/portfolio-posts/imm-esign-2018-cloud-xml-end-user-training/

End-User Training Agenda

1. How to toggle document printing between Jetform and IMM

2. How to create/save a "New Session" within eSign from LoanDesk and process documents

3. Quick Introduction to eSign Documents' Mapping – Host vs. Generic Fields – Default Locking Behavior

4. How to sign using different methods

    - in-person using signing device

    - Remotely via Adobe's site

    - Using Blended Signatures -- using both methods within one session

5. How to attach various types of attachments to the document session

6. The ideal location within eSign to Print Documents

7. How to retrieve a saved session within eSign

8. How to archive a session signed in-person vs. remotely

9. eSign functions and features that will not work within the RDP session of the thin client environment

Admin Training Agenda

1. A quick introduction to Azure and eSign Roles and Responsibilities

2. Key points of Adobe portal – the creation of users and maintenance

3. Documents Maintenance (XML) – Introduction to "Keep Unlocked" fields and the "Recurring Type" (Your IMM designer will share the appropriate recurring type)

4. FI's responsibility to upload + check-in Descriptions.txt

   - How to upload eSign documents

   - How to check-in the mapping reference files - Descriptions.txt

5. How to create Documents Sets and link them to Loan Type Descriptions.

6. How to add 3rd party vendor "Attachment" and regular "Attachment" type

7. How to report error to IMM Support – "Error code"

8. How to schedule the DMS Client Utility to download eSign documents from eSign

9. How to ensure that downloaded documents are imported into your imaging system

FI Completes Documents Testing

This phase should start after the "Administration and End-User Webinar Training" session, so the FI has acquired enough knowledge of how to use eSign.

- The Project Manager will allocate 1, 2, or 3 weeks for the FI to complete documents testing, depending on the #of documents or resources available at the FI.

- The FI must allocate time and resources to test all field mapping on all eSign documents. Note, that the FI must be able to toggle between Jetform and eSign documents to complete testing; for that reason, the time allocation is decided by the FI.

- The FI is required to email the testing feedback results to the IMM designer and copy the IMM project manager.

- If required, the project manager will schedule "Document Testing Feedback" call with your IMM designer and the document testers at the FI. The FI's eSign Administrator must also be present on the call.

FI Completes eSign Users' Workstation Deployment

- The Installer has instructed the FI on the installation steps for client components during the end-to-end testing.

- The FI should ensure the installation of the client components for the eSign product, which includes the software and the hardware.

3rd Stage:

Customer Acceptance Testing (CAT)

- This stage of testing occurs after IMM has certified the system and provided training to the FI.
- Once training has been completed, the FI will perform Acceptance Testing to ensure that all aspects of the system are working as designed and ready to Go-Live.
- The Acceptance Testing matrix is required to be completed and returned to your project manager at least two weeks before the live date. If there are any issues, the FI should contact the project manager to ensure we address these reported issues in advance.

Note: If the FI has multiple models of signature pads, ensure each that model is certified thoroughly during the testing cycle.

Pre "Go-Live" Check

- The Installer will connect with the FI's IT representative to purge all test transactions for a clean eSign environment one your Go-Live date.
- This engagement should be scheduled one week before your Go-Live date.

Official "Go-Live" Date

- On your Go-Live date, you will have dedicated support from your IMM installer to help ensure a smooth transition to your live status.
- Once you Go-Live, you have full access to IMM Support on an ongoing basis. We will transition and introduce our support center procedures and contacts.

eSign Document Collection, Creation and Maintenance

Creating the Initial Document List

IMM has shared a copy of the Excel spreadsheet "Initial Documents List eSign XML." The FI should enter their document inventory in this spreadsheet. Each document should be categorized as follows and designated as Priority 1 or 2.

Jetform Documents Processed in Loandesk

This list includes all JetForm documents and notices (example: Adverse Action) printed from Loandesk. When listing these documents on the spreadsheet, mark it as Priority 1. The column "eSign Launching Point" must be updated to "Loandesk (eSign XML)."

Documents Completed Outside of Loandesk

The FI may have other documents to complete business transactions related to loan or account management. These may be saved in different file formats, such as fillable Adobe PDFs or Microsoft Word documents.

These documents can be processed in eSign so that the users can access all documents from one location. Users will be able to manually complete data as required, sign, and import them to an imaging system.

When listing these documents on the spreadsheet, mark it as Priority 2. The column "eSign Launching Point" must be updated to "Fill From Screen (eSign XML)"

Documents Processed via eSign RTS

If the FI has purchased eSign RTS, mark the column "eSign Launching Point" as "Print to eSign Printer (eSign Printer)" for each applicable document.

Important: There are two columns to list document names – "Document Name" and "eSign PDF File Name." Update the "eSign PDF File Name" with an appropriate name for the PDF file that will be uploaded to eSign. This name can be up to 50 characters (including .pdf extension) and should not contain any special characters except dashes (-).

Document Type – Copyrighted or Proprietary

The document inventory list may include copyrighted documents, proprietary documents, or both.

Copyrighted documents are created and maintained by a third-party vendor; the FI purchases a license to use the copyrighted documents. Document vendors include CUNA Mutual, Oak Tree, Conmar, and others.

Proprietary documents are created and maintained by the FI.
For both types of documents, the preferred file formats are Adobe fillable PDF (recommended), Microsoft Word documents, or Jetform IFDs.

Ensure that IMM has the latest source files for all documents in the inventory.
Ensure that IMM has the latest version of the FI's logo file and any other information that the documents require.

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Collecting the Latest Source Files for Copyrighted Documents

The FI, AdminOps, and your third-party document vendor must collaborate to make a list of all documents in use and continue to update the spreadsheet.

If the FI's third-party document vendor is other than CUNA Mutual:

- The FI must send an introduction email to their third-party documents vendor and introduce them to the Jetform Conversion project.

- Make them aware that IMM will be mapping all documents and that the latest source files must be emailed to AdminOps@immonline.com.

- The FI should copy AdminOps@immonline.com when sending the introduction email.

If the FI's third-party documents vendor is CUNA mutual:

- AdminOps will email CUNA and copy the FI requesting all document in use by the FI. CUNA will email the latest source files.

- The vendor must send the latest version of all copyrighted documents **directly** to AdminOps@immonline.com to ensure that the FI is licensed to use them.

Collecting the Latest Sources Files for Proprietary Documents

The FI should send the latest version of all proprietary documents to AdminOps@immonline.com.

The Creation and Maintenance of eSign Documents

For the initial implementation of eSign, IMM will create a proposal to convert all Jetform documents to the eSign documents format. All eSign documents are designed and mapped using LiquidOffice Form Designer.

To order new or revised copies of existing documents in the future, refer to the "Document Pricing Guidelines" on www.immonline.com for detailed information on document pricing. Browse to "Support → Support Guidelines" and Click "View our Pricing Guidelines"

Refer to "Guidelines for ordering documents with IMM" and "Guidelines for FI to Create and Maintain documents" for further details on eSign documents.

eSign Documents Key Points

eSign Documents' Field Mapping

eSign documents have two types of fields mapped: Host Fields and Generic (Fill-from-Screen) Fields

Host Fields

- Fields which auto-populate from Loandesk are referred to as "host fields." They appear in light green on your documents.

- All host fields are populated using the XML file generated by Loandesk. By default, eSign will lock them upon display of the document.

- If the host fields within Loandesk contain incorrect data, then you must update the data within Loandesk.

Generic (fill from screen) Fields

- Fields that do not auto-populate from Loandesk are referred to as "generic fields." They appear in light blue on your documents and can be completed manually.

- All generic fields without data will remain open before signing.

Fields Locking Options - Default Behavior:

- All fields will be locked once the first signer signs and saves the session.

Fields Locking Options - Optional Behavior:

- There may be times when documents require signer-specific fields to remain unlocked until signed by the specific signer when signing in-person or remotely.

- There may be times when the document requires specific fields to remain unlocked within the signed session to have an auditor complete them. Such fields must have the prefix of "IMM_UNL_" which allows the field to remain unlocked within a signed session.

- An eSign administrator can control this behavior for each document since it is optional.

Uploading eSign Documents

Up to this point, Fiserv has mapped your Jetform documents and uploaded them to Loandesk. Going forward, the FI will be responsible for uploading the documents to eSign.

- For step-by-step instructions on uploading eSign Documents, see How to upload eSign documents.
- To understand how eSign handles the re-uploading of previously uploaded documents, see Best Practices Uploading Revised/Updated documents into eSign.
- The eSign Administrator (the resource handling eSign documents) should create "eSign Documents" folder and save all eSign documents that IMM will send throughout the implementation of eSign. This folder can be created on any desired location – network drive or workstation.

Use of Mapping Reference File – Descriptions.txt

Descriptions.txt file is a field mapping reference file that stores FI specific values. As your IMM designer send the updated file, the FI will be responsible for checking in the updated Descriptions.txt file.

- During the eSign installation, a default Descriptions.txt will be installed.

- IMM will be responsible for updating and maintaining the mapping reference file.

- For step-by-step instructions related to check-in of Descriptions.txt file, click on the link How to upload eSign documents.

Printing eSign Documents

- eSign enhances your documents process and eliminates the need to print, however the FI may decide to print eSign documents depending on various requirements.

- eSign launches on "New Session" screen, after selecting desired documents, the user clicks "Process" and clicks "Continue" for each document. After processing all documents successfully, eSign will save a session and show "Session Details" screen.

- To Print all documents, they should be printed from the "Session Details" screen.

  - To print a specific document, Click on the "Preview" icon of the desired document.

  - To print all documents at once, Click on the "Preview" icon of the "Document Set".

- To Print documents for each signer, they should be printed from the "eSignature Management" screen.

  - Click on the "Print" icon for each signer before/after signing documents.

- **Important Note for Duplex Printing**: In order to print Duplex, the eSign user MUST select "Duplex" property before clicking OK to PRINT the PDF.

eSign Training – Frequently Related Questions

How to Toggle Documents Printing Between Jetform and IMM eSign

The FI needs to toggle between to Jetform and eSign documents to complete testing. Here are the required steps.

- Login to LoanDesk with an account having Admin rights

- Select the "Setup" menu

- Select "Workstation Configuration"

- Select the "General Configuration Page 2" tab

- From the Print Engine drop-list, select "IMMFORM" to turn on the eSign integration.

- From the Print Engine drop-list, select "JETFORM" to turn on the Jetform integration.

How to create an eSign Document Set and Configure Intuitive Document Set Selection

To create a Document Set:

- The FI should create a Document Set in eSign using the eSign Administrator Guide or the provided video.

- Document Set creation starts at the 7:13 mark: https://www.immonline.com/portfolio-posts/imm-esign-2018-cloud-xml-admin-training-documents-maintenance-document-sets/

- The eSign Administrator can make the desired Document Set changes based on demand.

- The eSign Administrator can enable "Required" for specific documents of the set, so the user cannot remove them.

To configure the intuitive document set selection feature, which will select a Document Set based on Loan Type Code entered in the Descriptions.txt, follow these five easy steps:

1. Take a screenshot of your Loan Type Codes Setup screen.

2. Create a "Match List" that includes "Loan Type Description (Loandesk) = eSign Document Set."

3. Email the "Match List" to your IMM designer

4. IMM designer will update your mapping reference file, Descriptions.txt

5. FI will check-in the "Descriptions.txt" and test the intuitive selection by using different loan types. To know check-in instructions, click Checking In/out of Mapping Reference file - Descriptions.txt

How to Upload eSign Documents

Save the documents from your email:

- The FI should save documents from the secure FileDrop link on the workstation.

- The FI should unblock the downloaded files by performing the following steps:

    o Right-click on the downloaded file
    o Click Properties. Under the "General" tab
    o Attributes: select "Unblock" if displayed
    o Click OK to save changes
    o Extract the PDFs from the zip file. They can be saved to the desired location.

Login to eSign:

- Only eSign administrator can upload documents to eSign.

- eSign documents cannot be uploaded from the workstation of the RDP session of the thin client environment

- eSign documents can ONLY be uploaded from the eSign user's workstation - Open Internet Explorer from the workstation.

- Browse to the IMM Cloud site: https://immesign.com/teaasp/login.aspx

    o Enter your FI ID.
    o Click on Login.
    o If the user has pre-saved the Azure login credentials, then the user will NOT be asked to login via Azure
    o If the user has NOT saved the Azure login credentials, then the user will be asked to login via Azure.

Uploading documents

- After a successful login, the Documents Maintenance (XML) screen will open.

- Click "Upload Documents."

- Select the dictionary type as "LDLN."

- Option 1:

    o Click on "Select Files" button

    o Browse to the location where the eSign PDFs have been saved.

    o Select the desired PDF files and click "Open."

- Option 2:

    o Browse to the location where eSign PDFs have been saved.

    o Select the desired PDF files and drag-drop them onto the designated area of the "Upload Documents" screen.

- The selected documents should appear on the "Upload Documents" screen. Click the "Upload" button.

- If the document uploaded successfully, then the "checkmark" sign will show for each document.

- If the document has **not** been uploaded successfully, then the "X" sign will show for each document.

Best Practices Uploading Revised/Updated Documents into eSign

- When a revised or updated document is uploaded to eSign without file name changes, eSign will replace an existing document with the same file name. All of the following document-level configurations will be preserved.

    o Document Set

    o Criteria

    o Unlock Fields

    o Recurring Type

- When a revised or updated document is uploaded to eSign with a changed file name, the eSign will upload it as a new document. All of the following document-level configurations will have to be completed again.

    o Document Set

    o Criteria

    o Unlock Fields

    o Recurring Type

- Be aware of the following:
    - The newly-uploaded documents will be used for newly-created sessions.
    - The newly-uploaded document will not be overwritten for existing saved sessions.

Checking the Mapping Reference File – Descriptions.txt – In/Out

Login to eSign:

- Only eSign administrator can "Check-In" or "Check-Out" documents to eSign.
- The Descriptions.txt cannot be checked in or out from the workstation of the RDP session of the thin client environment.
- The Descriptions.txt can only be checked in or out from the eSign user's workstation - Open Internet Explorer from the workstation.
- Browse to the IMM Cloud site: https://immesign.com/teaasp/login.aspx
- Enter your FI ID.
- Click on Login.
- If the user has pre-saved the Azure login credentials, then the user will not be asked to login via Azure
- If the user has NOT saved the Azure login credentials, then the user will be asked to login via Azure.
- After a successful login, the Documents Maintenance (XML) screen will open.
- Browse to General Settings – Click on "Check In/Out" tab.
- Click on the "Edit" button.

Save the Descriptions.txt from your email and Check-In:

The FI should save the Descriptions.txt file from your email to the desired location on the workstation.

- To Check-In, Click on the "Browse" button.
- The "Open" dialogue box will appear. Browse to the desired location and select the "Descriptions.txt" file and Click Open.
- Click "Check In" button.
- Upon the successful check-in of the file, the message "The files are checked in." will appear on the "General Settings" screen.

Check-out:

- To Check-out, click on the "Check Out" button.
- It will prompt you to save a zip file.   Save it to your desired location.
- The FI should email the zip file to the IMM designer to make necessary updates.

eSign Features which will not Work within the RDP Session of the Thin Client Environment

- Third-party attachments
- Regular attachments

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- Uploading documents

- Check In/Out

- Your In-Person signing ceremony, depending on the selected signing device explained during Implementation Preparation – see In-Person Signing Devices for more information.

How to Create/Process and Save a "New Session" in eSign

If the FI has not already toggled documents printing to "IMMFORM," do so using the instructions How to Toggle Documents Printing between Jetform or IMM's eSign.

- Browse to an existing or a new loan application

- Click on the "Print" button.

- From the "Loan Desk - Print" window, select "Forms" and click "Submit" to launch eSign.

- eSign will launch within the new Internet Explorer window.

- Document processing within eSign begins from the "New Session" screen. Note that the primary applicant's name will appear next to the "New Session - ….." This is one way to tell whose documents you are about to generate.

- Select desired documents to process. There are three different methods used to select documents:

  1. Build document sets and configure the intuitive document set. For the step-by-step process, see How to create eSign Document Set and configure intuitive document set selection.
  2. Build document sets and manually select one.
  3. Manually select the individual document(s)

- To Process documents:

  o Click the "Process" button. Do not use the "Print Preview" button as the documents are displayed without formatted data.

  o Click the "Continue" button to go to the next document. Continue the same process for each document within the session.

- After successfully submitting all eSign documents, eSign automatically saves a session, and the session expiry information is displayed on the "Session Details" screen. If the FI user clicks "Cancel" in the middle of processing documents or closes the Internet Explorer window, the session will not be created.

- Once eSign launches the Loandesk application is locked. The only way to access Loandesk again is to complete eSign documents processing and log out.

How to Retrieve a "Saved Session" Using eSign from LoanDesk

If retrieving a session on a workstation outside of the RDP session of the thin client environment:
- Login into eSign.

- For easy use, save the eSign login link on a desktop or as a favorite link within Internet Explorer.

If a retrieving session on a workstation outside of the RDP session of the thin client environment:
- Select an existing or new loan application

- Click on the "Print" button.

- From the "Loan Desk - Print" window, select "Forms" and click "Search" and then "Submit" to launch eSign.

- eSign will launch within the new Internet Explorer window.

- Browse to "Search Active Sessions" screen.

- The session can be searched by using any search parameters configured in eSign.

How to Archive Documents

Each eSign session containing signature/initial fields can only be archived if they have been signed either in-person or remotely.

- If signed in-person, the eSign user needs to click on the "Archive" button manually.
  - If signed in-person, but the eSign user did not manually click "Archive," eSign will automatically archive documents if all signatures have been signed.
- If signed remotely, eSign documents will be downloaded automatically once all parties have signed.
- The DMS Client Utility has a scheduled task to download eSign documents signed in-person and/or remotely. Later, they will be moved to your Imaging system.

How to Plan Migration of eSign RTS In-House to eSign RTS in IMM Cloud

The use of eSign RTS is to process/sign/archive non-Loandesk documents. The following are some high-level key points for the migration of eSign RTS in-house to IMM Cloud.

These steps are to be implemented for the eSign XML Go-Live date:

- The FI needs to review how many saved sessions are in eSign RTS today. The FI should finish processing and archiving existing sessions using the existing eSign RTS before the cut-off date. Take the opportunity to delete all sessions that are no longer necessary before the cut-off date. These sessions will no longer be accessible once the FI migrates to IMM Cloud.

- The FI needs to upgrade to the newest version of eSign client components on all workstations to access non-Loandesk documents

- The installer will connect the eSign Client Printer to the eSign RTS Cloud on one of the workstations. The technical resource at the FI will finish connecting other workstations to the eSign RTS Cloud.

- The installer will upgrade AIM to the newest version and connect AIM to the eSign RTS Cloud.

- All existing templates are expected to work. Once the FI goes live with eSign XML, the FI is responsible for deleting AIM templates for Loandesk documents. The FI should only manage AIM templates for non-Loandesk documents.

- The FI and Installer should test one or two non-Loandesk documents: process, sign, archive, and import to the imaging system.

- The FI should create new sessions using eSign RTS Cloud.

- The installer will uninstall the server components on the in-house eSign RTS server during the dedicated support session on the Go-Live date.

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- The existing eSign RTS server can be used to install the DMS Client Utility to download documents from eSign in the IMM cloud.