IMM eSign Cloud

Implementation Plan

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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 attached “Implementation Project Plan” is designed to provide you with an overview of the project flow, key milestones along with anticipated time frames for the various stages and engagements of the project.

This should provide you with information to aid in establishing the required Bank resources to allocate to the implementation project, along with insights into what lies ahead in your IMM eSign implementation project.

If you should have any questions as you work through the form, please do not hesitate to contact your IMM Bank Solutions Consultant, or your IMM Implementation Project Manager.

# Project Benchmarks

Here are the project benchmarks and tasks associated with each benchmark.

[Stage 1](#_Stage_1):

1. Implementation Preparation

2. Documents Analysis

3. Configuration of your Cloud FI

4. Integration and End-to-End Testing

Stage 2:

5. Template Training

6. Documents Testing/Revision

7. Administration Training

8. End User Training

Stage 3:

9. Branch/Workstation Deployment

10. Pre Go-Live Check

11. Official Go-LIVE

# Stage Intro

## Stage 1

Stage 2

Stage 3

Project Management Calls

IMM’s Project Manager will schedule and conduct weekly project calls to ensure the project is on target by all applicable parties (Institution, Core, Imaging System, Document/Forms provider and IMM). If there are multiple products being implemented, the calls will typically be coordinated into a single project call.

The institution is to complete and provide all requested correspondence:

* Executed Contractual Agreements
* Customer Profile (Completed with IMM Bank Solutions Consultant)
* Bank’s Color Logo
	+ File Specifications: 60 pixels tall x 200 pixels wide
* Documented Specifics of Your Internal Operations Processes

**Stage 1 – Installation & Configuration:**

Implementation Preparation

During the status calls with your IMM team, you can anticipate discussing the following for preparation of Implementation:

* Initial documents list spreadsheet for First Business Application being implemented
* Microsoft Azure Active Directory
	+ Local Domain Name
* System Requirements and Preparation
	+ Business Application Requirements
* High availability workstation or server for install of download utility
	+ Imaging Systems Requirements
		- Identifying the Search Tokens
* Client Software Requirements
* In-Person Signing Devices (if applicable)
* Establishing Project Timelines
* Training Requirements
* Open Items or Concerns

Templates Analysis

This is an Interactive Temples evaluation and Training. Purpose -

* Collection of documents for the first Business System that you are implementing
* Must be done prior to the meeting
* After aim and client install then the collection of docs

A spreadsheet is recommended for managing of the template creation

Attendees –

Bank Representatives that will be designing the templates for all Business Applications

* Bank Representative from the Operations dept who can process documents and understand the business expectation from their Business System

Configuration of your Cloud FI

Installer to complete the following:

* Create Azure Account
* Create your FI on IMM Cloud and Connect it to Azure Account
* Create Adobe site (For eSign Remote customers only)

Integration and End-to-End Testing from the Business Application

The Bank and Installer will perform couple of test transactions, which ensures the connectivity from your Business System to eSign into your imaging system. Following tasks will be performed to ensure the connectivity.

* Installer to install AIM on the designer’s workstation
* Installer to create one template with the Bank’s designer
* Installer to configure required index fields which are also known as search tokens in your imaging system.
* Launch eSign from your Business System using the template created above
* eSign to auto populate required index fields
* Bank to sign document using In-Person signing devices.
* Bank to sign document using remote signatures.
* Each eSign document signed in-person can be archived and move to your Imaging system
* Each eSign document signed remotely can be archived within 24 hours from Adobe portal and move to your Imaging system
	+ To download your remotely signed documents, the Bank is responsible to run the download documents utility.

Who should attend?

* Bank Representative(s) from the IT dept who has Administration Privileges to perform installation
* Bank Representative from the Operations dept who can process documents and understand the business expectation from their Business System

**Stage 2 - Training:**

Template Training

Administrative Index Manager (AIM) training will cover support and maintenance of the design template creation of your documents. This is typically a two hour session.

* Creating document templates - defining signatures fields and party information
* Mapping Indexes parameters for importing into your Imaging system

Who should attend?

* Bank Representatives that will be designing the templates for all Business Applications

Administration Training

Administrative training will cover support, maintenance and protection of the IMM eSign system. This is typically a two hour session.

* A demo of the eSign process (including in person and/or remote signature capturing)
* eSign screens and settings

Bank will be provided the CAT for review. The matrix testing will need to be performed with each system.

Who should attend?

* Bank Representatives that will be configuring the Administrative settings of the eSign solution

End User Training

User training will cover the use of eSign for your employees that will be using the system. Attendees to this session will able to then carry out the training for your remainder of your Bank employees. This training is typically a two hour session.

This session will include the following topics:

* A demo of the eSign process (including in person and/or remote signing ceremonies)
* Explanation on all features and functionalities (Document processing, capturing signatures, attaching supporting PDFs and archiving document sessions)
* eSign process screens for users
* Adobe Sign portal for managing eSign documents submitted for remote signatures

Who should attend?

* The trainers who attend this training are required to train the remainder of your staff.

**Stage 3 – Preparation for Live:**

# Customer Acceptance Testing

This stage of testing occurs after IMM has certified the system and provided training to the Bank. Once training has been completed, the Bank will perform Acceptance Testing to ensure that all aspects of the system are working as designed and ready for the Bank’s training of its staff and subsequent Go-live. The Acceptance Testing matrix is required to be completed and returned to your project manager a month prior to the live date.

Note: If your bank has multiple models of signature pads and scanners then ensure each model is certified thoroughly through your testing cycle.

# Permissions and Exclusions

You will need to set both permissions and antivirus exclusions per the appropriate product specification documents, which will be provided to you as part of the project.

# Workstation (live) Installation

You will roll out the client portions of this product including software and hardware.

# Training Materials

For all training sessions, there are materials that will be provided as part of the class invitation. You can request those materials ahead of training being scheduled if you would like to review them in advance.

Pre Go-Live Check

Roughly one week prior to your Go Live date, the Installer will connect with the Bank’s IT representative to purge all the test transactions for a clean eSign environment for your Go Live date.

# Go Live Support

On your go live day, you will have dedicated support from your IMM installer to help ensure a smooth transition to you live status.

Once you go live, you have full access to IMM Support in an ongoing basis. We will transition and introduce our support center procedures and contacts.