

IMM eSign plus

2018.1

Administrator Guide

Workflow Edition

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Introduction

This guide provides an overview of the IMM eSign plus (IMM eSign with Workflow) procedures available to users with administrator privileges.

Images in this guide are from Windows® 10 with Internet Explorer® 11. Your screens may differ with a different OS or browser.



Some functions and procedures described in this guide may not be available for your installation.

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. Workflow is a generic term for IMM eSign *plus*.

Groups and Privileges

The following groups and users are automatically created when IMM eSign plus (Ready to Sign (RTS)) is installed:

Groups

- **Users:** Created in IMM eSign plus by the Financial Institution Administrator (FIAdmin). Able to create and process all authorized workflow sessions via the Cases page. The FIUser is a member of the Users group.
- **DocumentAdmins:** Same privileges as the Users group plus able to manipulate workflows (Workflow Builder). The DocAdmin is a member of the Document Admins Group.
- **Administrators:** All rights of the Users and DocumentAdmins groups plus able to assign workflow permissions/rights to other users and perform administrative functions for the FI.



If your Financial Institution has upgraded to using IMM eSign plus, DocAdmin users, previously in a non-IMM eSign plus version, will be given limited Workflow Builder permissions. They may require additional permissions to access other required settings. Refer to the User/Document Administrator Guide for more information.

Getting Started

After IMM eSign plus has been installed on the server and client workstations, several settings should be performed before beginning to process documents.

Step	Function of
Browser Support Refer to the Browser Setup Guide for browser settings.	<i>All workstations used to process documents will need these settings.</i>
Login	Administrator
Assign Administrator User Privileges	Administrator
Modify Financial Institution Settings	Administrator
Modify Index and Dictionary Settings	Administrator
Upload Documents (XML)	Administrator
Define Attached Documents (XML)	Administrator
Add Document Sets (XML)	Administrator
Set Up Document Mover Service	Administrator

Browser Support

Refer to the Browser Setup Guide for Internet Explorer and Firefox settings.

Login

When you process document transactions from your host, you are taken directly to the Session Details window. You will be automatically connected through your logon information. If you need to manually log in, follow this procedure.

1



Windows Fast User Switching is not supported.

From **Microsoft Internet Explorer**,

Browse to *http://YourServer/teaasp/Login.aspx*.

- 2 The Login Screen appears.
All items are required.
 - 1 **Financial Institution (FI) ID:** Enter your Financial Institution ID.
 - 2 **User ID:** Enter your User ID (FI Administrator: FIAdmin).
 - 3 **Password:** Enter your password.
 - 4 Click **Login**.

The screenshot shows a login form with the following elements:

- * Financial Institution (FI) ID: Enter Financial Institution ID (Step 1)
- * User ID: Enter User ID (Step 2)
- * Password: Enter Password (Step 3)
- Buttons: (Step 4) and

- 3 The Documents Maintenance page appears.
You have successfully logged into TotaleAtlas.
After 3 unsuccessful login attempts, your account will be locked out. [Not applicable to Workflow Installations.]
Contact the Host Administrator to have your account unlocked. [Not applicable to Workflow Installations.]
- 4 On some installations, Password Expiration controls may be set (IMMAdmin setting), resulting in password related messages.

Change Password

Follow the procedures listed at [Reset Password](#) on page 125 and change the *password* for the FI Admin.

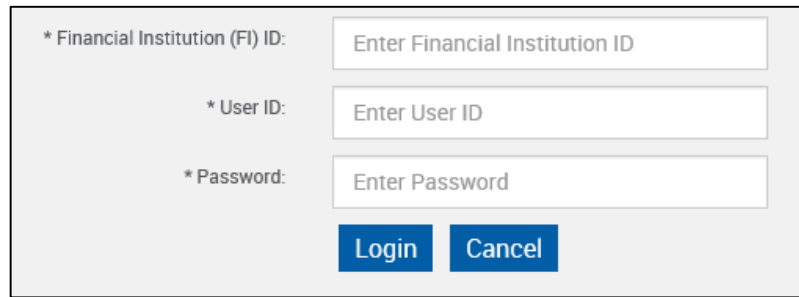
Assign Administrator User Privileges

This procedure will add a user who will be used to perform administrative functions. Administrative functions should only be performed as a user that is logged on from your host and has been assigned Administrators privileges. Refer to [Groups and Privileges](#) for more information.

- 1  Windows Fast User Switching is not supported.

From Microsoft Internet Explorer, browse to <http://YourServer/teaasp/Login.aspx>.

2 The Login Screen appears.



* Financial Institution (FI) ID:

* User ID:

* Password:

Complete the following login information.

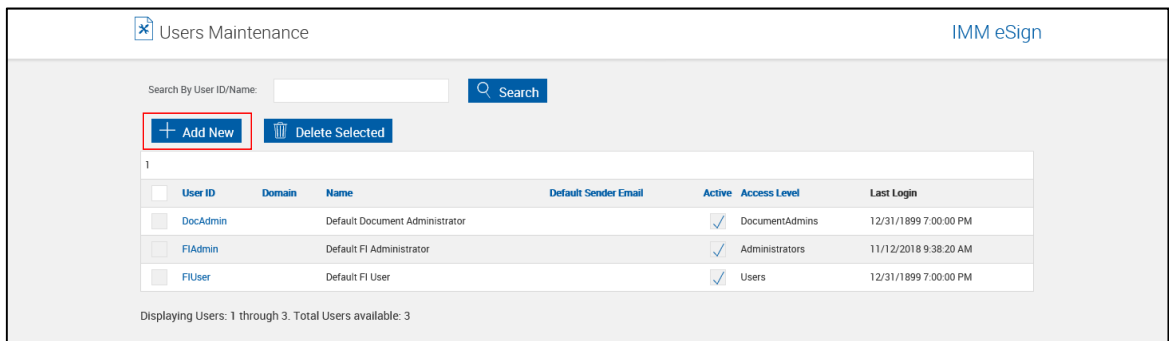
- **Host Financial Institution (FI) ID:** Enter your *Financial Institution ID*.
- **User ID:** *FIAdmin*
- **Password:** Enter the *FIAdmin password*.

Click **Login**.

3 The Documents Maintenance page appears.

Click **Administration > Users**.

The Users Maintenance screen appears.



Users Maintenance IMM eSign

Search By User ID/Name:


<input type="checkbox"/>	User ID	Domain	Name	Default Sender Email	Active	Access Level	Last Login
<input type="checkbox"/>	DocAdmin		Default Document Administrator		<input checked="" type="checkbox"/>	DocumentAdmins	12/31/1899 7:00:00 PM
<input type="checkbox"/>	FIAdmin		Default FI Administrator		<input checked="" type="checkbox"/>	Administrators	11/12/2018 9:38:20 AM
<input type="checkbox"/>	FIUser		Default FI User		<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM

Displaying Users: 1 through 3. Total Users available: 3

Click **Add New**.

5 The Users Maintenance screen refreshes.

- 1 **User ID:** Enter a user ID for the new user. (Letters, numbers, dashes or underscores only)
- 2 **Domain:** Enter the expected domain of the user (50 characters maximum). If left blank, the default domain will be used and will not be visible to the user.
- 2 **Name:** Enter the user name (50 characters maximum).
- 3 **Active:** Check to make the user active. When checked, the user can log onto the eSign system. When not checked, the user cannot logon.
- 4 **Group:** Administrators
- 7 **Password:** Enter a password for the user.
- 8 **Confirm Password:** Reenter the password for the user.

 The user password must be at least 8 characters long and must contain one lower-case letter, one upper-case letter and one digit.

Click **Save**.

6 Log out and close IMM eSign plus.

From this point on, all administrator changes should only be performed when logged in from your host system as the user you assigned with Administrators privileges.

Financial Institution Settings

Modify Financial Institution Settings

Follow the procedures listed at [General Settings](#) on page 128.

Add Users

Depending on your configuration, it may be necessary to add users before they can process documents or define documents. Refer to [Add User](#) on page 122 for more information.

Modify Index and Dictionary Settings (Administrator)

It may be necessary to modify your index and dictionary settings. Follow the procedures in the Imaging Index Service Administrator Guide for detailed information on these settings.

Activate Add-Ons

Follow the procedures listed at [Add-Ons Tab](#) on page 132 to upload Bar Code Cover Pages, Loan Coupon Files and LaserChex Files.

Upload Documents (XML)

Follow the procedures listed at [Uploading XML Documents](#) on page 67.

Define Attached Documents (XML)

Follow the procedures listed at [Attach Documents](#) on page 70.

Add Document Sets (XML)

Follow the procedures listed at [Add Document Sets](#) on page 85.

Set Up Workflow (Administrator or Document Administrator)

Refer to the TeA Workflow Building Quick Start guide for more information. In this guide the [IMM eSign plus Administrator Training Tasks](#) also contains information about setting up a workflow for your Financial Institution.

Set Up Document Mover Service

Follow the Administrator procedures listed in the Document Mover Install/Upgrade/Administrator Guide.

AIM Administration

Refer to the AIM Administrator Guide for a detailed guide to mapping and defining PDF documents for use with TeA RTS.

IMM eSign plus Administrator Training Tasks

[IMM eSign plus Overview](#)

[Adding and Setting Properties on IMM eSign plus Documents \(XML\)](#)

[Attachments and Scanner Specifications](#)

[Adding IMM eSign plus Document Sets \(XML\)](#)

[Adding Criteria to Documents](#)

[Index Field Type and Dictionary Maintenance](#)

[Workflow Building Tips and Recommendations](#)

[Workflow License Usage](#)

[Workflow Permissions](#)

[User Maintenance, Workflow Permissions and Active Directory Integration](#)

[Workflow Building Menu](#)

[Importing a Workflow](#)

[Conditional Routing](#)

[Notifications and Time-Based Alerts](#)

[Processing Menu](#)

[Reporting Menu](#)

[Additional IMM eSign plus Settings Menu](#)

[Important Links](#)

[IT Administrative Tasks](#)

IMM eSign plus Overview

This section will be used as a simplified outline for the IMM eSign plus Administration Training sessions. Please use this section as a refresher for tasks that will be delegated to the Administrative staff.

Adding and Setting Properties on IMM eSign plus Documents (XML)

Log in as an IMM eSign plus Administrator (or Document Administrator) to add XML documents for electronic processing. From the IMM eSign plus toolbar click **Administration > Documents**.

- Upload the document PDFs (select the respective data dictionary)
 - Set the document properties (criteria, recurring, display, archive, etc.)
- Add a placeholder for the supporting documents that can be attached to the IMM eSign plus document case.

Attachments and Scanner Specifications

When an IMM eSign plus case is active, external PDFs can be attached to the case for archiving.

- 10 PDFs per case
- Maximum PDF size limit is 5MB.
- Supported Scanners: ScanShell 3000D, ScanShell 3100D, Canon P-215

FYI: The first time the Attach Documents feature is executed on the workstation, the application will prompt to copy and register the Dynamic Web Twain Control. The logged-on user must have rights to perform this action.

Adding IMM eSign plus Document Sets (XML)

After XML documents have been uploaded in IMM eSign plus, the documents can be grouped into sets.

Click **Administration > Document Sets**.

- *Add the Document Set (Document Set names may not exceed 20 characters and can only use letters, numbers or underscores. Intuitive document set logic will require the DOCSET TYPE that can be retrieved from the data file)*
 - Add documents to the created Document Set
 - Click Add Selected Documents
 - Set the document properties that will pertain to this document set occurrence (required, recurring, display, archive, etc.)

Adding Criteria to Documents

Criteria are conditional statements that will disable documents if the condition is FALSE and enable the documents if the condition is TRUE. Criteria are triggered based on the host data file's target field and value.

Click **Administration > Criteria Maintenance**.

- Create the criteria
 - Provide a criteria name

- Enter the criteria condition

Now you can associate defined criteria with one or more of the uploaded document(s).

Index Field Type and Dictionary Maintenance

Defining Indexing fields and assigning the fields to the appropriate dictionary. IMM does not advise removing or adding indexes after IMM eSign plus is LIVE.

- Overview of indexing
- Creating New Index Fields
- Assigning Fields to Dictionaries

Workflow Building Tips and Recommendations

Before getting started with building a Workflow, here are a few tips and recommendations to guide you along the way.

- Create the group inboxes prior to modifying the Steps and Responses for the intended workflow. *If applicable assign email accounts to group inboxes. IMM recommends assigning the Imaging or IT department to the Imaging inbox.*
- Add the Steps prior to adding responses.
- For viewing and organization purposes, sort the Steps in chronological order
- Assign the workflow to applicable Document Set(s).
- IMM recommends a Document Set is associated to a single Workflow.
- Test the workflow with all responses and scenarios.
(Example: Routing, signature capturing, alerts and archiving into optical)
- After testing is completed, publish the workflow and assign group & user permissions to the workflow.

Workflow License Usage

IMM eSign plus will allow a subscribed number of users to access the application at a time. The Workflow License Usage screen will list the users that currently have active sessions. IMM suggests that users log out of the application when sessions are not being processed or researched. There is a scheduled task, daily at 3am, which will end all active sessions. Additionally, IMM eSign plus Administrators have the ability to manually end a user's session.

Click **Administration > Workflow License Usage**.

Workflow Permissions

All Workflows will require the users to have access for creating and routing cases. Each user or group can have routing permissions allowed for a specific Workflow. Workflow permissions are defined by the Active Directory. Managers will have access to their and their employee cases. Administrators will have access to all workflow cases.

User Maintenance, Workflow Permissions and Active Directory Integration

- IMM eSign permission levels

- IMM eSign plus permission levels
- Extracting the user names, email address, manager and groups from Active Directory
- Workflow Permissions
- Inbox Management

Workflow Building Menu

Creating a new workflow

- Editing an existing workflow
- Publishing a workflow and Version Management
- Published vs. In Development Versions
- Deleting a workflow
- Copying a workflow
- Importing / Exporting workflows (see Importing a Workflow)
- Linking Workflows to Document Sets
- Step Name / Step Instructions
- Overview of Step Types
- Workflow required Steps 0
 - (Start / Archive / Archive Failures / Done)
**If applicable*
- Linking Step Names to Step Responses

Advanced Workflow Features

- Conditional Routing
- Task Emails
- FYI Alerts
- Time Based Alerts

Importing a Workflow

IMM will provide the institution with a Master Workflow consisting of the required Steps with commonly used Responses. Below are instructions on importing and creating a copy of the Master Workflow. The institution will modify the copied workflow to reflect the additional steps and responses as needed.

Log into IMM eSign plus with Workflow Administrator permissions.

Click **Administration > Workflow Builder**.

Workflow Builder screen

Import the Master workflow

- Select Import Workflow from the Actions dropdown.
- Browse to the Workflow.xml and click Import.
- Select Yes to add the shared inboxes.

- Click OK on the Imported Successfully message prompt.
- Refresh the webpage.

Publish the Master workflow

- Click the In Development radio button.
- Select the Master Workflow radio button.
- Select Publish Workflow from the Actions dropdown.
- Enter Comments and Save.

Copy the Master workflow

- Click the Published Version radio button.
- Select the Master Workflow radio button.
- Select Copy Workflow from the Actions dropdown.
- Edit the Workflow Name and Description then Save (indicate a name that will be published for production use).

Now customize the Workflow specific to your internal processes. Additional configuration (Conditional Routing, Notifications and Time based alerts) can be added to the defined steps and responses.

Conditional Routing

Conditional Routing allows the session to be routed in accordance to data obtained from the data file or the form, depending on the previous step responses, signature status or the router's user role. This is a rule-based feature for a more innovative way to route the session to the appropriate department or individual based on specific criteria.

Notifications and Time-Based Alerts

Workflow has the ability to send notifications as steps are processed and/or if the session has not been routed to the next step for a defined time duration. Notifications are emailed to individuals or group email inboxes.

In addition, if a session has not been retrieved for a defined time the session can automatically route to an escalation process.

Processing Menu

- Create New Session
- Cases

Reporting Menu

- Session Status
- Audit
- Error Details
- Login Failures
- Add-Ons Report
- Status API Notification

- Remote Signature Status

Additional IMM eSign plus Settings Menu

- IMM eSign plus Administrative Settings Overview:
 - Configure the Add-Ons settings
 - Checking In/Checking Out process (used to upload custom files requested or provided by IMM)
 - Tracking events (*IMM recommends these settings remain as the default selections. (Archive and Delete only)*)

Important Links

IMM eSign plus Account Creation:

<http://<server>/TeAASP/HostDispatch.aspx?HostID=<??>&HSFIID=<??>>

Administration Guide:

http://<server>/TeAASP/help/TotaleAtlas_FIAdmin_Documentation.pdf

User Guide:

http://<server>/TeAASP/help/TotaleAtlas_FIUser_Documentation.pdf

Cases:

<http://<server>/TeAASP/HostDispatch.aspx?HostID=<??>&HSFIID=<??>&NavKey=MyTasks>

IT Administrative Tasks

Server Requirements

- See the IMM eSign plus System Requirement Sheet

Workstation Installation / Configuration:

- Windows XP is not a supported OS
- Microsoft .NET 4.0 or 4.5
- Installation of Adobe Reader (refer to the compatibility chart)
- Configuring the signature device
- Install the IMM eSign Client components
- Repair IMM eSign Client component for each user
- Internet Explorer Security Settings (IE8 not supported)
 - Trusted site / Local intranet
 - ActiveX controls
 - Log on using username and password

Virus Scan Exclusions on the IMM server:

- <install drive>\inetpub\wwwroot\TeASP
- <install drive>\inetpub\wwwroot\TeAASPFiles\

- C:\windows\temp
- C:\Windows\ServiceProfiles\NetworkService\

Back-up of SQL databases:

- TEAASP
- TEAWorkflow

Active Directory:

- Requires a domain account with permissions to read the active directory for Workflow permissions.
- User accounts – read Username, email address, manager, and groups / sub groups.
- Active Directory groups.

Exchange Server:

- Task Notifications and FYI emails.

ECM Import Requirements:

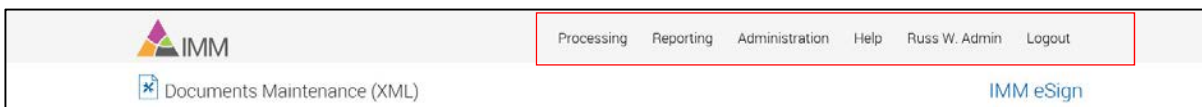
- Directory Sweep – Identify sweep location
- DIP import (Index file) – Identify index file parameters and requirements as defined by your ECM system.
 - If importing into multiple document storage types, a Parameters.txt file will need to be defined per document.

IMM eSign plus Menus

After the FIAdmin (Financial Institution Administrator) logs in, the Documents Maintenance page appears. Use the menu bar on the upper right-hand side of this screen to perform administrative duties for your Financial Institution. The User ID appears in the upper right corner.

The menu bar is common on all screens in IMM eSign plus:

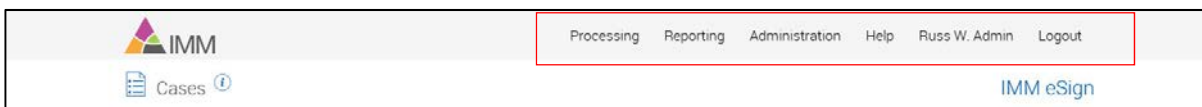
XML:



RTS:



eSign plus:



The following sections describe the menu options available along with brief descriptions of their functionality.

Processing

Reporting

Administration

Help

User Name

Logout

Processing

The following sub-menu choices are available:

Create New Session (XML)

Search Active Sessions (XML/RTS)

Search Completed Sessions (XML\RTS)

Cases (eSign plus)

Loan Coupons (Only when the Loan Coupons Add-On is activated)

Starter Checks (Only when the Loan Coupons Add-On is activated)

Custom Links: Only available if a **Custom Label/URL** (page 129) has been set up.

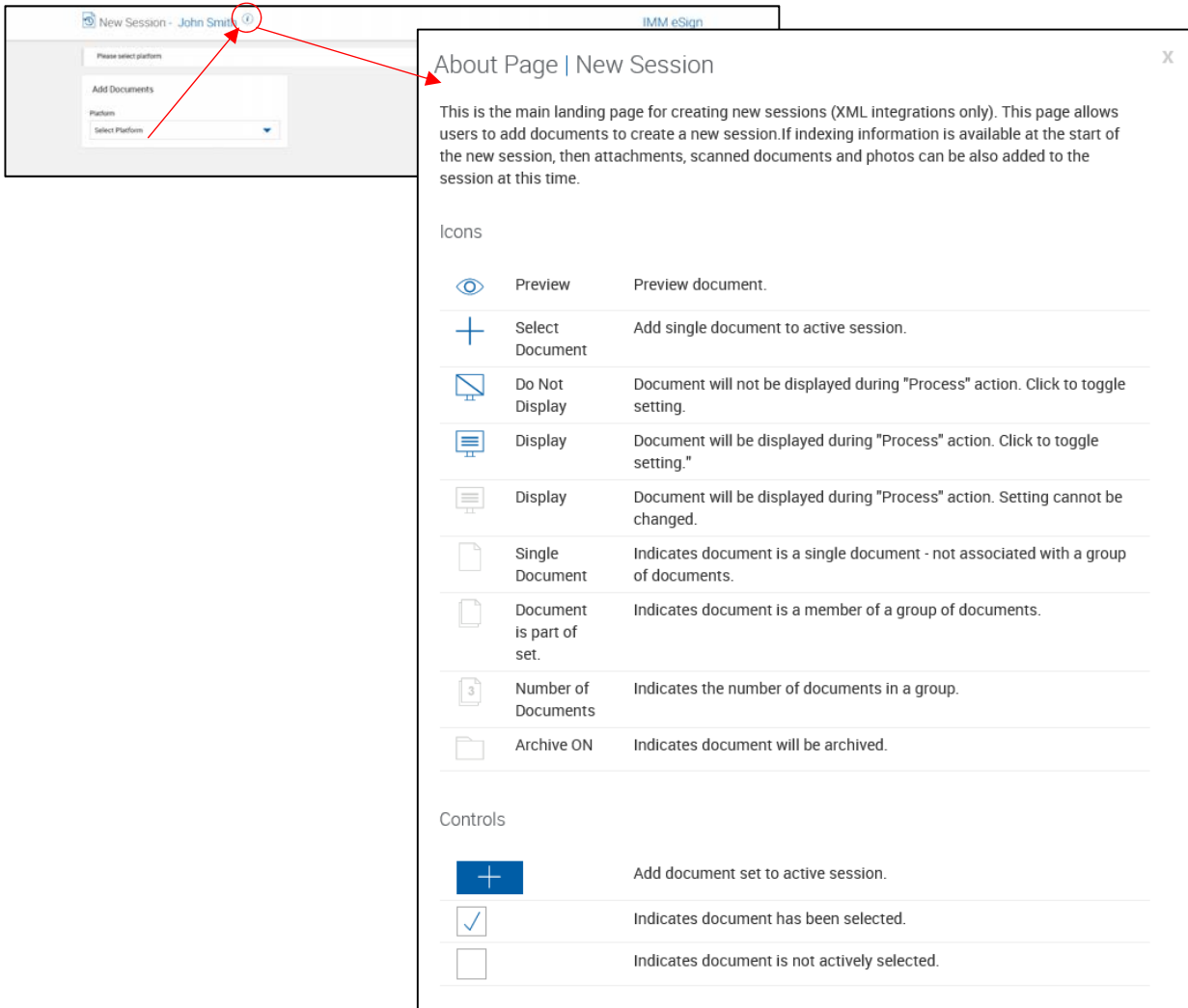
Create New Session (XML)

About Page – New Session

Click **Processing > Create New Session**.

The Help button provides a quick listing of icons and functions available and related to the New Session page.

Click the Page Help button.












The image shows a screenshot of the 'New Session' page in the IMM eSign application. A red circle highlights a help button (a question mark icon) in the top right corner of the page. A red arrow points from this button to a help window titled 'About Page | New Session'. The help window contains the following information:


About Page | New Session

This is the main landing page for creating new sessions (XML integrations only). This page allows users to add documents to create a new session. If indexing information is available at the start of the new session, then attachments, scanned documents and photos can be also added to the session at this time.

Icons

	Preview	Preview document.
	Select Document	Add single document to active session.
	Do Not Display	Document will not be displayed during "Process" action. Click to toggle setting.
	Display	Document will be displayed during "Process" action. Click to toggle setting."
	Display	Document will be displayed during "Process" action. Setting cannot be changed.
	Single Document	Indicates document is a single document - not associated with a group of documents.
	Document is part of set.	Indicates document is a member of a group of documents.
	Number of Documents	Indicates the number of documents in a group.
	Archive ON	Indicates document will be archived.

Controls

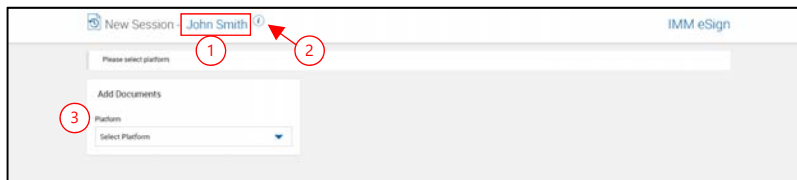
		Add document set to active session.
<input checked="" type="checkbox"/>		Indicates document has been selected.
<input type="checkbox"/>		Indicates document is not actively selected.

Create New Session

Please refer to the User Guide for a detailed explanation of processing sessions.

- 1 This page is used to create a session manually *when a document set is not specified in the XML data file*.

Click **Processing > Create New Session**.

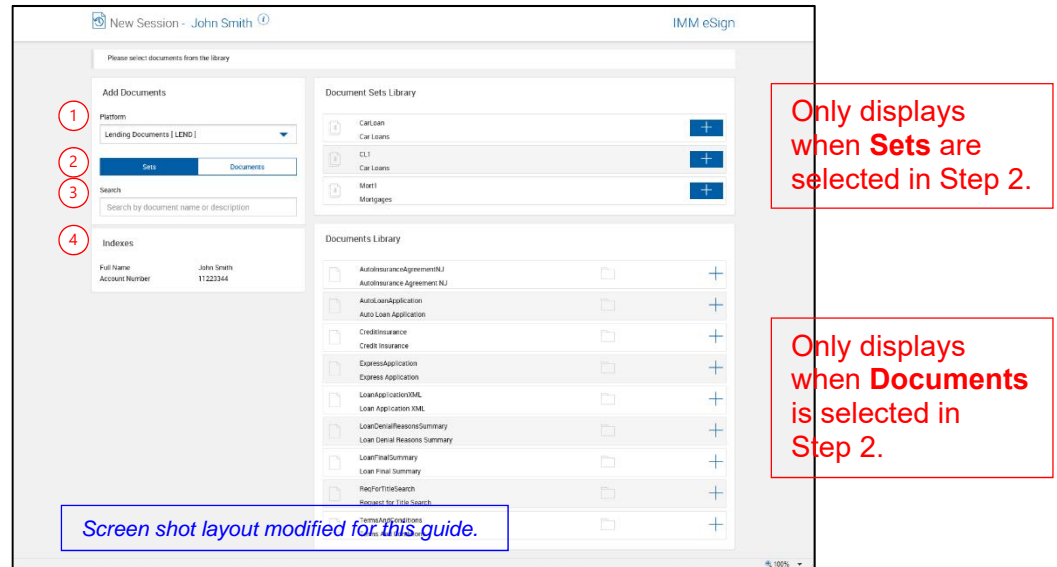


In addition to all User functions, the *FI Administrator* can also:

- 1 **Applicant Name:** The full name of the primary applicant in the data file. Depending on the configuration this link can be clicked to view the XML data sent from the host. The data will be stored in a password-protected .zip file. This is controlled by the Administrator.
- 2 **Help Button:** The Help button provides a quick listing of icons and functions available and related to the Search Active Sessions page.
- 3 **Platform:** To continue, select a platform, previously referred to as a dictionary.

2 The page refreshes.

Note: This screen shot layout has been modified for use in this guide. In normal operation, only the Document Sets Library OR the Documents Library will be displayed, *not both*.

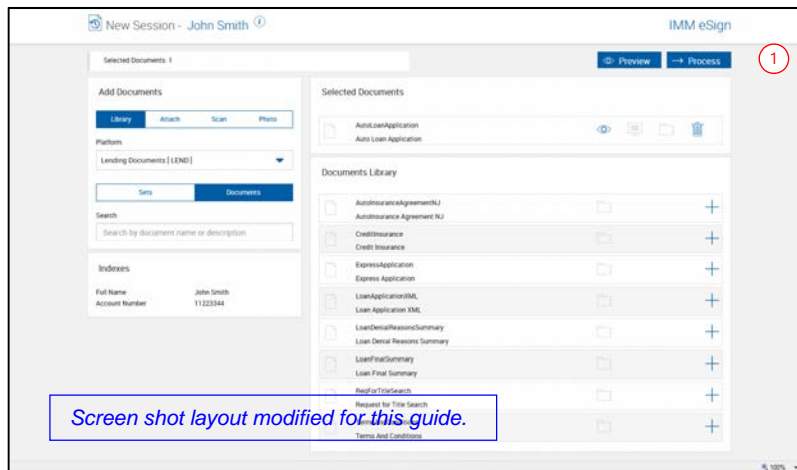


- 1 **Platform:** Selected in previous step and can be changed before adding documents or a set.
- 2 Selected **Sets** or **Documents**.
- 3 **Search:** Search for specific sets or Library. Refer to [Search Hints](#) on page 172 for more information.
- 4 **Indexes:** The index information associated with the XML data that was passed from the core/host system is displayed here.

Select a Document Set or individual documents to continue.

3 The page refreshes.

Note: This screen shot layout has been modified for use in this guide. In normal operation, only the Document Sets Library OR the Documents Library will be displayed, *not both*.



After a Document Set or at least 1 document has been selected,

- 1 Click Process to continue.

Refer to the User Guide for a detailed explanation of processing sessions.

Search Active Sessions (XML/RTS)



This feature is not available in Workflow installations.

This feature allows the user to retrieve active sessions that have previously been saved.

- Sessions created in **2018.1** can be processed in *TeA on the PC* or an *iPad version of TeA on the iPad*.



1. *DocQ* is a generic term for *Active Sessions*.
2. The index/search fields used in this guide are sample fields only. Your search fields may differ.
3. The index/search fields that display depend on the index fields that have been defined in
 - a. eSign Admin Manager (Refer to *View/Edit Index Types* or *Define Custom Index Types* in the eSign Admin Manager Administrator Guide.) or
 - b. **Index Fields** (page 106).

Your search fields may differ.

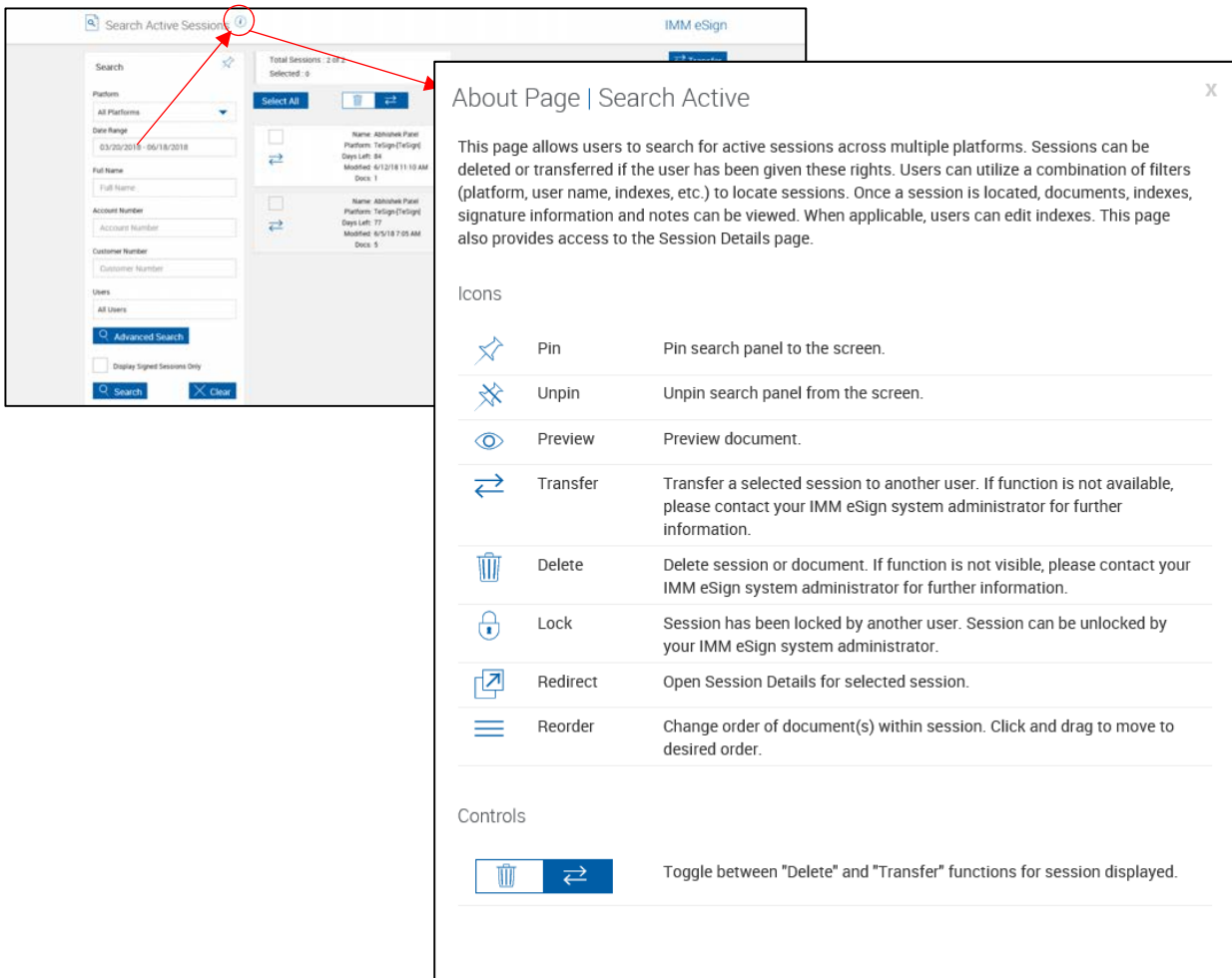
4. Active Sessions are stored for the time period specified in the **Retain Active Sessions (Days)** setting on page 132. This setting also controls the length of time a document will be retained after being edited.

About Page – Search Active

Click **Processing > Search Active**.

The Help button provides a quick listing of icons and functions available and related to the Search Active Sessions page.

Click the Page Help button.











The screenshot shows the 'Search Active Sessions' interface. A red circle highlights a help icon (a question mark) in the top right corner of the page. A red arrow points from this icon to a pop-up window titled 'About Page | Search Active'. The pop-up window contains the following information:


About Page | Search Active

This page allows users to search for active sessions across multiple platforms. Sessions can be deleted or transferred if the user has been given these rights. Users can utilize a combination of filters (platform, user name, indexes, etc.) to locate sessions. Once a session is located, documents, indexes, signature information and notes can be viewed. When applicable, users can edit indexes. This page also provides access to the Session Details page.

Icons

	Pin	Pin search panel to the screen.
	Unpin	Unpin search panel from the screen.
	Preview	Preview document.
	Transfer	Transfer a selected session to another user. If function is not available, please contact your IMM eSign system administrator for further information.
	Delete	Delete session or document. If function is not visible, please contact your IMM eSign system administrator for further information.
	Lock	Session has been locked by another user. Session can be unlocked by your IMM eSign system administrator.
	Redirect	Open Session Details for selected session.
	Reorder	Change order of document(s) within session. Click and drag to move to desired order.

Controls

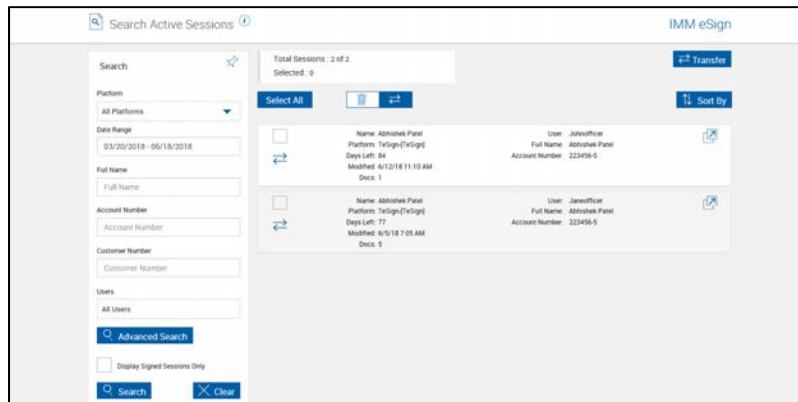
	Toggle between "Delete" and "Transfer" functions for session displayed.
-------------------------------------------------------------------------------------	-------------------------------------------------------------------------

Search Active Sessions on the PC

Click **Processing > Search Active**.

This feature allows the user to retrieve active sessions that have previously been saved.

Please refer to the User Guide for a detailed explanation of the Search Active Sessions function.



In addition to all User functions, the *FI Administrator* can also:

- 1 Search for *all active sessions* by leaving all input boxes *blank*,
- 2 *Always* select the Owner. (The display of Owner selection for *users* is controlled by the **Search Active Sessions Filter** setting on page 133.)
- 3 Delete saved sessions, as explained in **Delete Sessions** on page 28.
- 4 Unlock locked sessions as explained in **Unlock Sessions** on page 29.

Delete Sessions

Delete Sessions on the PC

1

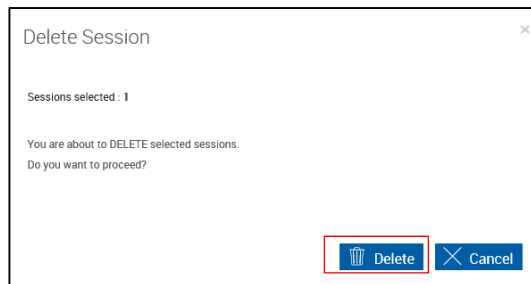


1. The *FI Administrator* can delete single, multiple or all sessions. The delete function is always available to the *FI Administrator*. The **Allow users to delete sessions** setting (page 133) is used to allow users to delete sessions.
2. Locked sessions cannot be deleted.
3. After clicking Delete, there might be a slight delay depending on the number of documents in the database. Please wait for the page to refresh before proceeding.

To delete sessions:

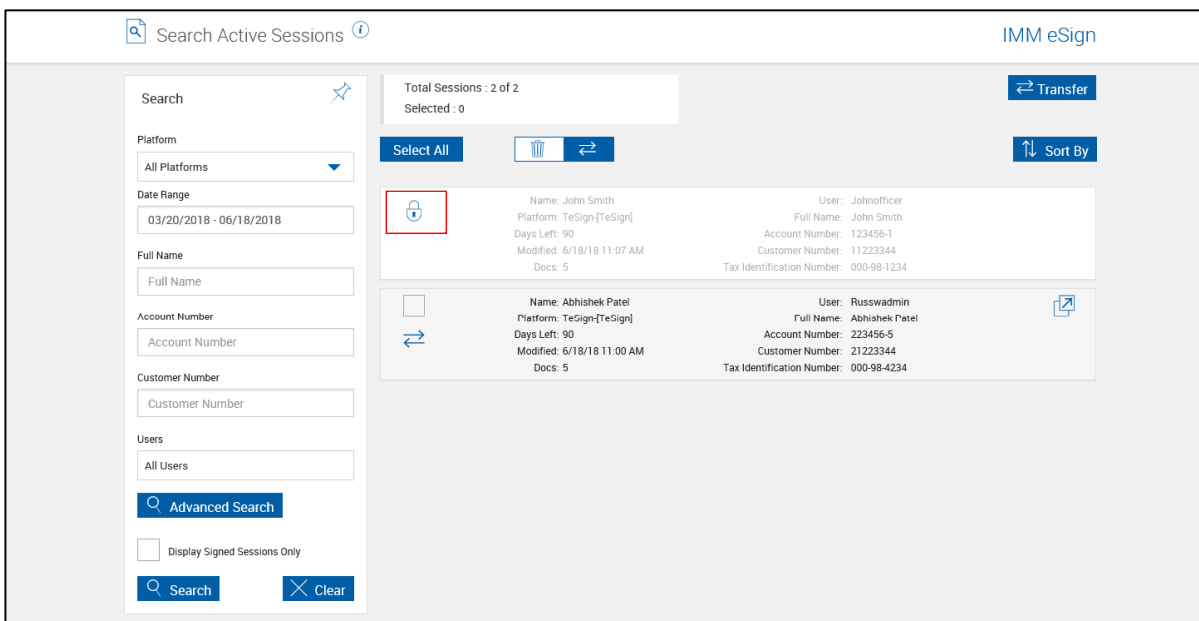
- 1 Click the **Delete** selection button (garbage can).
- 2a Click **Select All** to select all *unlocked* sessions.
- 2b Select multiple sessions by clicking selection check boxes. Expanded sessions can be selected. Locked sessions cannot be selected.
- 3a Entire sessions can be deleted by clicking the trash can icon on the *left* of the session list.
- 3b Individual documents within the session can be deleted by clicking the trash can icon on the *right* of the session list.
- 4 After selecting multiple sessions (2b), click the **Delete** button again to delete all selected sessions.

- 2 The Delete Session popup appears.
Click **Delete**.



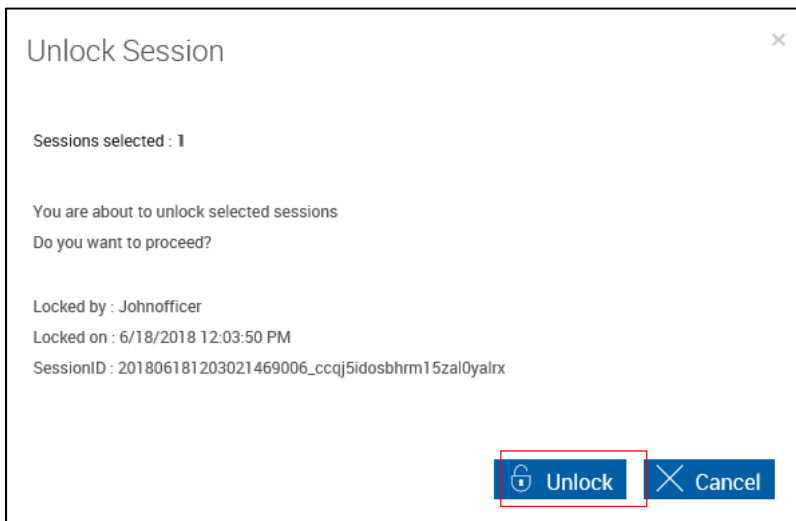
Unlock Sessions

Unlock Sessions on the PC



The Unlocked Selected Sessions popup appears.

Click **Unlock** to unlock the session.



Transfer Ownership

Please refer to the User Guide for a detailed explanation of the Transfer function.

Search Completed Sessions (XML\RTS)



This feature is not available in Workflow installations.

This feature allows you to access saved, archived sessions.

Click **Processing > Search Completed**.



The index/search fields that display depend on the index fields that have been defined in

1. TotaleSign Admin Index Manager (Refer to View/Edit Index Types or Define Custom Index Types in the TotaleSign Admin Index Manager Administrator Guide.) or
2. **Index Fields** (page 106).

Your search fields may differ.

Please refer to the User Guide for a detailed explanation of searching archived documents.

As an Administrator, you can search all completed sessions by leaving All Input Boxes blank.

About Page – Search Completed

Click **Processing > Search Completed**.

This feature provides a quick listing of icons and functions available and related to the Search Completed Sessions page.

Click the Page Help button.

The screenshot shows the 'Search Completed Sessions' page in the IMM eSign interface. A red circle highlights the help icon in the top right corner of the page header. A red arrow points from this icon to a help popup window titled 'About Page | Search Completed Sessions'. The popup contains the following information:

This page provides access to completed session documents across multiple platforms. FI Administrators can reindex documents from this page. FI Administrators and Document Administrators can generate indexing reports as well.

Icons

	Pin	Pin search panel to the screen.
	Unpin	Unpin search panel from the screen.
	Preview	Preview document.
	Indexing Status	Indicates the document has been indexed.
	Number of Indexing Attempts	Count of how many times indexing was attempted (1-3).
	Signature Method	Indicates session was signed remotely.

Cases (eSign plus)

Please refer to the IMM eSign plus User Guide for a detailed explanation on processing Cases, including information about routing, processing, previewing, attaching and removing documents and the Remote Signature Status.

In addition to all User functions, the Administrator can also unlock locked cases.

Click **Processing > Cases**.

Default Cases Page with No Workflow Specified

The screenshot displays the 'Cases' page in IMM eSign. On the left, there is a search sidebar with fields for 'Date Range' (10/23/2017 - 10/23/2018), 'Full Name', and 'Account Number'. Below these are buttons for 'Advanced Search', 'Active', 'Completed', 'Cancelled', 'Search', and 'Clear'. The main area shows 'Records found: 4 | Loaded: 4 | Selected: 0' and a 'Sort By' button. A table lists four cases:

Case ID	Title Field	Workflow	From	Inbox	Document Set	Step	Status
1	ABHISHEK PATEL	Car Loan	John L. Officer	John L. Officer	CarLoan	Process	Important
2	JOHN SMITH	Car Loan	Joe L. Officer	Joe L. Officer	CarLoan	Start	Locked
3	JOHN SMITH	Car Loan	Jane L. Officer	Jane L. Officer	CarLoan	Start	None
4	ABHISHEK PATEL	Car Loan	Russ W. Administrator	Russ W. Administrator	CarLoan	Start	None



Cases which have been tagged as important will display an exclamation mark (!).
Cases which are currently opened by another user will display a Lock icon.

Cases Page with A Workflow Specified (Administrator Only)

When the Cases page is filtered by Workflow, unlocked sessions may be Re-Routed by the Administrator.

- 1 Select a **Workflow**.
- 2 Select additional paramters as necessary.
- 3 Click **Search**.

The screenshot shows the IMM eSign interface with the following elements:

- Header:** "Cases" with an info icon and "IMM eSign".
- Search Panel (Left):**
 - Date Range:** 11/29/2017 - 11/29/2018
 - Full Name:** Full Name
 - Account Number:** Account Number
 - Platform:** All Platforms
 - Workflow:** Car Loan (highlighted with a red box and circled '1')
 - Inbox:** All Inboxes
 - Document Sets:** All Document Sets
 - Received From:** All Users
 - Users:** All Users
 - Buttons:** Advanced Search, Active, Completed, Cancelled, Search (highlighted with a red box and circled '3'), Clear.
- Records Panel (Right):**
 - Records found:** 5 | Loaded: 5 | Selected: 0
 - Sort By:** (dropdown)
 - Record 1:** Title Field: JOHN SMITH, Workflow: Car Loan, From: John L. Officer, Inbox: John L. Officer, Document Set: CarLoan, Step: Process.
 - Record 2:** Title Field: ABHISHEK PATEL, Workflow: Car Loan, From: John L. Officer, Inbox: John L. Officer, Document Set: CarLoan, Step: Process.
 - Record 3:** Title Field: JOHN SMITH, Workflow: Car Loan, From: Joe L. Officer, Inbox: Joe L. Officer, Document Set: CarLoan, Step: Start.
 - Record 4:** Title Field: JOHN SMITH, Workflow: Car Loan, From: Jane L. Officer, Inbox: Jane L. Officer, Document Set: CarLoan, Step: Start.
 - Record 5:** Title Field: ABHISHEK PATEL, Workflow: Car Loan, From: Russ W. Administrator, Inbox: Russ W. Administrator, Document Set: CarLoan, Step: Start.

The Cases page refreshes.

The screenshot displays the IMM eSign 'Cases' page. On the left is a search sidebar with filters for Date Range (11/29/2017 - 11/29/2018), Full Name, Account Number, Platform (All Platforms), Workflow (Car Loan), Inbox (All Inboxes), Document Sets (All Document Sets), Received From (All Users), and Users (All Users). The main area shows 'Records found: 5 | Loaded: 5' and 'Selected: 0'. A 'Re-Route' button is in the top right. Below the search bar, there are 'Select All' and 'Sort By' buttons. The records list includes:

- Title Field: JOHN SMITH, Workflow: Car Loan, From: John L. Officer, Received: 11/29/2018 02:37 PM, Inboxes: John L. Officer, Document Set: CarLoan, Step: Process, Platform: Lending Documents-[LEND].
- Document Set: CarLoan, Car Loans.
- Title Field: ABHISHEK PATEL, Workflow: Car Loan, From: John L. Officer, Inboxes: John L. Officer, Document Set: CarLoan, Step: Process.
- Title Field: JOHN SMITH, Workflow: Car Loan, From: Joe L. Officer, Inboxes: Joe L. Officer, Document Set: CarLoan, Step: Start.
- Title Field: JOHN SMITH, Inboxes: Jane I. Officer.

At the bottom right, there is a zoom level indicator set to 100%.

Re-Route Cases

To re-route *unlocked* cases,

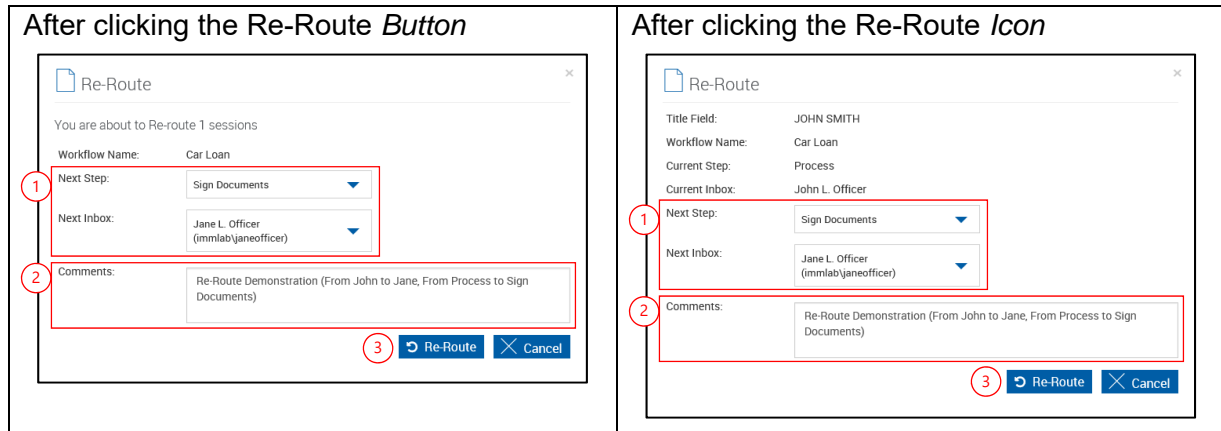
- 1 Check to select. Multiple cases may be rerouted at the same time.
- 2 Click the **Re-Route** button.

- OR -

- 3 Click the Re-Route *icon* to route only the selected case.

The screenshot displays the IMM eSign interface for managing cases. On the left, there is a search and filter sidebar with fields for Date Range, Full Name, Account Number, Platform, Workflow (set to 'Car Loan'), Inbox, Document Sets, Received From, and Users. The main area shows a list of cases with columns for Title Field, Workflow, From, Received, and Platform. A 'Re-Route' button is visible in the top right. A red box labeled '1' highlights a checkbox next to the first case (JOHN SMITH). Another red box labeled '2' highlights the Re-Route icon in the action menu for the same case. Below the case list, there is a 'Documents' section showing document sets like 'AutolinsuranceAgreementNJ' and 'ExpressApplication'.

The Re-Route popup appears.



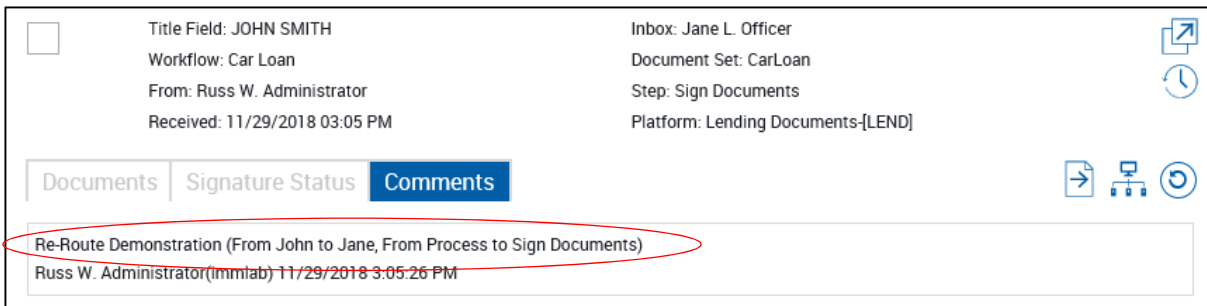
Cases can only be re-routed to a different Step or Inbox *within the current workflow*.

Incorrectly re-routing a case may have undesired results.

- 1 Select the Step, Inbox or both and add comments as required.
- 2 Add a comment (**Required**).
- 3 Click Re-Route.

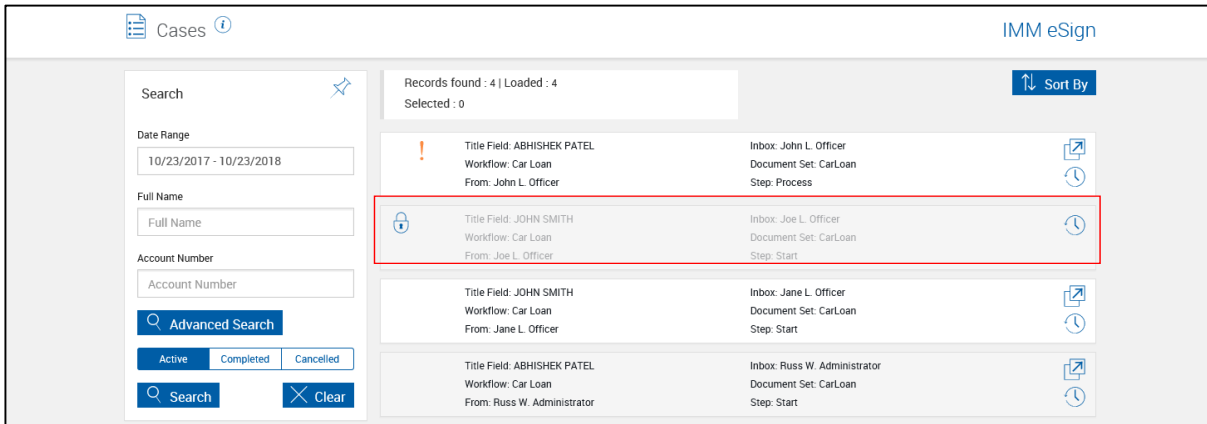
The Cases page refreshes.

The Re-Route Comment is in the comments section for the case.



Unlock Locked Tasks

The Administrator has the ability to unlock tasks currently opened by other users.



On the Cases menu, locked sessions display a Lock icon.

Hover over the Lock icon to see who locked the session and when.

Click on the case to view more information about the case.

Administrators can click the Lock icon to unlock the case.

Loan Coupons (Only when the Loan Coupons Add-On is activated)

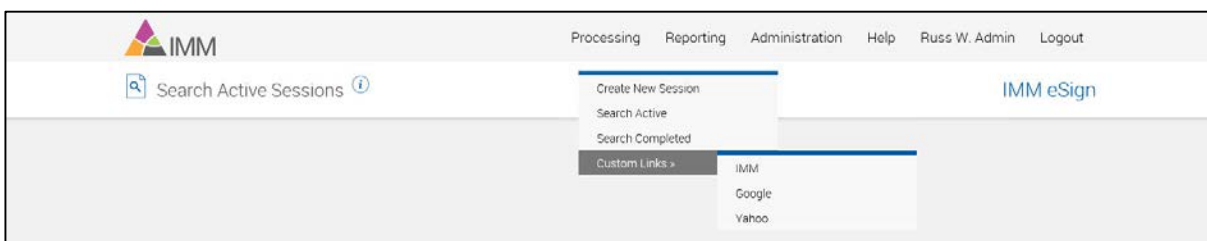
Refer to the User/Document Administrator for details on processing Loan Coupons.

Starter Checks (Only when the Loan Coupons Add-On is activated)

Refer to the User/Document Administrator for details on processing Starter Checks.

Custom Links

Click **Processing > Custom Links >**.



This feature allows the all users to easily navigate to frequently used websites outside of IMM eSign plus. Refer to [Custom Label/URL](#) on page 129.

Reporting

The following sub-menu choices are available:

Session Status

Expiring Sessions (Not available for Workflow)

Audit

Error Details

Login Failures

Transactions (XML/RTS)

Tracking

Status API Notifications

Remote Signature > Status



Remote Signatures > Download Batches

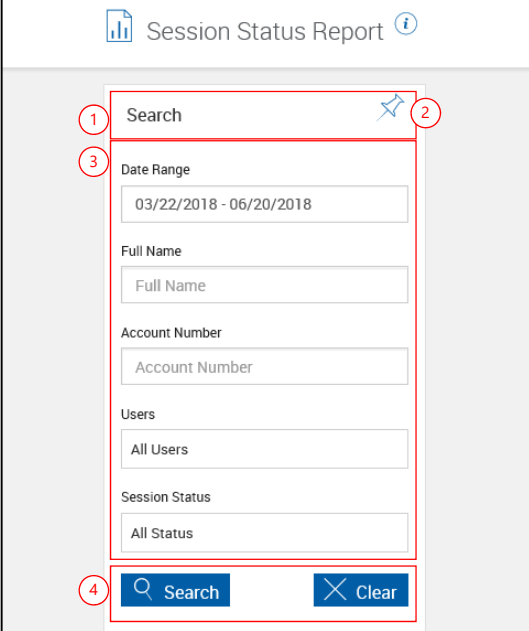
Remote Signatures > Failed Downloads

Session Status

This report displays the status for all active sessions.

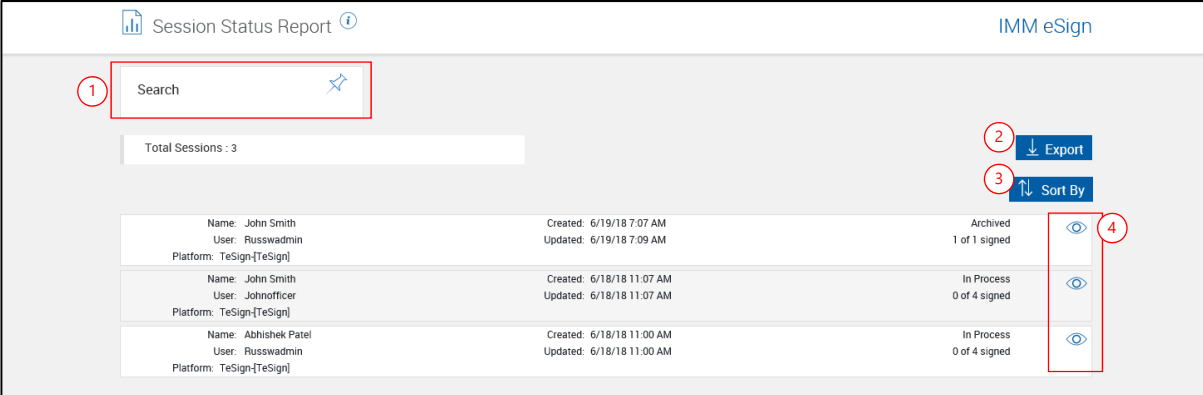
Click **Reporting > Session Status**.

- 1 **Title Bar:** Click the title bar area to expand/minimize the Parameters Input pane.
- 2 **Pin/Unpin:** Click the pin to display  or collapse  the search parameters section of the page when the results are displayed.
- 3 Enter search parameters.
- 4 **Action Buttons:**
 - **Search:** Search session status based on the selected parameters.
 - **Clear:** Close existing report and clear search parameters.







The screenshot shows the 'Session Status Report' form. Callout 1 points to the title bar area. Callout 2 points to the pin/unpin icon in the top right of the search parameters section. Callout 3 points to the search parameters input fields: Date Range (03/22/2018 - 06/20/2018), Full Name, Account Number, Users (All Users), and Session Status (All Status). Callout 4 points to the 'Search' and 'Clear' buttons at the bottom of the form.

When the Session Status Report populates,

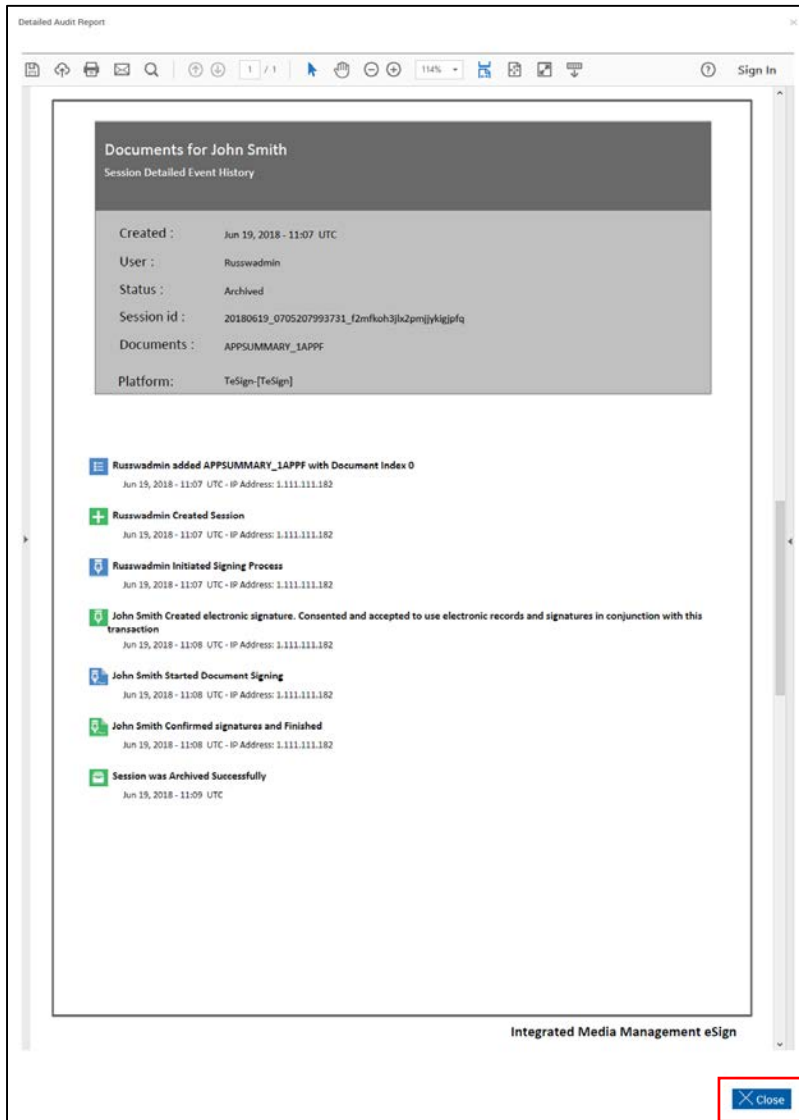


The screenshot shows the populated report. Callout 1 points to the search parameters panel. Callout 2 points to the 'Export' button. Callout 3 points to the 'Sort By' button. Callout 4 points to the preview icons (eye icons) in the table.

Name	User	Platform	Created	Updated	Archived	Preview
John Smith	Russwadmin	TeSign-[TeSign]	6/19/18 7:07 AM	6/19/18 7:09 AM	1 of 1 signed	
John Smith	Johnofficer	TeSign-[TeSign]	6/18/18 11:07 AM	6/18/18 11:07 AM	In Process 0 of 4 signed	
Abhishek Patel	Russwadmin	TeSign-[TeSign]	6/18/18 11:00 AM	6/18/18 11:00 AM	In Process 0 of 4 signed	

- 1 **Search parameters panel:** Click this area to expand the parameters panel.
- 2 **Export:** Export Session Status Report to a .csv file.
- 3 **Sort by:** Select Date Modified or Name, Ascending or Descending.
- 4 **Preview Icons:** Click  to preview the **Detailed Audit Report** for a session.

Detailed Audit Report



Click **Close** to return to the Session Status Report.

About Page – Session Status Report

This feature provides a quick listing of icons and functions available and related to the Session Status Report.

Click the Page Help button.

The screenshot shows the 'Session Status Report' interface. At the top right, there is a help icon (an 'i' in a circle) which is circled in red. A red arrow points from this icon to a help popup window titled 'About Page | Session Status Report'. The popup contains the following information:

This page provides the statuses of all active sessions. Results can be exported in CSV format.

Icons

	Pin	Pin search panel to the screen.
	Unpin	Unpin search panel from the screen.
	Detailed Audit	View audit report.

Expiring Sessions (Not available for Workflow)

This report displays sessions which have not expired.

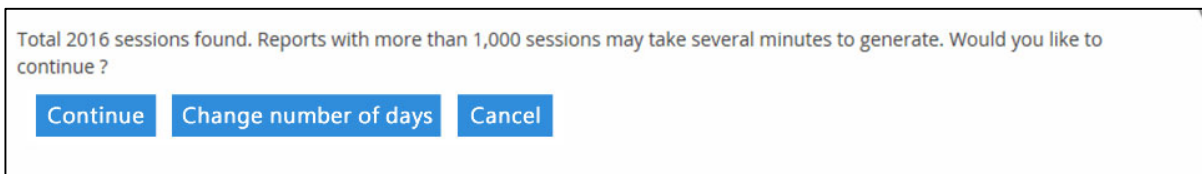
Click **Reporting > Expiring Sessions**.

The screenshot shows the 'Expiring Sessions Report' interface. Three numbered callouts are present:

- 1 Days till expiration: 90
- 2 Owner: [Dropdown menu]
- 3 [Print] [Export]

- 1 Days till expiration:** Include sessions with less than this number of days left before expiration. The default setting is the maximum of **Retain Active Sessions (Days)** on page 132.
- 2 Owner:** Leave this blank to search documents for all owners or filter the search to only include documents from the selected owner.
- 3 Action Buttons:**
 - **Print:** Run the report – opens the Expiring Sessions Report in a PDF popup.
 - **Export:** Export Expiring Sessions Report to a .csv file.

If there are more than 1,000 sessions in the report range, a message will display.



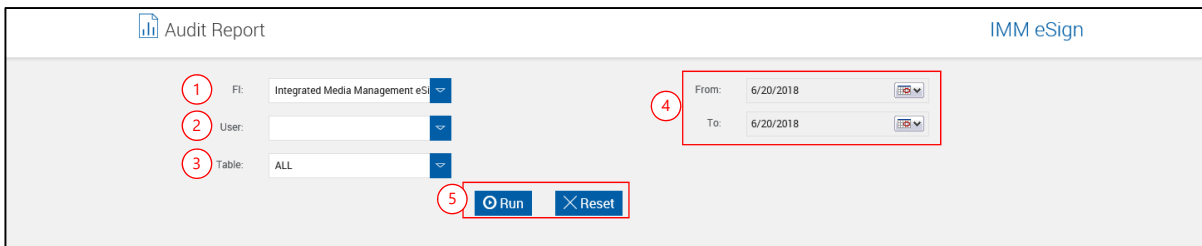
Click **Continue** to generate the report.

Click **Change number of days** or **Cancel** to return to the Saved Sessions Expiration Report screen.

Audit

This report, based on database tables, provides limited tracking of IMM eSign plus activities.

Click **Reporting > Audit Report**.



Enter search criteria.

- 1 **FI:** Only your financial institution will be available.
- 2 **User:** Select a User. Blank will list activities for all users. Individual users can be specifically selected. The IMMAdmin and HostAdmin cannot be selected. [Default: Blank]
- 3 **Table:** Select a database table. [Default: All]
- 4 **From/To Date:** Select a From/To Date for the report. (Refer to [Calendar Popup](#) on page 174.)
- 5 **Action Buttons:**
 - **Run:** Generate the report based on the selected parameters.
 - **Reset:** Close existing report and clear search parameters.

The Audit Report screen refreshes with the report listed on the bottom of the screen.

Audit Report

IMM eSign

FI: Integrated Media Management eSign

User:

Table: ALL

From: 6/20/2018

To: 6/20/2018

11 Run Reset Print

1 Table	2 Column	3 Key	4 FI ID	5 Action	6 Was	7 Became	8 Date	9 Changed By	10 Located At
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 19 2018 10:42AM	Jun 20 2018 6:10AM	6/20/2018 6:10:56 AM	Russ W. Admin	IMMVMRKC2018I
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 6:10AM	Jun 20 2018 6:11AM	6/20/2018 6:11:03 AM	Russ W. Admin	1.111.111.182
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 6:11AM	Jun 20 2018 6:33AM	6/20/2018 6:33:00 AM	Russ W. Admin	IMMVMRKC2018I
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 6:33AM	Jun 20 2018 6:33AM	6/20/2018 6:33:08 AM	Russ W. Admin	1.111.111.182
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 6:33AM	Jun 20 2018 8:36AM	6/20/2018 8:36:40 AM	Russ W. Admin	IMMVMRKC2018I
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 8:36AM	Jun 20 2018 8:36AM	6/20/2018 8:36:45 AM	Russ W. Admin	1.111.111.182
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 8:36AM	Jun 20 2018 11:00AM	6/20/2018 11:00:35 AM	Russ W. Admin	IMMVMRKC2018I
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 11:00AM	Jun 20 2018 11:00AM	6/20/2018 11:00:43 AM	Russ W. Admin	1.111.111.182
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 11:00AM	Jun 20 2018 1:07PM	6/20/2018 1:07:27 PM	Russ W. Admin	IMMVMRKC2018I
Users	LastLogin	RussWAdmin	2	UPDATE	Jun 20 2018 1:07PM	Jun 20 2018 1:07PM	6/20/2018 1:07:33 PM	Russ W. Admin	1.111.111.182

Total records available: 10

Reports are limited to 500 rows of information.



Clicking on **color** column titles sorts the list. Clicking a title alternates between ascending and descending.

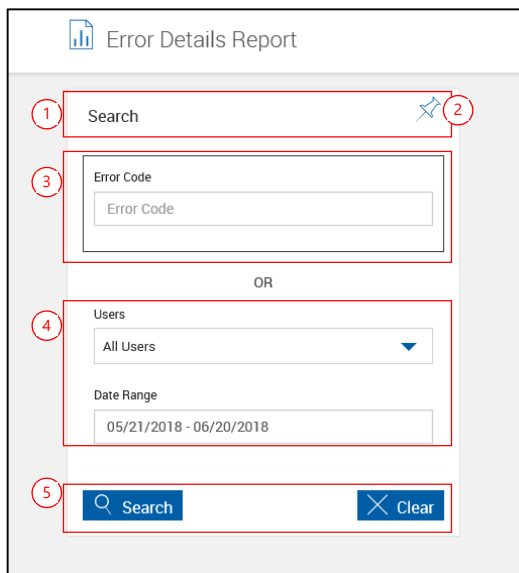
- 1 **Table:** Table storing this row of information.
- 2 **Column:** Column containing this data within the table listed.
- 3 **Key:** Used to identify the row changed within the table listed.
- 4 **FI ID:** Financial Institution ID which has had data modified.
- 5 **Action:** Type of action taken (Insert, Update or Delete).
- 6 **Was:** Previous value for the row which was modified.
- 7 **Became:** New value for the row which was modified.
- 8 **Date:** Date the data was modified.
- 9 **Changed By:** Server Name and Logon Name of the user that modified the data.
- 10 **Located At:** Machine Name or IP Address of the machine used to make the change in data.
- 11 **Action Buttons:**
 - **Run:** Generate the report based on the selected parameters.
 - **Reset:** Close existing report and clear search parameters.
 - **Print:** Display the report in a PDF popup.
 - From the Adobe Menu bar, click the printer icon to print. Close the window when finished.

Error Details

- 1 This report provides a limited listing of errors.

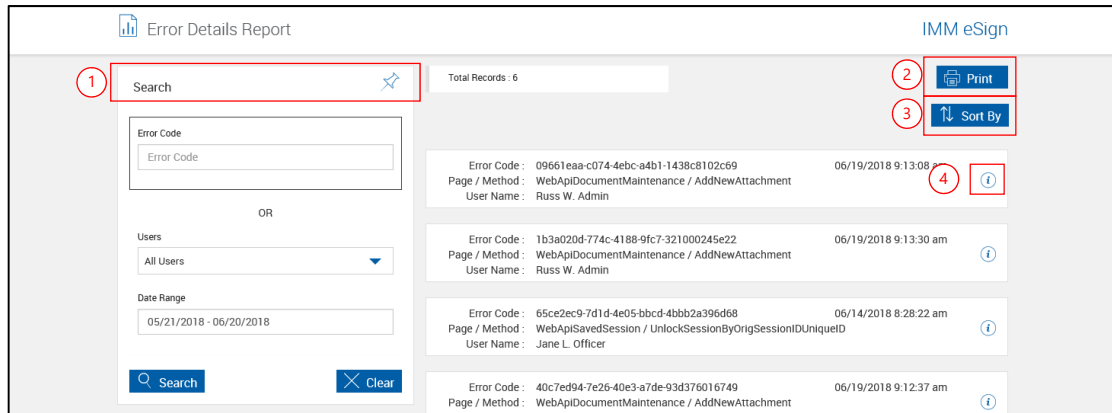
Click **Reporting > Error Details**.


- 1 **Title Bar:** Click the title bar area to expand/minimize the Parameters Input pane.
- 2 **Pin/Unpin:** Click the pin to display  or collapse  the search parameters section of the page when the results are displayed.
- 3 **Error Code:** Enter a specific error code to search for.
- 4 Or search by a combination of User and Date Range.
 - **Users:** Select a User. If left blank, reports for all users will be included.
 - **Date Range:** Select a From/To Date for the report. Click the Date Range text box. (Refer to [Date Range Selection](#) on page 174).
- 5 **Action Buttons:**
 - **Search:** Search session status based on the selected parameters.
 - **Clear:** Close existing report and clear search parameters.



The screenshot shows the 'Error Details Report' interface. At the top, there is a title bar with a bar chart icon and the text 'Error Details Report'. Below the title bar is a search input field labeled 'Search' with a pin icon on the right, indicated by callout 1 and 2. Underneath is a section for 'Error Code' with a text input field, indicated by callout 3. Below that is an 'OR' separator. The next section is for 'Users' with a dropdown menu showing 'All Users', indicated by callout 4. Below the dropdown is a 'Date Range' text box containing '05/21/2018 - 06/20/2018'. At the bottom, there are two buttons: a blue 'Search' button with a magnifying glass icon and a blue 'Clear' button with an 'X' icon, both indicated by callout 5.

2 After clicking **Search**,
The Error Details Report refreshes.



- 1 **Title Bar:** Click the title bar area to expand/minimize the Parameters Input pane.
- 2 **Print:** Display the report in a PDF popup. If an Error Code is entered, that code is listed; if no parameters are listed, the report will contain a listing of all current error codes for your FI.
 - From the Adobe Menu bar, click the printer icon to print. Close the window when finished.
- 3 **Sort by:** Click to select the sort order.
- 4 **Info icon:** Click  for Error Details.

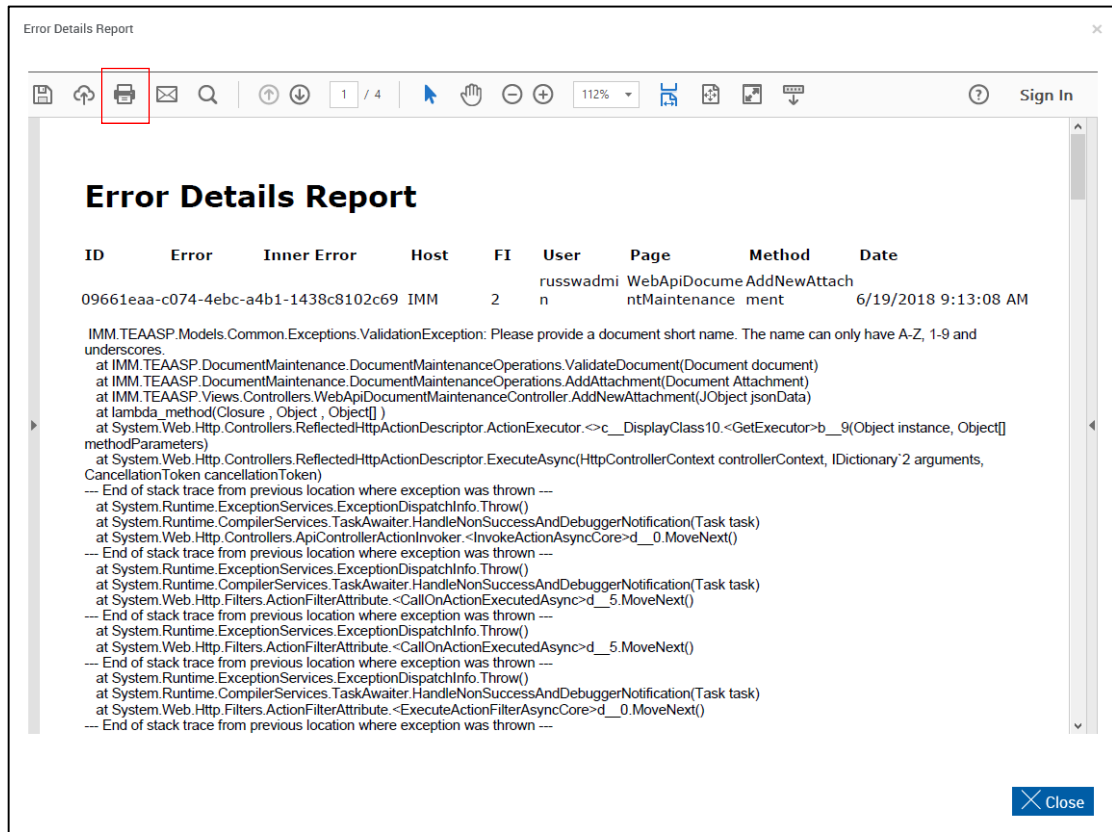
3



Click **Close** to return to the Error Details Report.

4 After clicking **Print**,

The Error History Report appears with detailed information about the error code(s).



Click the Print icon to print the report.

Click **Close** to return to the Error Details Report.

Login Failures



This report may not populate for your installation.

- 1 This report provides a limited listing of errors incurred during login.

Click **Reporting > Login Failures**.

- 1 **Title Bar:** Click the title bar area to expand/minimize the Parameters Input pane.

- 2 **Pin/Unpin:** Click the pin to display or collapse the search parameters section of the page when the results are displayed.

- 3 **Users:** Select a User. If left blank, reports for all users will be included.

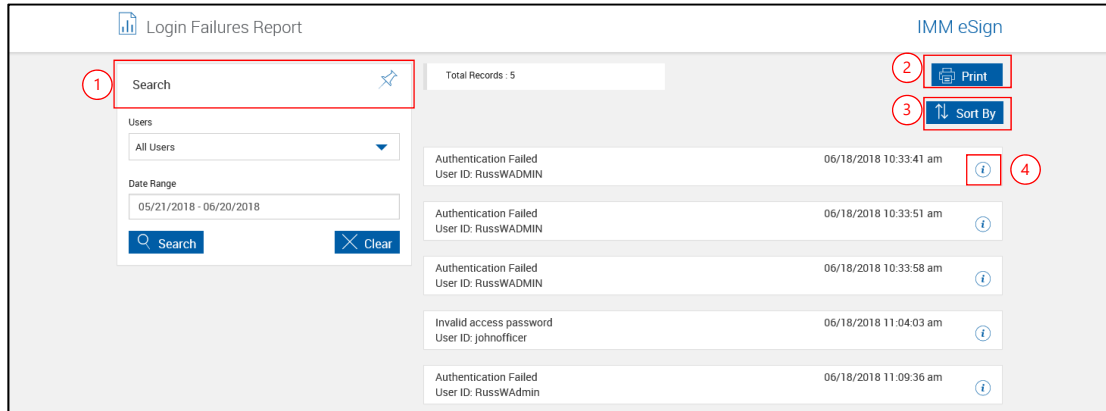
- 4 **Date Range:** Select a From/To Date for the report. Click the Date Range text box. (Refer to [Date Range Selection](#) on page 174).


- 4 **Action Buttons:**

- **Search:** Search login failures based on the selected parameters.
- **Clear:** Close existing report and clear search parameters.

The screenshot shows the 'Login Failures Report' interface. It features a title bar at the top with a bar chart icon and the text 'Login Failures Report'. Below the title bar is a search input field labeled 'Search' with a magnifying glass icon and a pin icon. Below the search field is a dropdown menu labeled 'Users' with 'All Users' selected. Below the dropdown is a date range input field labeled 'Date Range' with the text '05/21/2018 - 06/20/2018'. At the bottom are two buttons: a blue 'Search' button with a magnifying glass icon and a blue 'Clear' button with an 'X' icon. Red circles with numbers 1 through 5 are overlaid on the interface to indicate the steps described in the text: 1 points to the title bar, 2 points to the pin icon, 3 points to the Users dropdown, 4 points to the Date Range text box, and 5 points to the Search and Clear buttons.

2 After clicking **Search**, The Login Failure Report refreshes.



- 1 Title Bar:** Click the title bar area to expand/minimize the Parameters Input pane.
- 2 Print:** Display the report in a PDF popup. If an Error Code is entered, that code is listed; if no parameters are listed, the report will contain a listing of all current error codes for your FI.
 - From the Adobe Menu bar, click the printer icon to print. Close the window when finished.
- 3 Sort by:** Click to select the sort order.
- 4 Info icon:** Click  for Login Failure Details.

3



Click **Close** to return to the Error Contents Report.

Transactions (XML/RTS)



i This report is not available for Workflow installations.

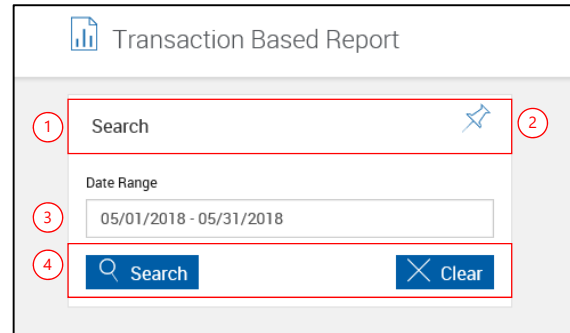
- 1 To allow for transaction-based billing, this report provides data specifying the number of transactions processed in your system with a high-level summary and supporting details. By default, the date range of the Transaction Based Report is the *previous month*.

The availability of this report is controlled by Host Administrator settings.

Click **Reporting > Transactions**.

Enter search criteria.

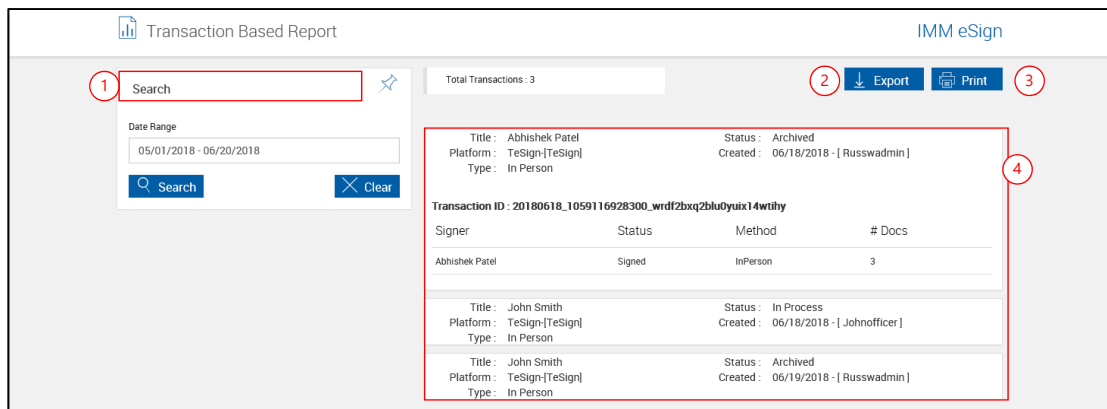
- 1 **Title Bar:** Click the title bar to collapse or expand the search parameter section.
- 2 **Pin:** Click the pin to display  or collapse  the search parameters section of the page, when the results display.
- 3 **Date Range:** Select a From/To Date for the report. Click the Date Range text box. (Refer to [Date Range Selection](#) on page 174). [Default: Previous Month]
- 4 **Action Buttons:**
 - **Search:** Search error details based on the selected parameters.
 - **Clear:** Close existing report and clear search parameters.



If no criteria are entered, all tracked transactions are returned.

2 After clicking **Search** with no parameters, The Transaction Based Report repopulates.

- 1 Click the title bar to display/hide the search parameters panel *and display the Print button.*
- 2 Click the export button to export to a .csv file.
- 3 Click the print button to display the report in a PDF popup. All transactions will be expanded in the printed report.
 - From the Adobe Menu bar, click the printer icon to print. Close the window when finished.
- 4 Click a transaction to view expanded transaction details.



Exporting

After clicking the Export button, a popup appears.



Click **Save** to save the comma-delimited export with default options.

Click **Save as** to change the name or location of the .csv file.

Click **Save and open** to save the comma-delimited export with default options and open in a separate application. (Not available if no associated application is available.)

FName	CreatedDt	OrigSessionID	SessionStatus	UserID	Title	Platform	SessionTy	NumberOfSigners	InPersonSigned	InPersonUnsigned	RemoteSigned	RemoteUnsigned	RemoteSigningStatus
Integrated Media Management eSign	7/2/2018 7:43	20180702_0742436158619_ppo43ho2ucpbrheao3waxl	In Process	Janeofficer	John Smith	TeSign-Tr in Person		1	0	1	0	0	
Integrated Media Management eSign	7/2/2018 8:19	20180702_0819158629549_ppo43ho2ucpbrheao3waxl	In Process	Janeofficer	John Smith	TeSign-Tr in Person		1	0	1	0	0	
Integrated Media Management eSign	7/2/2018 8:27	20180702_0820061909356_ppo43ho2ucpbrheao3waxl	In Process	Janeofficer	John Smith	TeSign-Tr in Person		2	1	1	0	0	
Integrated Media Management eSign	7/2/2018 8:31	20180702_0831427845388_ppo43ho2ucpbrheao3waxl	In Process	Janeofficer	John Smith	TeSign-Tr in Person		3	0	3	0	0	
Integrated Media Management eSign	7/2/2018 8:36	20180702_0836249759913_ppo43ho2ucpbrheao3waxl	In Process	Janeofficer	John Smith	TeSign-Tr in Person		3	1	2	0	0	
Integrated Media Management eSign	7/2/2018 8:32	20180702_083212696927_ppo43ho2ucpbrheao3waxl	Sent For Imaging	Janeofficer	John Smith	TeSign-Tr in Person		2	2	0	0	0	
Integrated Media Management eSign	7/2/2018 9:36	20180702_0936049125530_ppo43ho2ucpbrheao3waxl	Remote Session Expired	Janeofficer	John Smith	TeSign-Tr Remote		2	0	0	0	2	Expired
Integrated Media Management eSign	7/3/2018 8:39	20180703_0839241096389_ppo43ho2ucpbrheao3waxl	In Process	Janeofficer	Abhishek Patel	TeSign-Tr in Person		1	0	1	0	0	
Integrated Media Management eSign	7/3/2018 14:47	20180703_1415388817734_SqHqj441dxxu4rcqrbm3z	In Process	Janeofficer	John Smith	TeSign-Tr in Person		2	0	2	0	0	
Integrated Media Management eSign	7/13/2018 7:58	20180713_0757804309183_1flhvze3maon05c1gbotore	In Process	Russwadmin	Abhishek Patel	TeSign-Tr in Person		1	0	1	0	0	
Integrated Media Management eSign	7/13/2018 9:38	20180713_09337578022_mkap05eed2fveaojwifbnn	In Process	Janeofficer	John Smith	TeSign-Tr in Person		2	0	2	0	0	
Integrated Media Management eSign	7/17/2018 8:02	20180717_0802362952421_mkap05eed2fveaojwifbnn	In Process	Janeofficer	John Smith	TeSign-Tr in Person		2	0	2	0	0	

After opening, the information can be manipulated using standard worksheet methods.

Tracking



This report ***only*** lists **legacy events** - events related to sessions created in previous versions.

This report may not display for your installation.

Current version events are listed in the [Session Status](#) (page 39).

Events Tracked

Events related to sessions created in previous versions are optionally recorded in the Tracking database. Only checked events will be tracked. Refer to [Tracking Tab](#) on page 140 for setting tracked events.

Print Preview	Save Session	Work Queue Transfers ¹
Process document(s)	Retrieve Session	Send for Secure Delivery ²
Archive document(s)	Delete Session	Submit for Secure Digital Signatures ²

¹ - Only appears if [Enable Work Queue Transfers](#) (page 133) is checked.

² - Only appears if the Remote Signatures add-on is activated.

Click **Reporting > Tracking Report**.



As an Administrator, you can search all events and all users by leaving all input boxes blank. The index/search fields used in this guide are sample fields only. Your search fields may differ.

The index/search fields that display depend on the index fields that have been defined in TotaleSign Admin Index Manager. Refer to View/Edit Index Types or Define Custom Index Types in the TotaleSign Admin Index Manager Administrator Guide.

Tracked events displayed will show events for all dictionaries.

The screenshot shows the 'Document Event Tracking Report' interface. It features a title bar (1) with a collapse/expand icon. Below it is a 'Select Dictionary' dropdown (2) set to 'TeSign Documents (TeSign)'. To the right are 'Start Date' and 'End Date' fields (3) with calendar icons, showing dates 3/23/2018 and 6/20/2018 respectively. Below these are three 'Index Fields Textboxes' (4) for 'Full Name', 'Account Number', and 'Customer Number'. A section for 'Additional Search Fields' (5) includes a dropdown for 'Tax Identification Number' and an 'Add Search Field' button. A 'User' dropdown (6) is followed by a 'Lookup' button. An 'Events' dropdown (7) is open, showing options: 'ALL', 'Archive document(s)', and 'Delete session'. At the bottom are 'Search' (8) and 'Clear' buttons. A message at the bottom states 'No sessions found matching search criteria.'

1 **Panel Title Bar**/∨/∧: Clicking in the title bar will collapse and expand the parameter section.

Enter search parameters.

2 **Select Dictionary**: Preset to TeSign Documents (TESIGN).

3 **Start/End Date**: Click the Calendar button to open the **Calendar Popup** (page 174).

4 Enter any additional search criteria in the index field textboxes. Refer to **Search Hints** on page 172.

5 **Additional Search Fields**: Select additional index search fields as necessary.

6 **User**: Leave this blank to search documents for all users or filter the search to only include documents from the selected user. Refer to the **Using the Lookup Area** explanation on page 172 for more information.

7 **Events**: Search All (default) events, or search a single event from the drop-down list.

8 **Action Buttons**:

- **Search**: Performs a search based on the selected parameters.
- **Cancel**: Clears all parameters.

The screen refreshes with the report listed on the bottom of the screen.

Document Event Tracking Report

Document Event Tracking:

Select Dictionary: TeSign Documents (TeSign) Start Date: 3/23/2018 End Date: 6/20/2018

Customer Name: Customer Number: Date Started: Taxpayer ID Number:

Additional Search Fields: Account Number + Add Search Field

User: Lookup Events: ALL, Archive document(s), Delete session

Displaying sessions 1 through 10 from recordset 1 - 69. Total records available: 69

Customer Name	Customer Number	Date Started	Taxpayer ID Number	Document Name	Display	Action Taken	Date Created	Created By
John Smith	11223344	06-01-2015	000-98-1234		False	Delete session	6/6/2018 3:00:05 AM	Immadmin
John Smith	11223344	03-23-2013	000-98-1234		False	Delete session	6/6/2018 3:00:05 AM	Immadmin
John Smith	11223344	06-01-2015	000-98-1234		False	Delete session	6/6/2018 3:00:05 AM	Immadmin

Index Fields Region

These fixed field names and results will always display.

Reports are limited to 500 rows of information.

The default view is all events are listed for all dictionaries.

This list can be sorted by clicking on **Column Titles**. Subsequent clicks alternate between ascending and descending order. The default sort order is oldest transaction last (Last Modified Date/Time Descending).

- 1 **Index Fields Region:** These names vary by installation.
- 2 **Document Name:** Name of the document.
- 3 **Display:** True or False. True indicates the document displayed during processing. False indicates the document did not display during processing.
- 4 **Action Taken:** Refer to [Events Tracked](#) on page 52 for a list of tracked events.
- 5 **Date Created:** Date the document was created.
- 6 **Created by:** Server and Login name of user that created the document.

Two new action buttons, Preview and Preview All, have been added.

Click **Preview** or **Preview All** to view a printable PDF version of this report.

Preview All will display if the event tracking list exceeds the normal number of records.

The Document Event Tracking PDF opens in a separate window.

Click the Print icon to print the report.

Close the window when done.

Add-Ons



These reports are only available if the Starter Checks or Loan Coupons add-on is activated.

This report lists any activities (Starter Checks/Loan Coupons *created*) in the current reporting period.

Click **Reporting > Add-Ons**.

The Add-Ons Report screen appears.

- 1 Select the **Add-On Type** (Starter Checks or Loan Coupons).

The screenshot shows the 'Add-Ons Report' interface. At the top left is a document icon and the text 'Add-Ons Report'. At the top right is the 'IMM eSign' logo. The main content area contains a form with the following elements:

- 'Add-On Type': A dropdown menu with a blue arrow, highlighted by a red box and a circled '1'.
- 'Search By': A dropdown menu with a blue arrow.
- 'Value': A text input field.
- 'Run': A blue button.

The Add-Ons Report screen refreshes.

- 1 Select the **Search By** criteria.
- 2 Enter a **search string** into the **Value** text box. (Wildcards are acceptable - minimum value is the asterisk (*) and one additional character.)
- 3 Select a **user** for **Created By**.
- 4 Click **Run**.

The screenshot shows the 'Add-Ons Report' interface after refresh. At the top left is a document icon and the text 'Add-Ons Report'. At the top right is the 'IMM eSign' logo. The main content area contains a form with the following elements:

- 'Add-On Type': A dropdown menu with a blue arrow, showing 'Loan Coupons'.
- 'Search By': A dropdown menu with a blue arrow, showing 'Member Name', highlighted by a red box and a circled '1'.
- 'Value': A text input field, highlighted by a red box and a circled '2'.
- 'Created By': A dropdown menu with a blue arrow, showing 'ALL', highlighted by a red box and a circled '3'.
- 'Run': A blue button, highlighted by a red box and a circled '4', with a red arrow pointing to it.

The Add-Ons Report screen refreshes listing all activity for that specific search criterion.

Starter Checks Add-On Results

Add-Ons Report
IMM eSign

Add-On Type: Starter Checks

Search By: Member Name

Value: J*

Created By: ALL

Run

Member #	Member/Joint Member	Address	Run Time	Starting #	Checks Printed	Created By
11223344	John Smith, Jane Smith	415 Home Sreet	9/4/2017 11:23:50 AM	1	12	Jane Officer
11223344	John Smith, Jane Smith	415 Home Sreet	9/14/2018 1:46:57 PM	13	24	Jane Officer

Total records available: 2 Sorted by: Run Time (DESC)

Loan Coupons Add-On Results

Add-Ons Report
IMM eSign

Add-On Type: Loan Coupons

Search By: Member Name

Value: a*

Created By: ALL

Run

Loan Number	Applicant/CoApplicant	Address	AmountIDue	LastPymnt Amt	Period	Run Time	Starting #	CouponsPrinted	Created By
143	Abhishek Patel	645 His Street, Linden, NJ 07036	200.00	200.00	Monthly	9/6/2018 3:25:49 PM	5	2	Russwadmin
143	Abhishek Patel	645 His Street, Linden, NJ 07036	200.00	200.00	Monthly	9/6/2018 3:18:52 PM	1	1	Johnofficer

Total records available: 2 Sorted by: Run Time (DESC)

Clicking on color column titles sorts the list. Clicking the title alternates between ascending and descending.

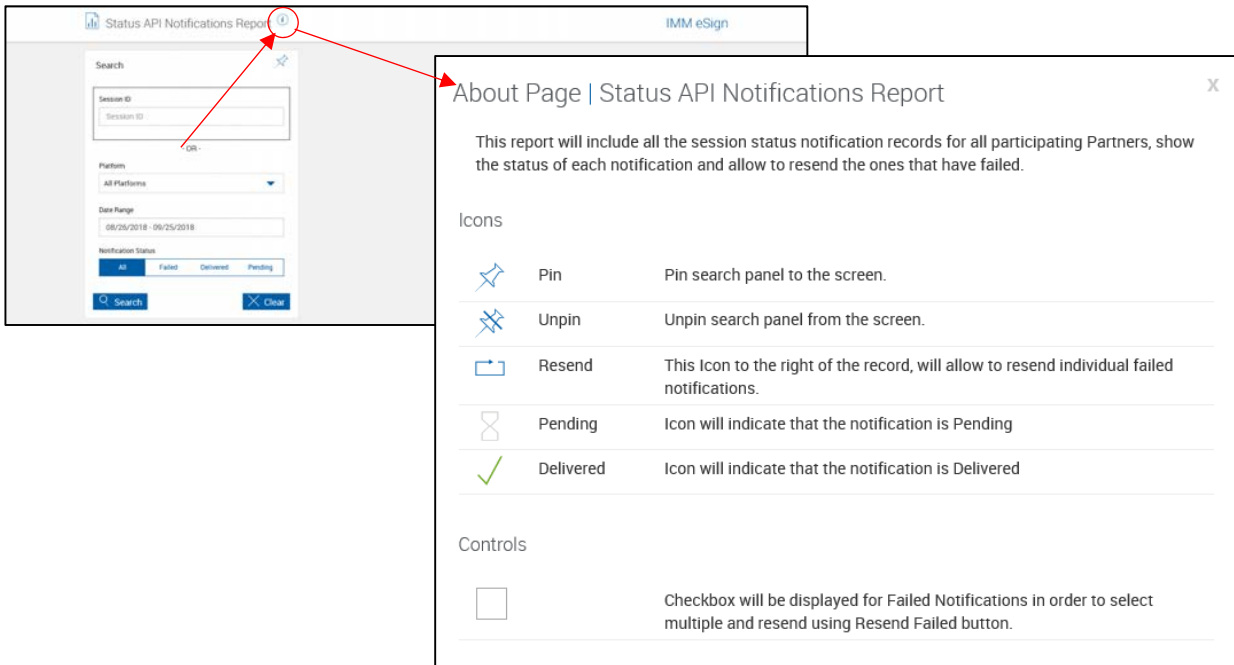
Status API Notifications

About Page – Status API Notifications Report

Click **Administration > Status API Settings**.

The Help button provides a quick listing of icons and functions available and related to the New Session page.






Click the Page Help button.



The image shows a screenshot of the 'Status API Notifications Report' page in the IMM eSign application. A red circle highlights a help icon (a question mark) in the top right corner of the page. A red arrow points from this icon to a help popup window. The popup window is titled 'About Page | Status API Notifications Report' and contains the following text:

This report will include all the session status notification records for all participating Partners, show the status of each notification and allow to resend the ones that have failed.

Icons

-  Pin: Pin search panel to the screen.
-  Unpin: Unpin search panel from the screen.
-  Resend: This Icon to the right of the record, will allow to resend individual failed notifications.
-  Pending: Icon will indicate that the notification is Pending
-  Delivered: Icon will indicate that the notification is Delivered

Controls

- Checkbox will be displayed for Failed Notifications in order to select multiple and resend using Resend Failed button.

Status API Notifications



This item may not be functional for your installation.

This report lists Session Status changes automatically when there is a change in Session status and creates a record in the associated database table. You have the option of

- Searching by Host Session ID, or
- Searching by more detailed information, including Partner, Date Range and Notification Status (all 3 are required).

Click **Reporting > Status API Notification**.

- 1 Minimize/Maximize parameters panel.
- 2 **Session ID:** This is the Session ID as shown in the **Detailed Audit Report** on page 40.
- 3 **Platform:** Select a platform from the drop-down menu, previously referred to as a dictionary.
- 4 **Date Range:** Select a From/To Date for the report. Click the Date Range text box. (Refer to **Date Range Selection** on page 174).
- 5 **Notification Status:** Select the status using the slider.
- 6 **Action Buttons:**
 - **Search:** Generate the report.
 - **Clear:** Close existing report and clear search parameters.

The Status API Notifications Report updates with the results of the search.

Session ID	Platform	Date/Time	Status
201806290904264439032_dph41bpdv2vtdabwfpxxpr	TeSign	06/29/18 01:12 PM	Archived
201806290854493404834_dph41bpdv2vtdabwfpxxpr	TeSign	06/29/18 01:02 PM	Archived
201806281446421774898_dph41bpdv2vtdabwfpxxpr	TeSign	06/29/18 06:00 AM	Expired
201806281236007623853_dph41bpdv2vtdabwfpxxpr	TeSign	06/29/18 06:00 AM	Expired
201806281446421774898_dph41bpdv2vtdabwfpxxpr	TeSign	06/29/18 06:00 AM	Expired
201802271416095956181_c11kinjzxx2z03aowmlwat40	TeSign	06/25/18 08:25 PM	Sent For Imaging
201802271332549564674_c11kinjzxx2z03aowmlwat40	TeSign	06/25/18 08:25 PM	Sent For Imaging
201806281245522572710_dph41bpdv2vtdabwfpxxpr	TeSign	06/28/18 06:25 PM	Archived

Click any session to view additional information.

Additional information is available after expanding sessions.

Remote Signature > Status

Remote Signature > Status (Non-Workflow)



This report is only available if the Remote Signature Add-On is activated.

This report displays the status of all outstanding Remote Signature sessions. Remote Signature sessions that have been completed and cleared by the FI will not display.

Click **Reporting > Remote Signature > Status**.

DocumentSet Name	Status	Date Submitted	Member Name	Loan Number	Created By
AdhocDocs	ACCEPTED	6/29/2018 9:17:33 AM	Cinderella SA Princess Sr	000-98-1234	Administrator

- Panel Title Bar**/∨/∧: Click the title bar to collapse and expand the parameter section.
- Select Platform**: Select a platform, previously referred to as a dictionary.
- Exclude Aborted/Expired Sessions**: When selected aborted and expired sessions will not be included in the results.

- 4 **Include Downloaded Sessions that were submitted in the past # of Days:** Limit the listing to include downloaded sets for up to 14 days. This setting is based on the Date Submitted field and only applies to downloaded documents.
- 5 **Index Fields Input Region:** Enter any additional search criteria in the index field textboxes.
- 6 **User:** Select a User. Blank will list activities for all users. Individual users can be specifically selected. [Default: Blank]
- 7 **Additional Search Fields:** Select additional index search fields as necessary. Refer to [Add Additional Search Fields](#) on page 173.
- 8 **Action Buttons:**
 - **Search:** Search download batches based on the selected parameters.
 - **Clear:** Close existing report and clear search parameters.
- 9 **Document Set Name:** Document Set Name.
- 10 **Signer Info Icon (👤):** Displays the Signature Status Popup.
- 11 **Status:** Current status of the document set based on the signature status.
 - Waiting for signature
 - Pending other signers
 - Remotely Signed
 - Completed
 - Expired
- 12 **Date Submitted:** Date the document set was submitted for remote signature.
- 13 **Index Fields Listing Region:** These names vary by installation.
- 14 **Created By:** User ID of the person that created the document or document set.

Email	Status
johns@homeemail.com	Waiting for Signature
janes@homeemail.com	Pending Other Signers

Remote Signature > Status (Workflow)



This report is only available if the Remote Signature Add-On is activated.

This report displays the status of all outstanding Remote Signature sessions. Remote Signature sessions that have been completed and cleared by the FI will not display.

Click **Reporting > Remote Signature > Status**.

Remote Signature Status Report
IMM eSign

1 Search Filters

2 Include Downloaded Document Sets that have been submitted in past # of Days :

3

4
 Document Sets
 5
 Created By

6

No records Available

- 1 **Panel Title Bar:** Click the title bar to collapse and expand the parameter section.
- 2 **Include Downloaded Sessions that were submitted in the past # of Days:** Limit the listing to include downloaded sets for up to 14 days. This setting is based on the Date Submitted field and only applies to downloaded documents.
- 2 **Select Platform:** Select a platform, previously referred to as a dictionary.
- 3 **Index Fields:** Input filter criteria.
- 4 **Document Sets:** Click to choose applicable documents or sets.
- 5 **Created By:** Click to filter the results by creator name.
- 6 **Action Buttons:**
 - **Search:** Search download batches based on the selected parameters.
 - **Clear:** Close existing report and clear search parameters.

Remote Signatures > Download Batches



This menu is only available if the Remote Signatures Add-On is activated.

This report lists all batches of files downloaded from the document delivery system. These are documents that have been completed and signed by all parties.

Click **Reporting > Remote Signatures > Download Batches**.

Download Batches Report

IMM eSign

1 Search Parameters:

2 Start Date: 6/29/2018 End Date: 6/29/2018

3 Search Clear Print

4 Displaying records: 1 through 6 of recordset 1 - 6. Total records available: 6

4 Date Downloaded	5 Description	6 Success	7 Form	8 File Name
Batch - XPTTestSet (for Cinderella SA Princess Sr) - downloaded on 06/29/2018				
06/29/2018 09:11:51	XPTTestSet (for Cinderella SA Princess Sr)	True	Application_with_CC_AXX127-AFD731	20180629_0911540994136_1.pdf
			ViewAttachment	20180629_0911541054187_2.pdf
Batch - Document Set (for Dr.Hanibal NIJAD) - downloaded on 06/29/2018				
06/29/2018 02:00:17	Document Set (for Dr.Hanibal NIJAD)	True	AAuto-Loan-Application-RS-AFD731	20180629_0200205873179_1.pdf
			AAuto-Loan-Application-RS-AFD731	20180629_0200205903119_2.pdf
			AAuto-Loan-Application-RS-AFD731	20180629_0200205933126_3.pdf
Batch - Document Set (for Jonathan L WILLIAMS) - downloaded on 06/29/2018				

- 1 Panel Title Bar/√/∧:** Click the title bar to collapse and expand the parameter section.
- 2 Start/End Date:** Click the text box to open the [Calendar Popup](#) (page 174).
- 3 Action Buttons:**
 - **Search:** Search download batches based on the selected parameters.
 - **Clear:** Close existing report and clear search parameters.
 - **Print:** Display the report in a PDF popup. (Only appears when results are available.)
 - From the Adobe Menu bar, click the printer icon to print. Close the window when finished.
- 4 Date Downloaded:** The date this document set was downloaded from the document delivery system. The document set, at that point, will be completed with all required signatures included.
- 5 Description:** Document set name listed with primary applicant name showing. (Secondary and Co-Applicant names will not display.)
- 6 Success:** True or False. True indicates the document set was processed and downloaded to the server. False indicates there was a problem trying to download the set. Refer to [Remote Signatures > Failed Downloads](#) on page 63 for more information.
- 7 Form:** Document names included in this document set.
- 8 File Name:** Name of the PDF which contains all documents in the set.

Remote Signatures > Failed Downloads



IMM recommends this report be run on a regular basis.

Please **Contact IMM** if your report shows failures.

This menu is only available if the Remote Signatures Add-On is activated.

This report lists any batches that failed to download from the document delivery system or downloaded incorrectly.

Click **Reporting > Remote Signatures > Failed Downloads**.

Date Submitted	Date Downloaded	Description	Form	Status Description
07/05/2018 14:21:16	07/05/2018 14:41:14	Document Set (for David Hoofnagle)	Guaranty-Agreement-RS-AFD731	Failed

- 1 **Panel Title Bar**/v/\^: Click the title bar to collapse and expand the parameter section.
- 2 **Start/End Date**: Click the text box to open the **Calendar Popup** (page 174).
- 3 **Action Buttons**:
 - **Search**: Search download batches based on the selected parameters.
 - **Clear**: Close existing report and clear search parameters.
 - **Print**: Display the report in a PDF popup. (Only appears when results are available.)
 - From the Adobe Menu bar, click the printer icon to print. Close the window when finished.
- 4 **Date Submitted**: The date this document set was submitted for signatures.
- 5 **Date Downloaded**: The date this document set was downloaded from the document delivery system. The document set, at that point, will be completed with all required signatures included.
- 6 **Description**: Document set name listed with primary applicant name showing. (Secondary and Co-Applicant names will not display.)
- 7 **Form**: Document names included in this document set.
- 8 **Status Description**: This column displays results of Remote Signatures querying the document delivery system.
 - **Success**: Remote Signatures was able to successfully query the document delivery system about the document set listed under the Description column.
 - **Failed**: Remote Signatures was not able to successfully query the document delivery system about the document set listed under the Description column.

Administration

The following sub-menu choices are available:

Documents – (XML) (This menu item may not display for your installation.)

Documents – (RTS) (This menu item may not display for your installation.)

Document Sets

Criteria

Index Fields

Reindex Documents

Dictionaries

Users

General Settings

Imaging Systems

eSignature

Remote Attachment Template

Change Theme (This menu item may not display for your installation.)

Status API Settings

Scanner

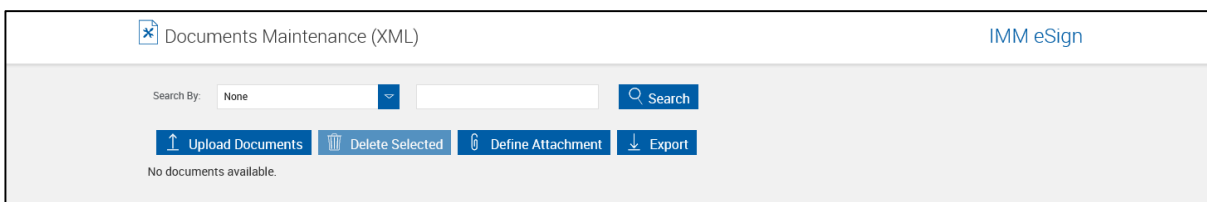
Documents – (XML) - Documents Maintenance

The Document Maintenance page allows the Administrator to change descriptions, criteria and other settings for individual documents.

The Administrator can use this page to upload, edit and delete documents. The Document Maintenance page can also be used to link documents to a specific host dictionary, set the default display flags, assign criteria to a document and set the recurrence type.

Click **Administration > Documents**.

Document Maintenance Page - No Documents



The screenshot shows the 'Documents Maintenance (XML)' page in the IMM eSign application. The page title is 'Documents Maintenance (XML)' and the user is logged in as 'IMM eSign'. The search bar is set to 'None' and has a search button. Below the search bar are four action buttons: 'Upload Documents', 'Delete Selected', 'Define Attachment', and 'Export'. The message 'No documents available.' is displayed at the bottom of the page.

Document Maintenance Page – With Documents

Documents Maintenance (XML) IMM eSign

1 Search By: None

2

3 1 2


	4	5	6	7	8	9	10	11	12	13	14	15
	Document Name	Description	Dictionary	Criteria	Recurring Type	Display While Processing	Eject Vault Document	Show App in App Section	Archived Document	Attachment	Vendor	
Edit <input type="checkbox"/>	AutoInsurance	Attachment - Scanned Auto Insurance	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	
Edit <input type="checkbox"/>	AutoInsuranceAgreementNJ.pdf	Auto Insurance Agreement NJ	LEND	NJ State	NonRecurring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	AutoInsuranceAgreementNY.pdf	Auto Insurance Agreement NY	LEND	NY State	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	AutoInsuranceAgreementOR.pdf	Auto Insurance Agreement OR	LEND	OR State	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	AutoLoanApplication.pdf	Auto Loan Application	LEND	None	NonRecurring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	CreditCardApplicationAXC000.pdf	Credit Card Application AXC000	MBR	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	CreditInsurance.pdf	Credit Insurance	LEND	None	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	DriversLicense	Attachment - Scanned Driver's License	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	
Edit <input type="checkbox"/>	ExpressApplication.pdf	Express Application	LEND	None	NonRecurring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	
Edit <input type="checkbox"/>	GAPInsuranceAgreement	Attachment - GAP Insurance Agreement	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CUNA	

Displaying documents: 1 through 10. Total documents available: 16

Document Maintenance Page - Settings

- 1 **Search by:** A search filter is available to assist in locating your documents. Refer to [Search \(for Documents\)](#) on page 73 for more information.
- 2 **Document Maintenance Action Buttons:**
 - **Upload Documents:** Upload documents. Existing documents with the same name will be overwritten. Refer to [Uploading XML Documents](#) on page 67 for more information.
 - **Delete Selected:** Delete selected documents. Refer to [Deleting Documents](#) on page 72 for more information.
 - **Define Attachment:** Define an attachment category. Refer to [Attach Documents](#) on page 70 for more information.
 - **Export:** Export a comma delimited file listing document information from this page.
- 3 **Page Control:** Lists the number of pages for documents. Each page lists 10 documents. Click the number to jump to that page.
- 4 **Document Selection:** Select individual or all documents for deletion.
- 5 **Document Name:** The name of the document. The name cannot be changed on this page. Refer to [Edit \(Documents\) \(Alternate Method\)](#) on page 74 for more information.
- 6 **Description:** Document Description (150 characters maximum)
- 7 **Dictionary:** Select a Dictionary type. If the document has already been assigned to a Document Set, this field cannot be edited. First, remove the document from all document sets. Second, return to this page and edit the Dictionary. Last, add the document back to all document sets. The dictionary cannot be changed on this page. Refer to [Edit \(Documents\) \(Alternate Method\)](#) on page 74 for more information.
- 8 **Criteria:** Select any required criteria. Refer to [Criteria](#) on page 102 for more information. (Locked for Imported Documents)

- 9 **Recurring Type:** *None, Recurring or NonRecurring*. Refer to [Recurring Forms Guidelines](#) on page 76 for more information. (Locked for Attached Documents)



Documents that use app prefixes O1_, O2_, etc. set at the dictionary level must have **Recurring Type** set to None.

- 10 **Display Document While Processing:** When this is checked and documents are processed, they will display. Unchecking this checkbox only prevents the document from *displaying*; the document will still be processed. (Locked for Attached Documents)
- 11 **eVault Document:** Checked documents are sent to eVault for auditing and tracking of the original document. When eVault documents are included in a session, all documents in the session will be sent to eVault for auditing and tracking. (Not available for eAtlas installations)
- 12 **Show Other App in App Section:** This setting only affects documents when they are *Recurring Documents*. Other App is a *Co-Applicant* (not a Spouse). When this setting is checked, Other Applicant information (not the primary) is displayed in the Primary Applicant section. (Locked for Attached Documents)

Original Document	Show Other App in App Section Disabled	Show Other App in App Section Enabled						
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;"> Primary Applicant John Doe 123 Any Street Hometown, NJ </td> <td style="width: 50%; padding: 2px;"> Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ </td> </tr> </table>	Primary Applicant John Doe 123 Any Street Hometown, NJ	Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"></td> <td style="width: 50%; padding: 2px;"> Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ </td> </tr> </table>		Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;"> Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ </td> <td style="width: 50%;"></td> </tr> </table>	Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ	
Primary Applicant John Doe 123 Any Street Hometown, NJ	Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ							
	Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ							
Co-Applicant Joe Neighbor 456 Next Door Lane Nexttown, NJ								

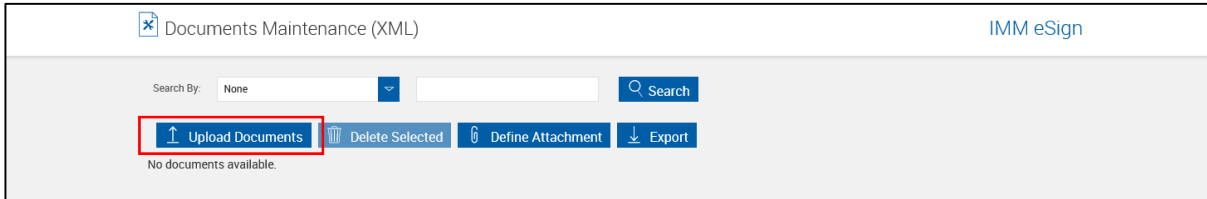
- 13 **Archive Document:** When checked, the document will automatically be archived when processed by itself or as part of a document session. When not checked, the document will not automatically be archived. This setting can be overridden during the document selection process only if the document is preselected to not be archived (only if this checkbox is cleared). Refer to the User Guide for more information. (Not available for eAtlas installations)
- 13 **Attachment:** Documents that have this box *checked* are additional documents that may be included with document sets. Refer to [Attach Documents](#) on page 70 for more information. (Not available for eAtlas installations)
- 15 **Vendor:** Select the supported third party from the dropdown so that the signature fields in third-party documents are automatically recognized.

Uploading XML Documents



Use only original PDF documents. Documents from the server's FI\SourcePDFs folder should not be re-uploaded.

From the Document Maintenance page,

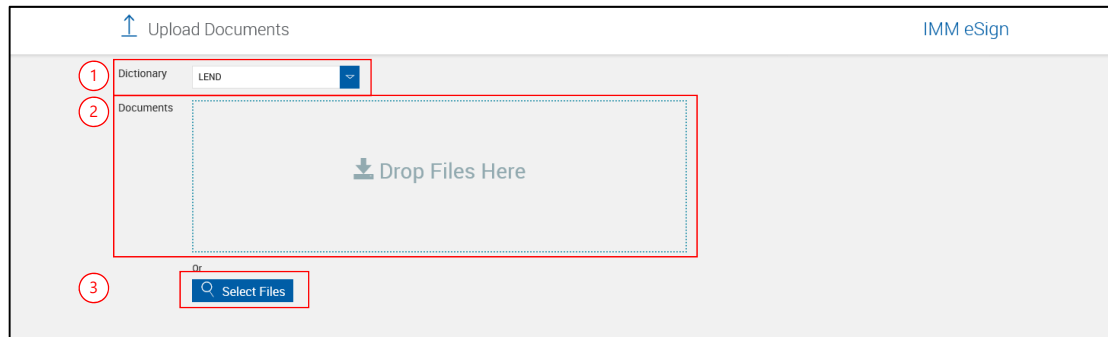


Click **Upload Documents**.

Continue with the [Upload Documents](#) on page 67.

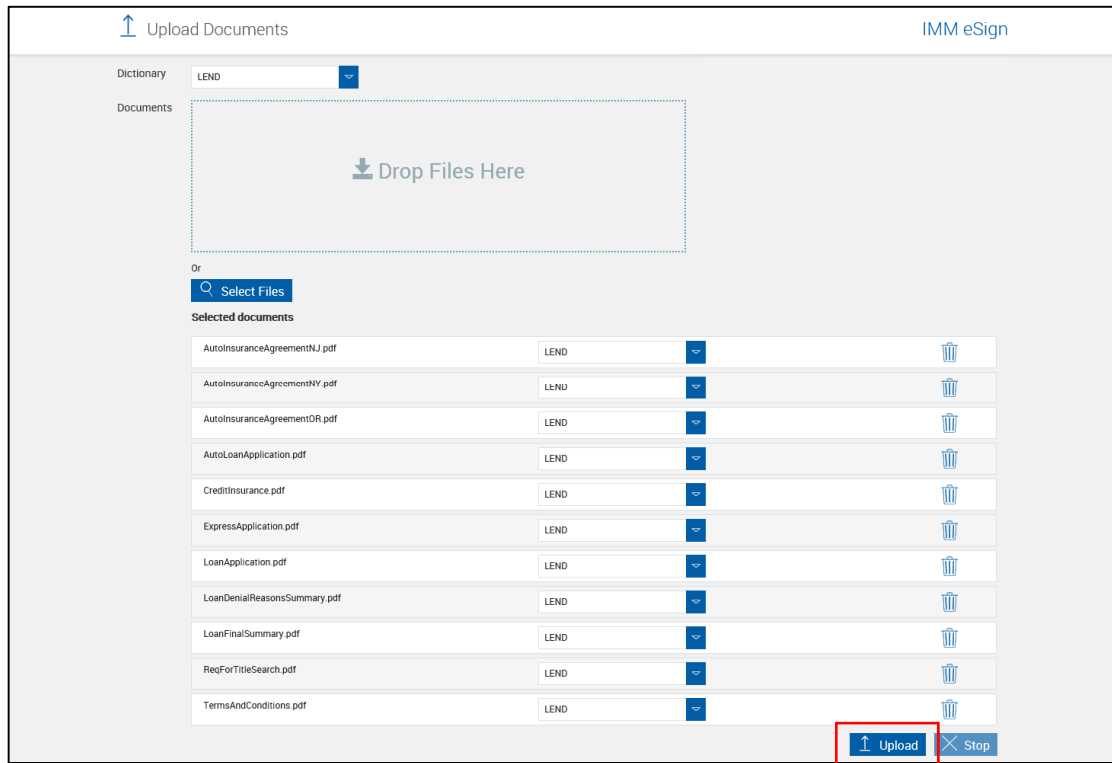
Upload Documents

- 1 The Upload Documents page is displayed.



- 1 **Dictionary:** Select a Dictionary from the drop-down.
- 2 **Drop Files Here:** Drag and drop existing PDF documents, or
- 3 **Select Files:** Navigate to and select the directory with your documents. Select one or more documents to upload. Click **Open**.

2 The Upload Documents page refreshes.




Click **Upload**.

3 The Open window is displayed.

Navigate to and select the directory with your documents.

Select one or more documents to upload.

 Press Ctrl-A to select all files.

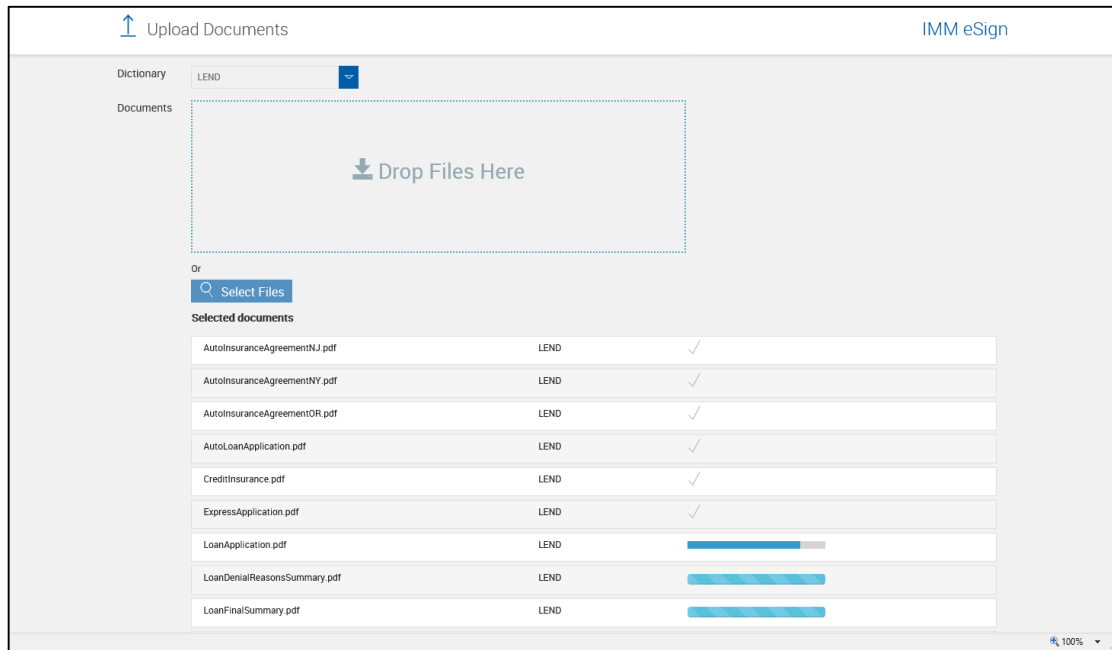
PDF Document Names

Depending on your document storage and indexing specifications, PDF document names may be used as part of a document name or document set name. For this reason, a document name cannot use the following characters: Space, Underscore (`_`) or Caret (`^`).

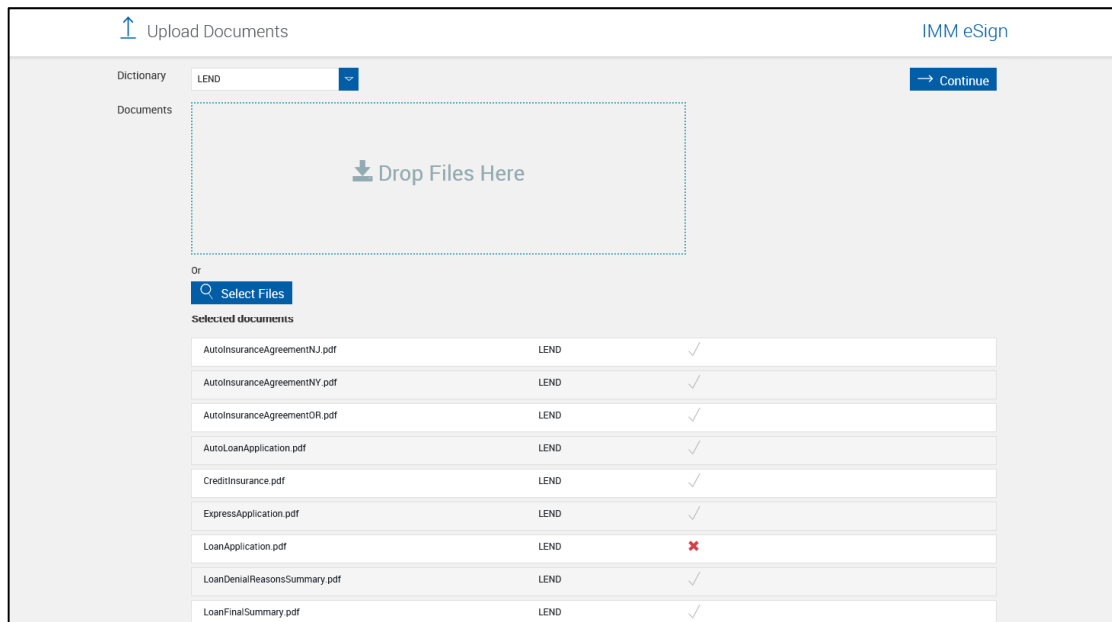
Examples:

"Your Document Name.pdf"	Invalid name	Uses spaces
"Your-Documant-Name.pdf"	Valid name	Dashes are allowed
"YourDocumentName.pdf"	Valid name	Uses no special characters

4 The Upload Documents window refreshes.

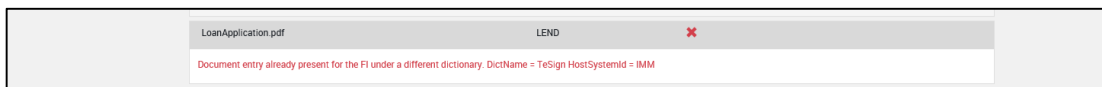


5 Successfully uploaded documents will display a checkmark.
Failed uploads will display a red X.



Click the document row for more information.

6 Failed upload explanation



7 Repeat steps 1-5 for any additional dictionaries.

8 The Document Upload process is complete.



When documents are successfully uploaded they will be moved to an Uploaded folder under the folder they were in.

9 After documents have been uploaded, edit document field information as necessary. As necessary, add documents to Document Sets ([Document Sets](#), page 85).

Attach Documents (Not available for eAtlas installations)

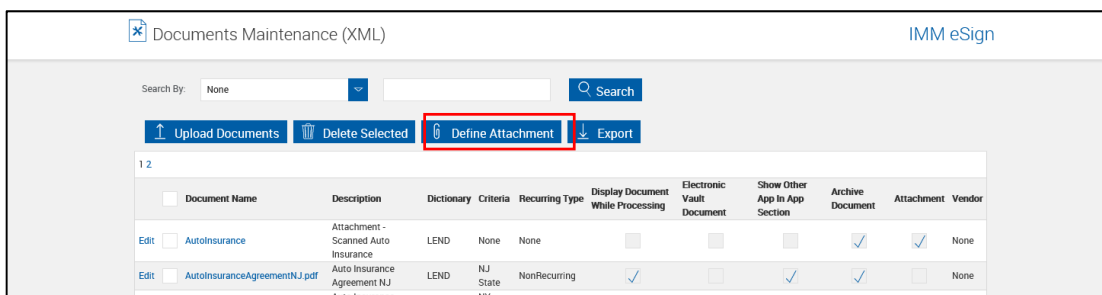
An Attached Document is a PDF document external from the normal IMM eSign document system. This could be a driver's license, passport, a written set of instructions, or any other document in PDF format.

Predefined PDF documents from selected vendors may also be added as attachments.

Refer to the User Guide for information on adding and using Attached Documents when processing document sets.

Before they can be used with document sets, attached document categories must be set up.

1 On the Document Maintenance page,
Click **Define Attachment**.




2 A new row is displayed.

	Document Name	Description	Dictionary	Criteria	Recurring Type	Display Document While Processing	Electronic Vault Document	Show Other App In Section	Archive Document	Attachment	Vendor
Update Cancel	DriversLicenseLending	Driver's License Lending	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None
Edit	AutoInsurance	Attachment - Scanned Auto Insurance	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None

The following information can be modified for an attached document:

- Document Name:** *For attached documents, the document name is more like a type or category than an actual name. You can scan a passport and save it as any name. When the document is added into the document set, the Document Name and the filename will be required information.*

 The Document Name field used for defining imported documents should not include a .PDF extension.

User's Attach Documents Popup

Add Documents

Library Attach Scan Photo

Attachment Type

AutoInsurance

DriversLicense

DriversLicenseLending

GAPInsuranceAgreement

GAPInsuranceG10240

- Description:** A description of the document. "Attachment" will automatically be prefixed to the description when **Update** is clicked.
- Dictionary:** Select a dictionary from the dropdown.
- Archive Document:** When checked, the document will automatically be archived when processed as part of a document set. When not checked, the document will not automatically be archived. This setting can be overridden when processing the document set. [Default: Checked]
- Attachment:** The Attachment checkbox is automatically checked.
- Vendor:** Where applicable, the name of the Vendor supplying this type of attachment. Current vendors are:
 - Allied IQQ
 - SWBC
 - CUNA

Click **Update** to save the information.

The Attach Document is added to the document list.

Deleting Documents



Deleting a document will remove that document from all document sets.
Do not delete a document during business hours.

From the Document Maintenance page,

Documents Maintenance (XML) IMM eSign

Search By: None Search

Up Documents Delete Selected Define Attachment Export

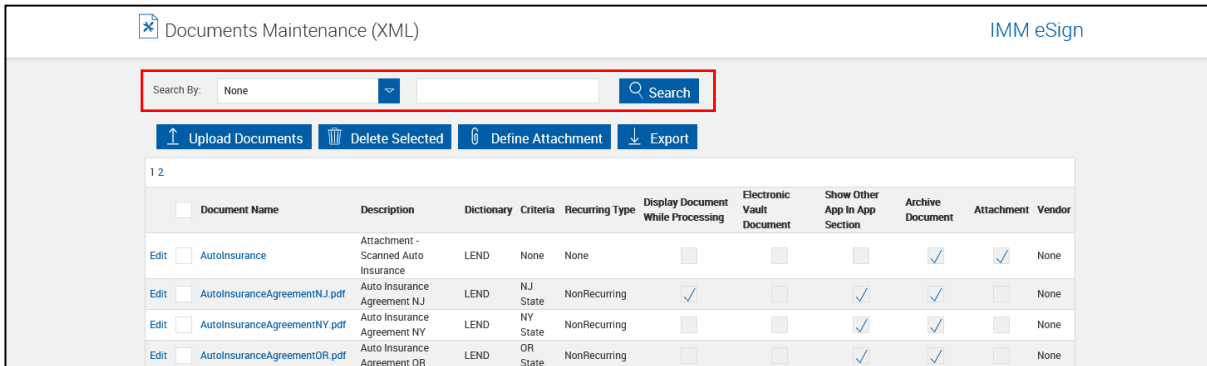
	Document Name	Description	Dictionary	Criteria	Recurring Type	Display Document While Processing	Electronic Vault Document	Show Other App In App Section	Archive Document	Attachment	Vendor
Edit	<input type="checkbox"/> AutoInsurance	Attachment - Scanned Auto Insurance	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None
Edit	<input type="checkbox"/> AutoInsuranceAgreementNJ.pdf	Auto Insurance Agreement NJ	LEND	NJ State	NonRecurring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None
Edit	<input type="checkbox"/> AutoInsuranceAgreementNY.pdf	Auto Insurance Agreement NY	LEND	NY State	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None
Edit	<input type="checkbox"/> AutoInsuranceAgreementOR.pdf	Auto Insurance Agreement OR	LEND	OR State	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None

- 1 Check the box to the left of the document to be deleted.
- 2 Check the box at the top of the column to select all documents.
- 3 Click **Delete Selected**.

Click **OK** to the message popup.

Search (for Documents)

A search filter is available to assist in locating your documents.



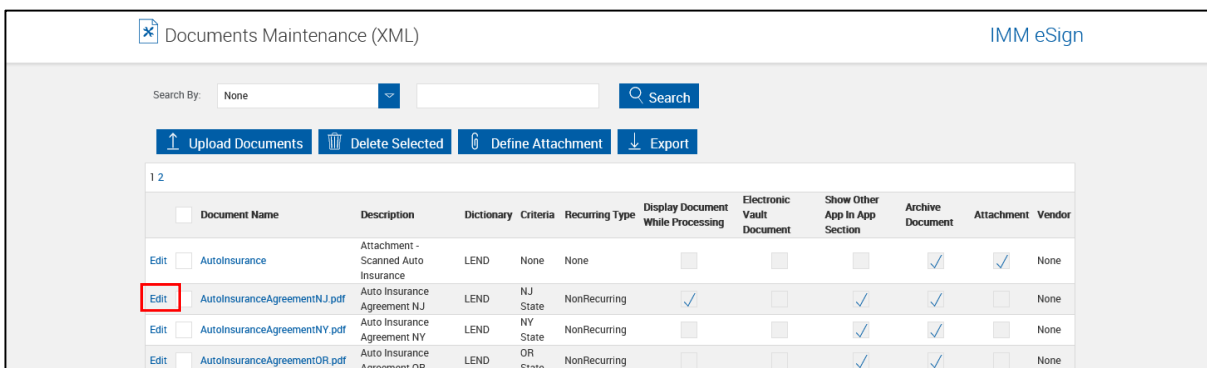
- Select the **Search By** drop-down field.
 - **None**: After completing a search, select **None** and click **Search** to view all documents.
 - **Document Name**: This will search for all documents matching the search parameter.
 - **Dictionary**: This will search for all documents in the selected dictionary.
- Enter the document or dictionary name. (When searching for a document, the asterisk “*” can be used as a wild card character.)
- Enter the search parameter (document or dictionary name).

Click **Search**.

The Document Maintenance page refreshes listing the results of the search.

Edit (Documents)

From the Document Maintenance page,



Click **Edit** to the left of the document name.

The Document Maintenance page refreshes with the document fields unlocked.

Edit the document field information as necessary.

Click **Update**.

Edit (Documents) (Alternate Method)

- 1 Another method of editing document field information is to click on the document name.

The screenshot shows the 'Documents Maintenance (XML)' interface. At the top, there is a search bar with 'None' selected and a 'Search' button. Below the search bar are four action buttons: 'Upload Documents', 'Delete Selected', 'Define Attachment', and 'Export'. The main content is a table with the following columns: Document Name, Description, Dictionary, Criteria, Recurring Type, Display Document While Processing, Electronic Vault Document, Show Other App In App Section, Archive Document, Attachment, and Vendor. The table contains four rows of data, with the second row, 'AutolInsuranceAgreementNJ.pdf', highlighted by a red box. The 'Edit' link for this row is also highlighted.

	Document Name	Description	Dictionary	Criteria	Recurring Type	Display Document While Processing	Electronic Vault Document	Show Other App In App Section	Archive Document	Attachment	Vendor
Edit	AutolInsurance	Attachment - Scanned Auto Insurance	LEND	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None
Edit	AutolInsuranceAgreementNJ.pdf	Auto Insurance Agreement NJ	LEND	NJ State	NonRecurring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None
Edit	AutolInsuranceAgreementNY.pdf	Auto Insurance Agreement NY	LEND	NY State	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None
Edit	AutolInsuranceAgreementOR.pdf	Auto Insurance Agreement OR	LEND	OR State	NonRecurring	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None

2 The Edit Document page is displayed.

Click **Edit**.

The Edit Document page refreshes with the document fields unlocked.

Edit the document field information, as necessary.

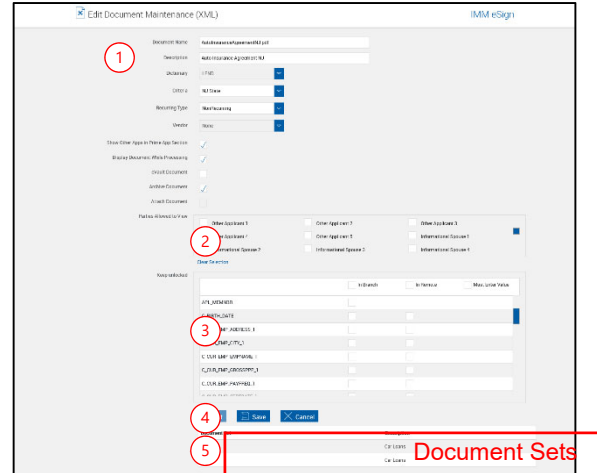
All field definitions from page 65 are the same.

Additionally:

- 1 **Document Name:** The name *can* be changed on this page. *Note: When you change the name a document, the associated document sets and the criteria are automatically updated. These changes must be made on your imaging system for successful document import.*
- 2 **Parties Allowed to View:** Select any party that will be allowed to view the document during processing. Multiple parties may be allowed and will be controlled by the user during the processing and signing processes.
- 3 **Unlock Selected Fields:** (For Data Locking) When documents are processed by the Process button, fields are locked (no changes can be made to the field information). You may need to modify information as the document is processed. For example, a phone number change or a driver's license number may need to be changed. These fields must be unlocked on this page to give your users the ability to modify the contents of the field.

Notes:

 - All HOST (XML populated) fields will be locked by default. Use this settings to unlock those fields.
 - All HOST fields which are blank (have no value) in the XML source will remain open prior to signing.
 - All GENERIC (non-XML) fields will remain open prior to signing.
 - If all signers sign the session successfully, all fields will be locked EXCEPT fields prefixed with "IMM_UNL_". These fields will not be listed in the above screen as it will always remain unlocked.
- 4 **Action Buttons:**
 - **Edit:** Unlocks all editable fields for making changes.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click if you do not want to save any changes.
- 5 **Document Sets:** The lower part of this page lists the Document Sets that use this document.



After completing changes,

Click **Save**.

Recurring Forms Guidelines

There are three possible recurring behaviors for lending documents: Recurring, Non-recurring, and None.

- **Recurring:** This option takes relationships into account to ensure personal information is not distributed to other applicants. For example, the Primary Applicant and Spouse are on one document because personal information can be shared between spouses, and then a separate document is generated for each Co-applicant/Other applicant.
- **Non-recurring:** The non-recurring behavior ignores relationships between applicants. When this option is selected, Spouses and Co-applicants/Other applicants are treated the same.
- **None:** “None” is ideal for applicant-specific documents, such as an adverse action document. For example, a loan guarantee is for a Guarantor applicant only.

There are two components involved in determining the behavior of documents:


- **Document Mapping:** The fields used in a PDF template.
- **Data Source:** An XML file that is passed from the Host System to IMM eSign. For example, the Data Source can have data for the following applicants:
 - **Primary Applicant:** The field label for this group is A_ or P_.
 - **Spouse:** The field label for this group is C_.
 - **Co-applicant/Other Applicant:** The field label for this group is O_ (O1, O2, etc.)
 - **Guarantor:** The field label for this group is G_ (G1_, G2_, etc.)

The recurring behavior allows the applicant information to display automatically for each applicant if the following elements are correct:

- The applicant’s role or association with the loan/account (Refer to the “Required Fields’ Prefix with Data Source” column in the following table.)
- The required fields’ prefixes (Refer to the “Required Fields’ Prefix with Data Source” column in the following table.)
- The field mapping of the document (Refer to the “Document Mapping” column in the following table.)

Refer to the following table for details.

Behavior	Document Mapping	Required Fields' Prefix with Data Source	Result
Recurring <i>(Lending Dictionary - Optional)</i>	1st applicant: A_ or P_ 2nd applicant: C_	Primary Applicant: A_ or P_ Spouse: C_ Co-applicant/ Other Applicant: O1_, O2_, etc.	Generates one document copy for Primary AND Spouse AND Generates a separate document for each Co-applicant/Other
Non-recurring <i>(Lending Dictionary - Optional)</i>	1st applicant: A_ or P_ 2nd applicant: C_	Primary Applicant: A_ or P_ Spouse: C_ Co-applicant/ Other Applicant: O1_, O2_, etc.	Generates one document copy for Primary AND Spouse OR Co-applicant/Other AND Generates a separate document for each additional Co-applicant/Other
None <i>(Lending and Membership Dictionaries - Mandatory)</i>	1st applicant: A_ or P_ 2nd applicant: O1_	Primary Applicant: A_ or P_ Co-applicant/ Other Applicant: O1_, O2_, etc.	Generates a document for Primary AND/OR Co-applicant/Other

- 
 - If documents are mapped incorrectly for the second applicant, then “recurring” or “non-recurring” options will not work as described in the previous table.
 - If documents are mapped for the second applicant with prefix O1_, the recurring option **MUST** be set to “None.” The option of automatically generating a separate document for each non-spouse **WILL NOT** be available for those documents.
 - If your document should be mapped for two borrowers, the correct prefix for the second applicant is always C_. IMM eSign automatically populates the C_ fields in case the XML data has O1_ as the field’s prefix for the second applicant.
 - Creation of a separate document for each Co-applicant/Other Applicant is supported only for the applicant with prefix O1_, O2_, O3_, etc. The document that contains other field prefixes, such as GA1_ for guarantor, should be explicitly mapped for each guarantor (GA1_, GA2_, etc.).
 - If the document should be generated for other applicant prefixes besides C_ and O1_ (O2_, O3_, etc.), then IMM eSign document **MUST** be mapped accordingly. For example, if an IMM eSign document needs to display two guarantors, then the prefix for the first guarantor should be GA1_ and the second guarantor should be GA2_.

Refer to the following tables of examples where the Data Source for Primary Applicant is A_, Spouse is C_, First Co-applicant/Other Applicant is O1_, Second Co-applicant/Other Applicant is O2_, and Guarantor is G1_. The guidelines provided below apply to lending application forms only.

Document Mapping	Behavior	Result
Primary (A_) Spouse (C_)	Recurring and Non-recurring	Document 1 – Primary and Spouse (A_ and C_)
Primary (A_) Co-applicant/ Other Applicant (O1_)	Recurring	Document 1 – Primary Applicant (A_) Document 2 – Co-applicant/Other Applicant (O1_)
	Non-recurring	Document 1 – Primary and Co-applicant/Other Applicant (A_ and O1_)
Primary (A_) Two Co-applicant/ Other Applicants (O1_ and O2_)	Recurring	Document 1 – Primary Applicant (A_) Document 2 – First Co-applicant/Other Applicant (O1_) Document 3 – Second Co-applicant/Other Applicant (O2_)
	Non-recurring	Document 1 – Primary and Co-applicant/Other Applicant (A_ and O1_) Document 2 – Second Co-applicant/Other Applicant (O2_)
Primary (A_) Spouse (C) Co-applicant/ Other Applicant (O1_)	Recurring and Non-recurring	Document 1 – Primary and Spouse (A_ and C_) Document 2 – Co-applicant/Other Applicant (O1_)
Primary (A_) Spouse (C_) Two Co-applicant/ Other Applicants (O1_ and O2_)	Recurring and Non-recurring	Document 1 – Primary and Spouse (A_ and C_) Document 2 – First Co-applicant/Other Applicant (O1_) Document 3 – Second Co-applicant/Other Applicant (O2_)
Primary (A_) Spouse (C) Co-applicant/ Other Applicant (O1_) Guarantor (G1_)	Recurring and Non-recurring	Document 1 – Primary and Spouse (A_ and C_) Document 2 – First Co-applicant/Other Applicant (O1_) Document 3 – Guarantor (G1_)

When “None” is selected, all of the applicants are grouped together except the applicant that is particular to the “applicant-specific” document.

Document Mapping	Behavior	Result
Primary (A_) Spouse (C_)	None	Document 1 – Primary and Spouse (A_ and C_)
Primary (A_) Spouse (C) Co-applicant/ Other Applicant (O1_)	None	Document 1 – Primary, Spouse (A_ and C_), and Co-applicant/Other Applicant (O1_)
Primary (A_) Spouse (C) Co-applicant/ Other Applicant (O1_) Guarantor (G1_)	None	Document 1 – Primary, Spouse, and Co-applicant/Other Applicant (A_, C_, and O1_) Document 2 – Guarantor (G1_) <i>In this case, the Guarantor (G1_) is the applicant that is particular to the “applicant-specific” document.</i>

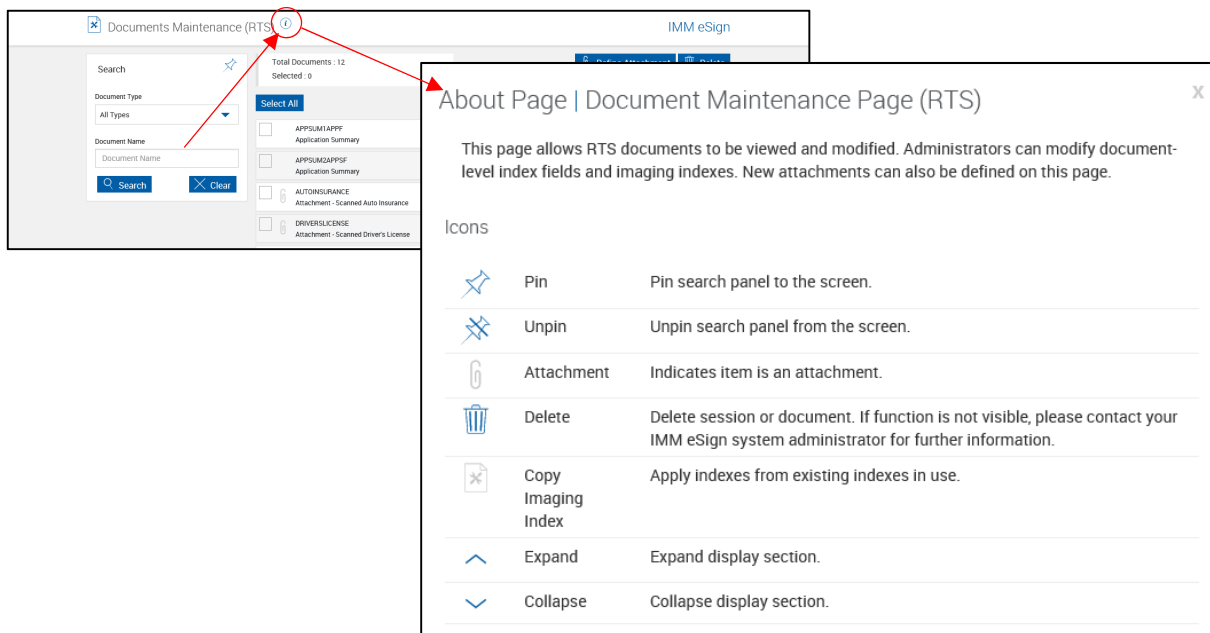
Documents – (RTS) – Documents Maintenance

Click **Administration > Documents (RTS)**.








About Page – Documents Maintenance (RTS)

The Help button provides a quick listing of icons and functions available and related to the Documents Maintenance Page (RTS).


Click the Page Help button.



The screenshot shows the 'Documents Maintenance (RTS)' page in the IMM eSign application. A red circle highlights the help icon (an 'i' in a circle) in the top right corner of the page header. A red arrow points from this icon to a help popup window titled 'About Page | Document Maintenance Page (RTS)'. The popup contains the following text: 'This page allows RTS documents to be viewed and modified. Administrators can modify document-level index fields and imaging indexes. New attachments can also be defined on this page.' Below this text is a section titled 'Icons' with a list of icons and their descriptions:

Icon	Function	Description
	Pin	Pin search panel to the screen.
	Unpin	Unpin search panel from the screen.
	Attachment	Indicates item is an attachment.
	Delete	Delete session or document. If function is not visible, please contact your IMM eSign system administrator for further information.
	Copy Imaging Index	Apply indexes from existing indexes in use.
	Expand	Expand display section.
	Collapse	Collapse display section.

Documents Maintenance (RTS)

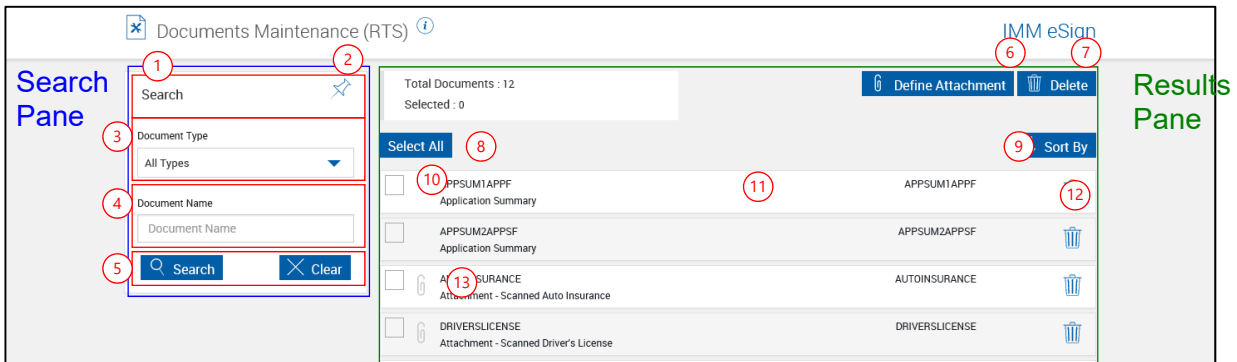
 This page may not display for your installation.



This page is used to add attachments and delete documents in conjunction with Admin Manager.

The administrator can rename parameters, delete sessions and add/define attachments.

Click **Administration > Documents**.

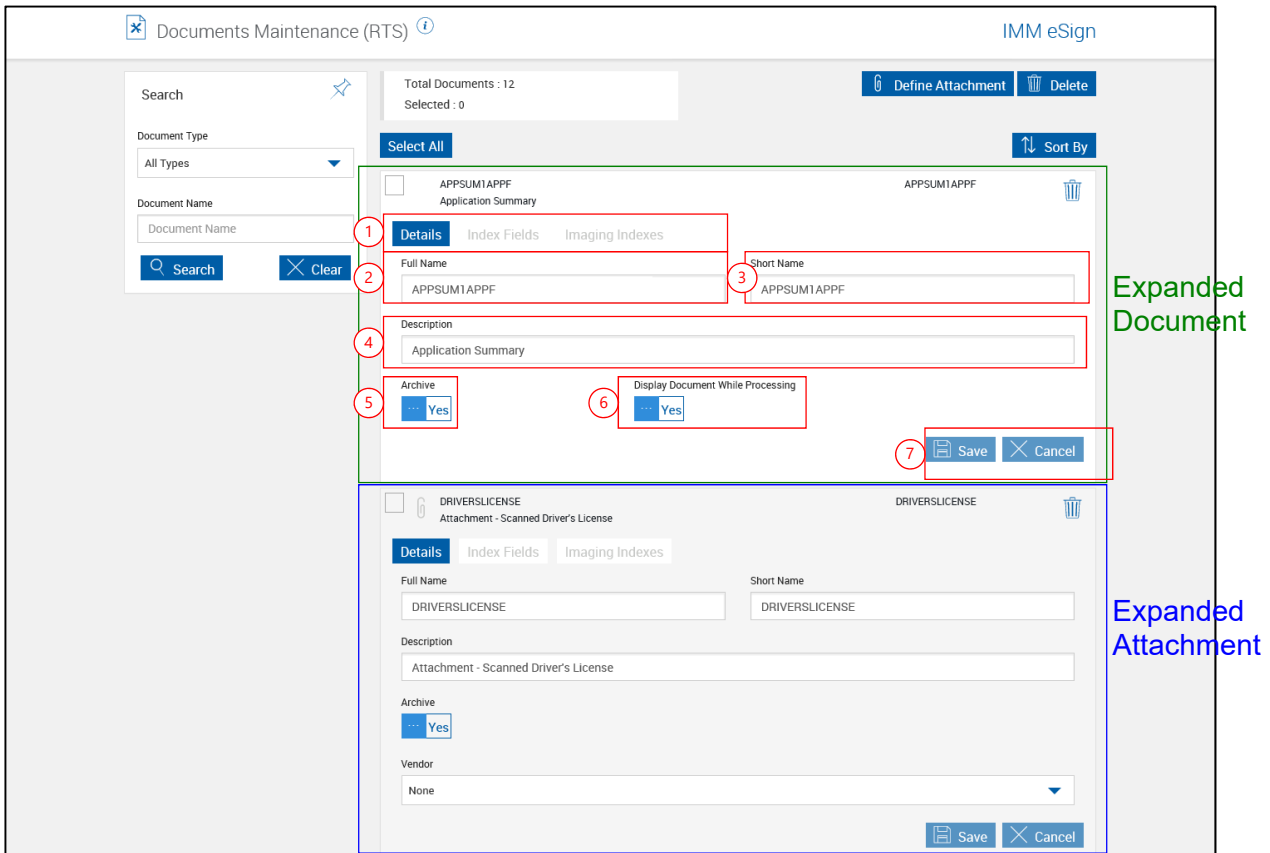
Default View



- 1 **Title Bar:** Click the title bar area to expand/minimize the search pane.
- 2 **Pin/Unpin:** Click the pin to display  or collapse  the search parameters section of the page when the results are displayed.
- 3 **Document Type:** Search for *All Types, Document or Attachment*.
-Or-
- 4 **Document Name:** Search by document name. Refer to [Search Hints](#) (page 172).
- 5 **Search Pane Action Buttons:**
 - **Search:** Search documents based on the selected parameters.
 - **Clear:** Close existing results and clear search parameters.
- 6 **Define Attachment:** Click this button to define a document attachment. Refer to [Define Attachment](#) on page 83 for more information.
- 7 **Delete (Selected Documents):** Use **Select All** (8) or **Select Individual** (9) to select documents. Click **Delete** (7) to delete the selected documents. Click OK to the Delete Document confirmation popup to complete deleting.
- 8 **Select All:** Click to select all documents and attachments. Click again to unselect all.
- 9 **Sort By:** Click to select sort method.
- 10 **Select (Individual Documents):** Click to select one or more documents and attachments.
- 11 **Document Information:** Click to expand the document information.
- 12 **Delete (Current Session):** Displays for attachment definitions.
- 13 **Attachment Icon:** Displays for attachment definitions.

Expanded Documents – Details Tab

Each document or attachment has 3 sub-tabs.



- 1 **Sub-Tabs:** Details, Index Fields, Imaging Indexes. Examples following.
- 2 **Full Name:** The *Full Name* is used in indexing and defaults to the current filename but can be modified at this point. (100 characters maximum).
- 3 **Short Name:** Used in creating the filename for archive documents. (20 characters maximum]
- 4 **Description:** Used for the *Document Description* column. An easy to recognize description of the document. (150 characters maximum)
- 5 **Archive:** Click to toggle between Yes and No. When Yes, the document can be archived. When No, the document will not be archived.
- 6 **Display Document While Processing:** When checked and documents are processed, the documents will display during processing by *default*. When not checked the document may still be *optionally* displayed while processing. (*This setting does not display for attachments.*)
- 7 **Results Pane Action Buttons:**
 - **Save:** Click this button to save changes to a document.
 - **Cancel:** Click to cancel changes to a document.

Expanded Documents – Index Fields Tab

Field Name	Default Value	Action
IMM_STDIND_DATE	Imaging Index	Trash
IMM_STDIND_TIME	Imaging Index	Trash
IMM_STDIND_TRANSID	Imaging Index	Trash
CSTM_CUSTOMERNUMBER	Imaging Index	Trash
CSTM_TID	Imaging Index	Trash

[+ Add](#)

Expanded Documents – Imaging Indexes Tab

Available Indexes	File Room	Cabinet	Type	Institution	Authority	Vocabulary	Document Name
(X) (Document_Path) Document Path	X	X	X				
(X) (Document_Name) Document Name		X	X				
(X) (Document_Set_N) Document Set Name			X				
(X) (Archive_Docume... Archive Document...							
(X) (IMM_STDIND_DA... IMM Date							
(X) (IMM_STDIND_TI... IMM Time							
(X) (IMM_STDIND_TR... IMM Transaction ID							
(X) (Full_Name) Full Name							
(X) (CSTM_CUSTOME... Customer Number							
(X) (CSTM_TID) Tax Identification...							

[Preview](#) [Save](#) [Clear](#)

Define Attachment

After clicking **Define Attachment** on the Document Maintenance page,
The Define Attachment Popup Appears.

Define Attachment

1 Full Name

2 Short Name

3 Description

4 Archive

5 Vendor

6 Save Cancel Close

Complete all information.

- 1 **Full Name:** The *Full Name* is used in indexing and defaults to the current filename but can be modified at this point. (100 characters maximum).
- 2 **Short Name:** Used in creating the filename for archive documents. (20 characters maximum]
- 3 **Description:** Used for the *Document Description* column. An easy to recognize description of the document. (150 characters maximum)
- 4 **Archive:** Click to toggle between Yes and No. When Yes, the document can be archived. When No, the document will not be archived.

5 Vendor: Where applicable, the name of the Vendor supplying this type of attachment.
Current vendors are:

- Allied IQQ
- SWBC
- CUNA

6 Action Buttons:

- **Save:** Click this button to save changes to an attachment.
- **Cancel:** Click to cancel changes to the current attachment.
- **Close:** Close the popup without saving any changes.

Document Sets Maintenance (XML)

Click **Administration > Document Sets**.

The screenshot shows the 'Document Sets Maintenance' page in the IMM eSign interface. At the top, there are three buttons: 'Delete Selected', '+ Add Document Set', and 'Export'. Below these is a table with the following data:

Document Set	Description	Dictionary
<input type="checkbox"/> CarLoan	Car Loans	LEND
<input type="checkbox"/> CL1	Car Loans	LEND
<input type="checkbox"/> Mort1	Mortgages	LEND
<input type="checkbox"/> NM1	New Members	MBR

At the bottom of the page, it says 'Displaying Document Sets: 1 through 4. Total Document Sets available: 4'.

The Document Sets Maintenance feature allows the Administrator to group related XML documents in a logical set.

With this option, you can add and remove documents that are required for a given set, such as a checking account, an IRA, etc. You may also modify the behavior of the documents in the set – whether they will display, how many copies need to be printed, whether the document is required and the recurrence type.

Add Document Sets

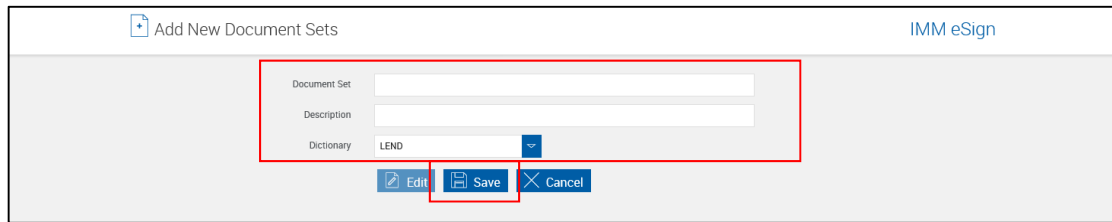
- 1 From the Documents Sets Maintenance page,
Click **Add Document Set**.

This screenshot is identical to the previous one, but the '+ Add Document Set' button is highlighted with a red rectangular box to draw attention to it.



This button may be disabled and require extra settings to enable.

2 The Add New Document Sets page is displayed.



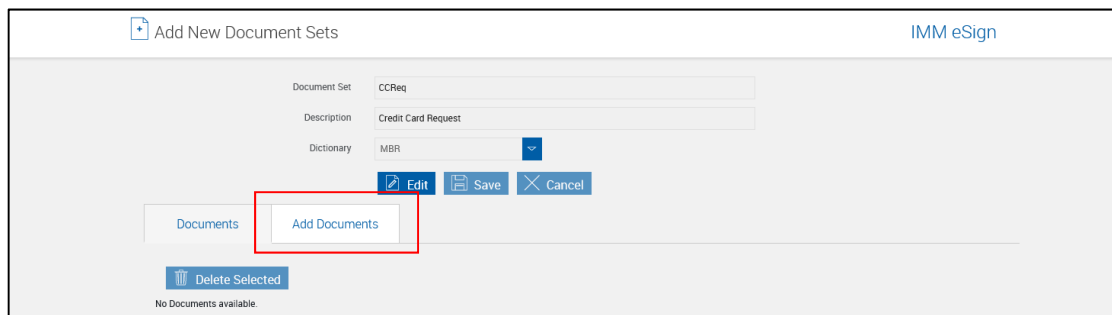
The following information is necessary to create a new Document Set.

- **Document Set:** The reference title may contain letters, numbers and the underscore (_) character but may not contain a space in the title.
- **Description:** Enter a description for the document set.
- **Dictionary:** Choose a dictionary as a source for the documents.

Click **Save**.

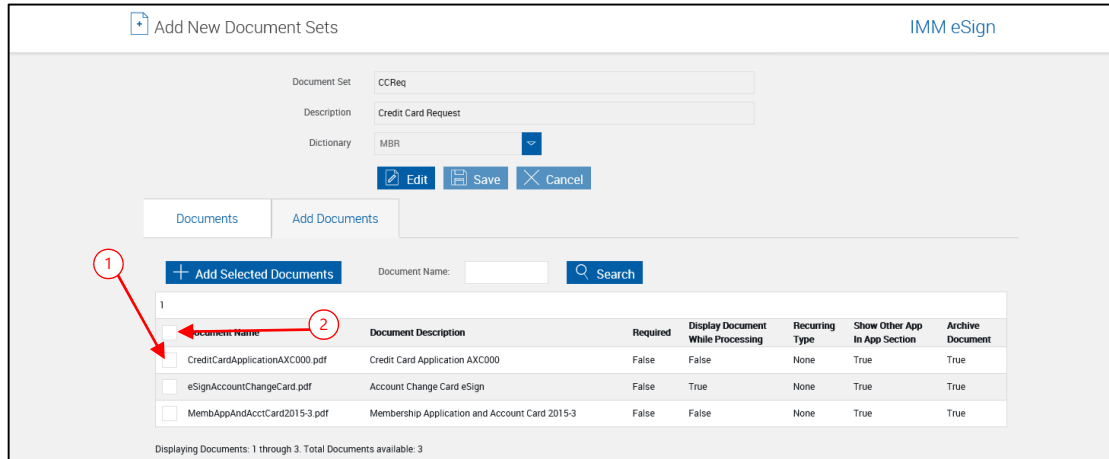
3 The new document set information is saved.

The Add New Document Sets page refreshes with additional information.



Click **Add Documents**.

4 The Edit Document Sets page refreshes showing available documents from the selected dictionary.

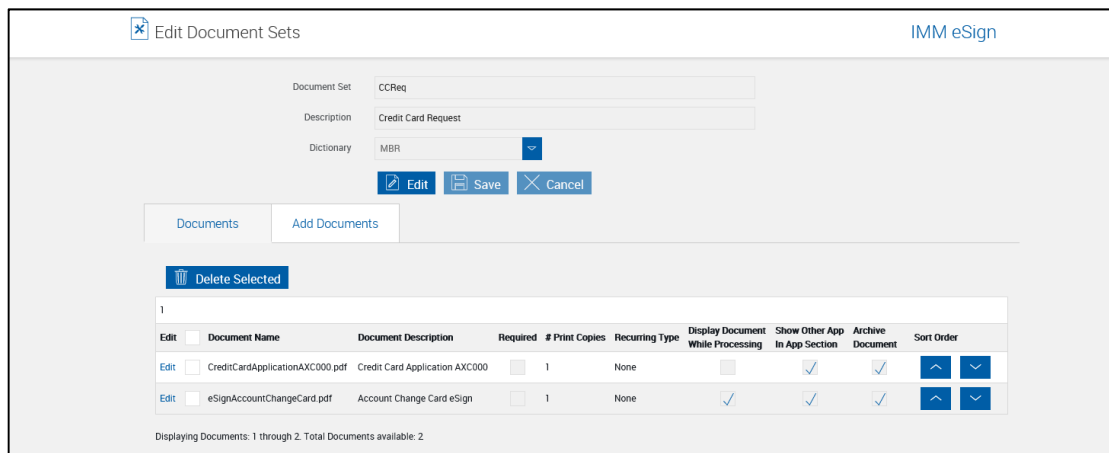


A basic search tool is available to assist the Administrator to locate documents. Enter the document name (only the asterisk “*” may be used as a wild card character). Click Search.

- 1 Check the checkbox next to the documents to be included in the document set.
- 2 Check the checkbox next to the Document Name column head to select all documents.

Click **Add Selected Documents**.

5 The documents are added to the set.

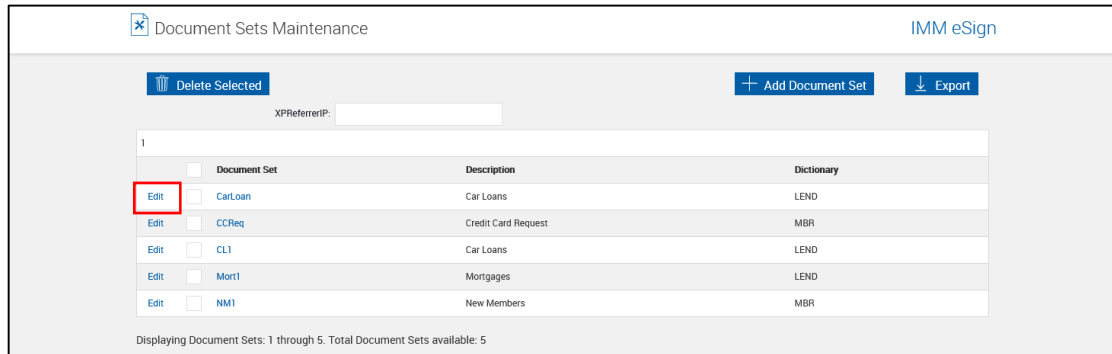


Use  and  to move the documents up or down in the display order.

At this point, document settings within the document set can be edited. Refer to [Modify Document Sets](#) on page 89 for more information.

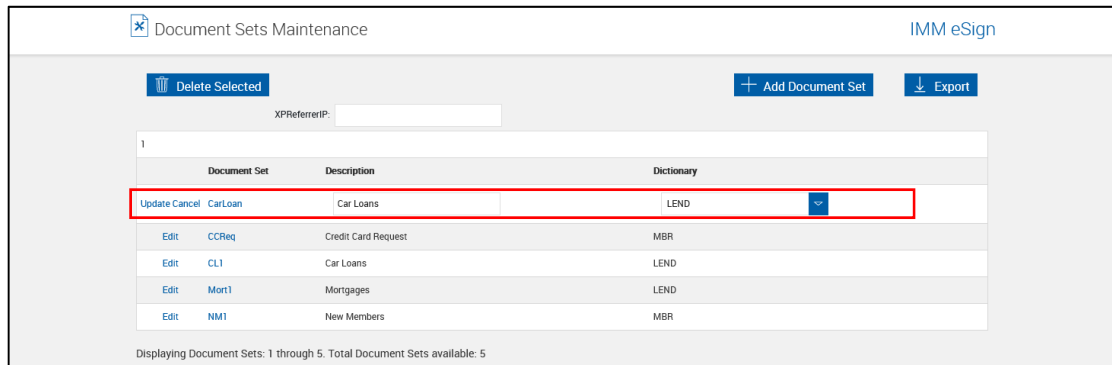
Edit Document Sets

- 1 From the Document Sets Maintenance page,



Click **Edit** to the left of the document set name.

- 2 The Document Sets Maintenance page refreshes with the document set fields unlocked.



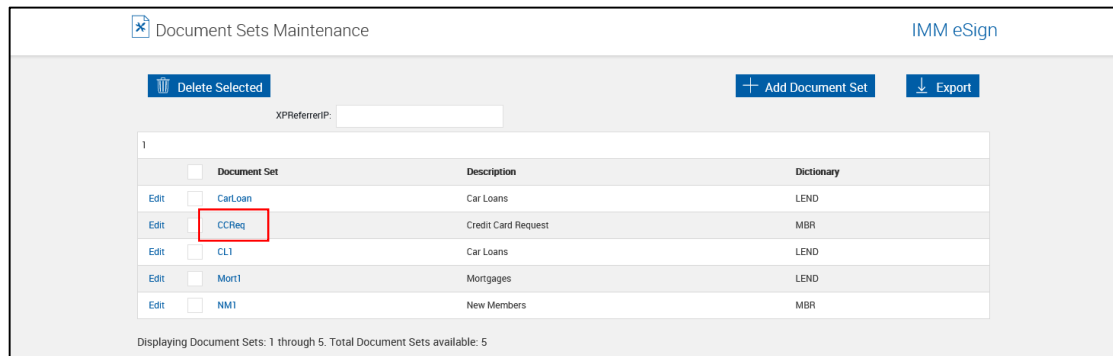
Edit the document set field information, as necessary.

- **Description:** Modify the description for the document set.
- **Dictionary:** Change the dictionary as a source for the documents.

Click **Update**.

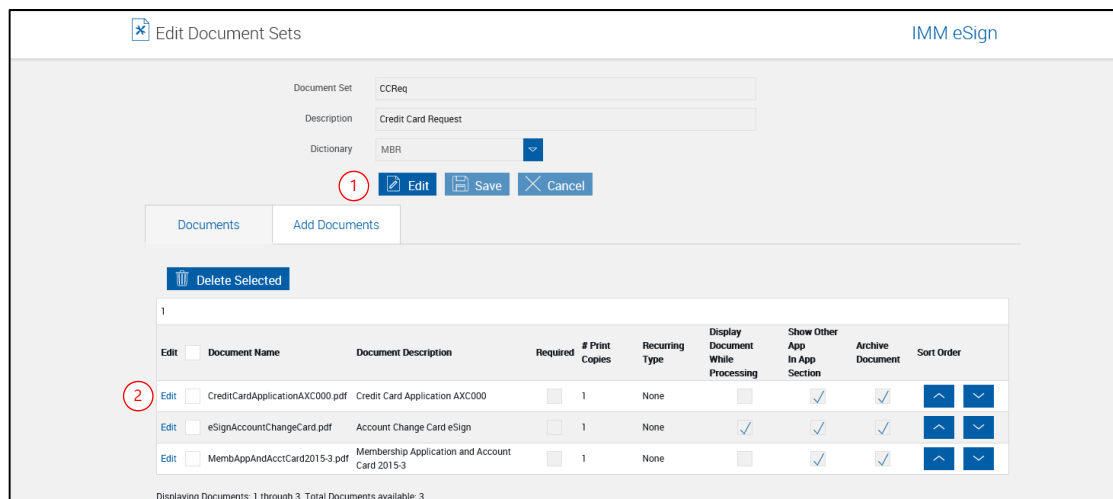
Modify Document Sets

- 1 From the Document Sets Maintenance page,



Click the **Document Set name**.

- 2 The Edit Document Sets page is displayed.



The upper portion of this page can be used to edit the Document Set Description and Name.

- 1 Click the **Edit button** to unlock the Document Set Information Fields and make changes.

The lower portion of this page is used to add, delete and edit document information for the selected document set only.

- 2 Click the **Edit link** to the left of the document name to unlock individual documents within the set.

3 The Edit Document Sets page refreshes with the document information unlocked.

Edit	Document Name	Document Description	Required	# Print Copies	Recurring Type	Display Document While Processing	Show Other App In App Section	Archive Document	Sort Order
Update Cancel	CreditCardApplicationAXC000.pdf	Credit Card Application AXC000	<input checked="" type="checkbox"/>	1	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit	eSignAccountChangeCard.pdf	Account Change Card eSign	<input type="checkbox"/>	1	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	^ v
Edit	MembAppAndAcctCard2015-3.pdf	Membership Application and Account Card 2015-3	<input type="checkbox"/>	1	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	^ v

The following document information can be edited.

- **Required:** Select if the document is required for this set.
- **# Print Copies:** Number of copies to print.

Use [^](#) and [v](#) to move the documents up or down in the display order.

Click **Update** to exit the edit mode and save changes.

Click **Cancel** to exit the edit mode without saving changes.



Display Document While Processing cannot be edited on this page. This is a document-only setting. Refer to [Display Document While Processing](#) on page 66 for more information.

Delete Document Sets

From the Document Sets Maintenance page,

The screenshot shows the 'Document Sets Maintenance' page in the IMM eSign system. At the top, there is a search bar with 'XRF' and 'srIP:' next to it. To the right of the search bar are two buttons: '+ Add Document Set' and '↓ Export'. Below the search bar is a table with the following columns: 'Document Set', 'Description', and 'Dictionary'. The table contains five rows of data:

Document Set	Description	Dictionary
<input type="checkbox"/> CarLoan	Car Loans	LEND
<input type="checkbox"/> CCReq	Credit Card Request	MBR
<input type="checkbox"/> CL1	Car Loans	LEND
<input type="checkbox"/> Mort1	Mortgages	LEND
<input type="checkbox"/> NM1	New Members	MBR

At the bottom of the page, it says 'Displaying Document Sets: 1 through 5. Total Document Sets available: 5'. Three red circles and arrows indicate the steps: 1. Check the box to the left of the document set to be deleted (CarLoan). 2. Check the box at the top of the column to select all. 3. Click **Delete Selected**.

- 1 Check the box to the left of the document set to be deleted.
- 2 Check the box at the top of the column to select all.
- 3 Click **Delete Selected**.

Click **OK** to the message popup.

Workflow Builder

Workflow Builder is used to create, modify and publish workflows. A workflow is a process, or a programmed set of instructions, used to guide documents and document sets through various approval, review and completion steps at your Financial Institution.

Click **Administration > Workflow Builder**.

The Workflow Builder page is displayed and the In Development radio button is selected.



All current workflows in development are listed.

Select the radio button for a workflow and choose an action from the dropdown menu.

- **Actions:** The following actions are available.
 - **Create Workflow:** Used to design a new workflow.
 - **Edit Workflow:** Allows editing existing workflows. Double-clicking on a workflow row will open the workflow in edit mode. Editing a published workflow will create a copy of the workflow, increment the version number and open the workflow in development.
 - **Publish Workflow:** Moves the workflow into the Published Version screen. The published version will be incremented.
 - **Copy Workflow:** Creates a copy of an existing workflow.
 - **Delete Workflow:** Removes a workflow.



In Development workflows can be deleted.

Published workflows cannot be deleted if there are in-work tasks associated with the workflow.

- **Import Workflow:** Imports a workflow from a different Financial Institution from an XML file.
- **Export Workflow:** Exports a workflow to an XML file.
- **Version Management:** Allows a workflow to be republished or replaced with a previous version.
- **Published Version:** Displays a list of published workflows.
- **In Development:** Displays a list of In-Development workflows.

Workflow Permissions

Each user may have specific permissions allowed for workflow.

Click **Administration > Workflow Permissions**.

The Workflow Permissions page is displayed.

Workflow Permissions Page

There are several configurations available on this page, based on the tabs selected.

Groups – Workflows

Groups – Workflows Listing

The following settings are available:

- 1 **Groups tab:** Select the group permissions area.
- 2 **Users tab:** Select a user permission area.
- 3 **Inbox Management tab:** Add, edit and disable shared inboxes. Refer to [Inbox Management](#) on page 100.
- 4 **Select:** Depending on the tab selected above, select a group from the drop-down menu.
- 5 **Workflow-Level Permissions:** The group may have permissions in more than one area.
 - **Builder:** Check this box to give the group access to the Workflow Builder page.
 - **Security:** Check this box to give the group access to the Workflow Permissions and Workflow License Usage pages.
 - **Admin:** Check this box to give the group access to all workflows, inboxes and workflow pages.
- 6 **Group ID:** This is the group as set in your network active directory.
- 7 **Group Name:** This is the group name as set in your network active directory.
- 8 **Workflow Tab:** This area is used to set access for individual workflows.
- 9 **Inboxes Tab:** This area is used to set access to shared and personal inboxes.
- 10 **Workflow Permissions:** This area lists all available workflows. Check these boxes to allow groups the right to create and route cases using the selected workflow. Checking All will allow the group to create and route cases using any existing and future workflow. If this box is not checked the group will not have items related to that workflow in the Cases window.

Groups – Inboxes

The screenshot shows the 'Workflow Permissions' interface. At the top, there are three tabs: 'Groups' (highlighted with a red box and circle 1), 'Users' (circle 2), and 'Inbox Management' (circle 3). Below the tabs is a 'Select' dropdown menu (circle 4) with 'New' selected. To the right of the dropdown are three checkboxes: 'Builder' (circle 5), 'Security', and 'Admin', each with a corresponding 'Save' or 'Delete' button. Below these are input fields for 'Group ID' (circle 6) and 'Group Name' (circle 7). At the bottom, there are two sections: 'Shared Inboxes' (circle 8) and 'Personal Inboxes' (circle 9). The 'Shared Inboxes' section is expanded and contains a list of checkboxes for roles like 'BranchManagers', 'LendingDocs', 'Remote Inbox', 'Card Services', 'Operations', and 'Sample Shared Inbox'. The 'Personal Inboxes' section contains a list of checkboxes for users like 'Chris Doc Admin (IMMLAB)', 'Default FI Administrator', 'Jane L. Officer (IMMLAB)', 'John L. Officer (IMMLAB)', 'Stephen B. Manager (IMMLAB)', 'Default Document Administrator', 'Default FI User', 'Joe L. Officer (IMMLAB)', and 'Russ W. Admin (immlab)'. A red box and circle 10 highlight the 'Shared Inboxes' section.

Groups – Inboxes Listing

The following settings are available:

- 1 **Groups tab:** Select the group permissions area.
- 2 **Users tab:** Select a user permission area.
- 3 **Inbox Management tab:** Add, edit and disable shared inboxes. Refer to [Inbox Management](#) on page 100.
- 4 **Select:** Depending on the tab selected above, select a group from the drop-down menu.
- 5 **Workflow-Level Permissions:** The group may have permissions in more than one area.
 - **Builder:** Check this box to give the group access to the Workflow Builder page.
 - **Security:** Check this box to give the group access to the Workflow Permissions and Workflow License Usage pages.
 - **Admin:** Check this box to give the group access to all workflows, inboxes and workflow pages.
- 6 **Group ID:** This is the group as set in your network active directory.
- 7 **Group Name:** This is the group name as set in your network active directory.
- 8 **Workflow Tab:** This area is used to set access for individual workflows.
- 9 **Inboxes Tab:** This area is used to set access to shared and personal inboxes.
- 10 **Shared/Personal Inboxes:** Check these boxes to allow groups the rights to access personal and shared inboxes. Click the title bar to collapse and expand the region.

Users – Workflows

Users – Workflows Listing

The following settings are available:

- 1 **Groups tab:** Select the group permissions area.
- 2 **Users tab:** Select a user permission area.
- 3 **Inbox Management tab:** Add, edit and disable shared inboxes. Refer to [Inbox Management](#) on page 100.
- 4 **Select:** Depending on the tab selected above, select a group from the drop-down menu.
- 5 **Workflow-Level Permissions:** The user may have permissions in more than one area.
 - **Builder:** Check this box to give the user access to the Workflow Builder page.
 - **Security:** Check this box to give the user access to the Workflow Permissions and Workflow License Usage pages.
 - **Admin:** Check this box to give the user access to all workflows, inboxes and workflow pages
 - **Deactivate User:** When checked, a user will not be able to log into the application. (*Only appears in the Users – Workflow page.*)
- 6 **User ID:** This is the user ID as set in your network active directory.
- 7 **User Name:** This is the user name as set in your network active directory.
- 8 **Manager:** This is the user’s manager’s name as set in your network active directory.
- 9 **Email:** This is the user’s email address as set in your network active directory.
- 10 **Workflow Tab:** This area is used to set access for individual workflows.
- 11 **Inboxes Tab:** This area is used to set access to shared and personal inboxes.
- 12 **Active Directory Tab:** This area is used to view Active Directory information for the user who is selected in item 4 **Select** (above).
- 13 **Workflow Permissions:** This area lists all available workflows. Check these boxes to allow users the right to route documents in the workflow. Checking All will allow the user to route documents using any existing and future workflow. If this box is not checked the user will not have items related to that workflow in the Cases window.

Users – Inboxes

Users – Inboxes Listing

The following settings are available:

- 1 **Groups tab:** Select the group permissions area.
- 2 **Users tab:** Select a user permission area.
- 3 **Inbox Management tab:** Add, edit and disable shared inboxes. Refer to [Inbox Management](#) on page 100.
- 4 **Select:** Depending on the tab selected above, select a group from the drop-down menu.
- 5 **Workflow-Level Permissions:** The user may have permissions in more than one area.
 - **Builder:** Check this box to give the user access to the Workflow Builder page.
 - **Security:** Check this box to give the user access to the Workflow Permissions and Workflow License Usage pages.
 - **Admin:** Check this box to give the user access to all workflows, inboxes and workflow pages
 - **Deactivate User:** When checked, a user will not be able to log into the application. (*Only appears in the Users – Workflow page.*)
- 6 **User ID:** This is the user ID as set in your network active directory.
- 7 **User Name:** This is the user name as set in your network active directory.
- 8 **Manager:** This is the user's manager's name as set in your network active directory.
- 9 **Email:** This is the user's email address as set in your network active directory.
- 10 **Workflow Tab:** This area is used to set access for individual workflows.
- 11 **Inboxes Tab:** This area is used to set access to shared and personal inboxes.

- 12 **Active Directory Tab:** This area is used to view Active Directory information for the user who is selected in item 4 **Select** (above).
- 13 **Shared/Personal Inboxes:** Check these boxes to allow users the rights to access personal and shared inboxes. Click the title bar to collapse and expand the region.

Users – Active Directory

Select a user to see the following information:

The screenshot shows the 'Workflow Permissions' page in IMM eSign. The 'Users' tab is selected. The user 'Jane L. Officer' is selected, and the 'Active Directory' button is highlighted. The 'Active Directory Information' section shows the following details:

User	janeofficer
Personal Inbox	Jane L. Officer
Domain	IMMLAB
User Full Name	Jane L. Officer
User Manager Name	Stephen B. Manager
User Role	Manager, Administrator, Designer
Authenticated	True
Groups/Sub Groups	IMMLendingdocs, IMMFCUdocs, TeAGroup

The 'Group Permissions' section shows the following details:

Group	Workflows
IMMLendingDocs	Car Loan
IMMFCUdocs	

The 'User Permissions' section shows the following details:

Workflows	All Workflows
Inboxes	All Inboxes

The 'Inherited Permissions' section shows the following details:

Groups	
Workflows	
Inboxes	

Users – Active Directory Listing

The following settings are available:

- 1 Groups tab:** Select the group permissions area.
- 2 Users tab:** Select a user permission area.
- 3 Inbox Management tab:** Add, edit and disable shared inboxes. Refer to [Inbox Management](#) on page 100.

- 4 **Select:** Depending on the tab selected above, select a group from the drop-down menu.
- 5 **Workflow-Level Permissions:** The user may have permissions in more than one area.
 - **Builder:** Check this box to give the user access to the Workflow Builder page.
 - **Security:** Check this box to give the user access to the Workflow Permissions and Workflow License Usage pages.
 - **Admin:** Check this box to give the user access to all workflows, inboxes and workflow pages
 - **Deactivate User:** When checked, a user will not be able to log into the application. (*Only appears in the Users – Workflow page.*)
- 6 **User ID:** This is the user ID as set in your network active directory.
- 7 **User Name:** This is the user name as set in your network active directory.
- 8 **Manager:** This is the user's manager's name as set in your network active directory.
- 9 **Email:** This is the user's email address as set in your network active directory.
- 10 **Workflow Tab:** This area is used to set access for individual workflows.
- 11 **Inboxes Tab:** This area is used to set access to shared and personal inboxes.
- 12 **Active Directory Tab:** This area is used to view Active Directory information for the user who is selected in item 4 **Select** (above).
- 13 **Active Directory Information:** This is a reference of information listed in your network Active Directory settings for the selected user. The Inherited Permissions pane lists Group, Workflow and Inbox permissions.

Inbox Management

This section is used to add, edit and disable shared inboxes, which are shared by multiple users. To enable this feature, shared inboxes must be set up. Email addresses are optional and can be used to receive notifications.

The screenshot shows the 'Inbox Management' section of the IMM eSign interface. It features a table with the following data:

Inbox Name	Email ID	Disabled
<input type="checkbox"/> BranchManagers	branchmanager@YourFI.com	False
<input type="checkbox"/> Card Services		False
<input type="checkbox"/> IMMLendingDocs	lending@YourFI.com	False
<input type="checkbox"/> LendingDocs	Lending@YourFI.com	False
<input type="checkbox"/> Operations		False
<input type="checkbox"/> Remote Inbox		False
<input type="checkbox"/> Sample Shared Inbox	SharedInbox@YourFI.com	False

Inboxes being used in workflows cannot be disabled.

To modify inbox information,

- 1 Check a checkbox for an inbox to be edited.
- 2 Click **Edit**.

The Modify Inbox popup is displayed.

The 'Modify Inbox' popup form contains the following fields and buttons:

- Inbox Name:** Sample Shared Inbox
- Email Id:** SharedInbox@YourFI.com
- Disable Inbox:**
- Buttons:** Save (highlighted with a red box), Cancel

Modify information as necessary.

Click **Save**.

Workflow License Usage

When workflow is activated, each Financial Institution is assigned a number of licenses. These licenses allow users to log into the workflow area. If all licenses are currently applied to active users, when additional users process document sets into workflows, a popup warning is displayed.

The administrator can log users out to prevent popups from displaying for additional users.

Click **Administration > Workflow License Usage**.

Session ID	License Key	User Name	Device	Login Time	Logout
51C8F2D6-8193-46C8-86EB-B68013B65C07	248A3391-3159-4F08-80D5-F2C804C90F57	John L. Officer	WindowDesktop	Oct 23 2018 10:34AM	<input type="checkbox"/> Logout
A81BAD99-19BB-41E6-BB92-8905992E80F6	2BBA4BF2-84A3-46C6-96F2-80AA0D704C9A	Russ W. Administrator	WindowDesktop	Oct 24 2018 8:37AM	<input type="checkbox"/> Logout
8D16D626-91A2-4981-BF1E-91C1C5BF4B55	3C08CFF2-5E4C-413B-9A45-E07EF48E00C7	Jane L. Officer	WindowDesktop	Oct 23 2018 10:18AM	<input type="checkbox"/> Logout
2D25D339-3D29-43A6-B81C-9B15644F6889	4BC047A3-CC8E-4AEF-8F28-0358E294755C	Joe L. Officer	WindowDesktop	Oct 23 2018 10:38AM	<input type="checkbox"/> Logout

This screen lists all users currently logged into TeA Workflow.

To log a user out:

- 1 Check the checkbox on the user row.
- 2 Click the Logout link.

Click **OK** to the message popup.

Criteria Maintenance (XML)



Please **Contact IMM** for assistance with creating or working with criteria.

Criteria are conditional statements that will disable documents if the condition is FALSE and enable the documents if the condition is TRUE. Criteria is triggered based on the host data file's target field and value.

Administrators may use this option to add, edit and delete criteria.

For example, Power of Attorney (POA) forms vary from state to state. By defining criteria for each state that an FI does business in and associating those criteria to the different POA forms an administrator can assure that only the correct form will be processed.

Click **Administration > Criteria**.

Criteria Name	Condition	Description
Home Loan	//*[/*[LNPURP_DESC='Home Loan']	Only used for Home Loans
NJ State	//*[P_PRI_ADDR_STATE='NJ']	New Jersey State
None		Default Criteria
NY State	//*[P_PRI_ADDR_STATE='NY']	New York State
OR State	//*[P_PRI_ADDR_STATE='OR']	Oregon State

Displaying criteria: 1 through 5. Total criteria available: 5

Criteria Reference Material

Criteria conditions in IMM eSign plus can be any valid XPath expression. IMM eSign plus evaluates this XPath expression for the transformed/orig xml file created (XML sent by the host is processed with our XSL which then creates the transformed/orig file) and counts the nodes that satisfy the XPath condition. If the node count is greater than 1, then the document that has the criteria attached is available for processing. If the node count is 0, then the document is not available for processing.

Some of the commonly used operators/functions are listed below with examples:

Operator/Function	Criteria Condition	Converted XPath Expression ¹	Description
=	APP1_ADDR_CITY='New York'	//*[APP1_ADDR_CITY='New York']	Criteria to match the applicant 1 city to 'new York'
!=	APP1_ADDR_CITY!='New York'	//*[APP1_ADDR_CITY!='New York']	Criteria to match the applicant 1 city not equal to 'new York'
<	APP1_DOB_YEAR<'1970'	//*[APP1_DOB_YEAR<'1970']	Criteria to match applicant DOB less than 1970
<=	APP1_DOB_YEAR<='1970'	//*[APP1_DOB_YEAR<='1970']	Criteria to match applicant DOB less than or equal to 1970
>	APP1_DOB_YEAR>'1970'	//*[APP1_DOB_YEAR>'1970']	Criteria to match applicant DOB greater than 1970
>=	APP1_DOB_YEAR>='1970'	//*[APP1_DOB_YEAR>='1970']	Criteria to match applicant DOB greater than or equal to 1970

or	APP1_ADDR_ZIP='12121' or APP1_ADDR_ZIP='21212'	//*[APP1_ADDR_ZIP='12121' or APP1_ADDR_ZIP='21212']	Criteria to match applicant 1 zip to 12121 or 21212
and	APP1_ADDR_ZIP='12121' and APP1_DOB_YEAR<='1970'	//*[APP1_ADDR_ZIP='12121' and APP1_DOB_YEAR<='1970']	Criteria to match zip to 12121 and DOB year less than or equal to 1970.
substring	substring(APP1_DOB_YEAR,1,3)= '197'	//*[substring(APP1_DOB_YEAR,1,3)= '197']	Criteria to match applicant DOB from 1970 to 1980.
Mixed Condition 1	(APP1_ADDR_ZIP='07201' or APP1_ADDR_ZIP='07202' or APP1_ADDR_ZIP='07206') and (SNR1_FULL_NAME_FML!='' and SNR2_FULL_NAME_FML!='' and SNR3_FULL_NAME_FML!='')	//*[(APP1_ADDR_ZIP='07201' or APP1_ADDR_ZIP='07202' or APP1_ADDR_ZIP='07206') and (SNR1_FULL_NAME_FML!='' and SNR2_FULL_NAME_FML!='' and SNR3_FULL_NAME_FML!='')]	Criteria to match applicant 1 living in Elizabeth, NJ and the document requires three signers
Mixed Condition 2	(APP1_ADDR_ST='NY' or APP1_ADDR_ST='NJ') and APP1_DOB_YYYY<'1956'	//*[(APP1_ADDR_ST='NY' or APP1_ADDR_ST='NJ') and APP1_DOB_YYYY<'1956']	Criteria to match applicant 1 living in either NY or NJ and being at least 50 years old

¹ '//*[' will be added at the beginning and ']' at the end automatically to make it a valid XPath expression.

Notes:

Connectors are case-sensitive. Use "or" and "and", not "OR" and "AND"

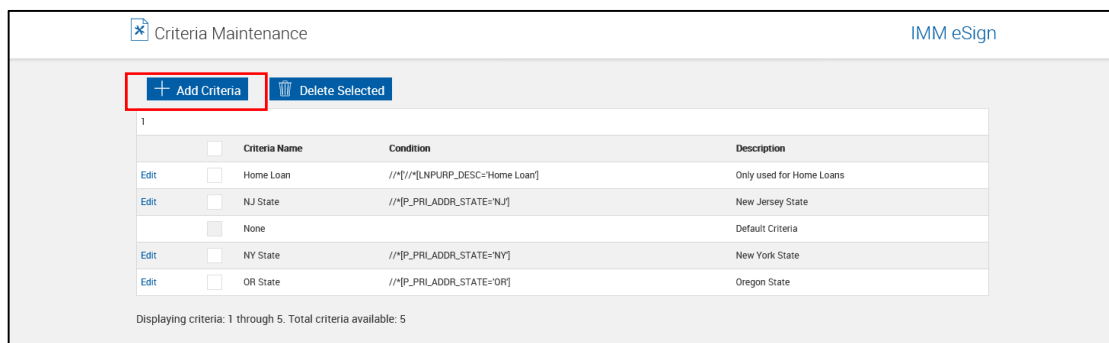
In complex expressions, enclose similar expressions in parentheses to control the order in which they are handled. For example, in Mixed Condition 1, the Zip Codes will be evaluated first, then the signers' names, then the combination of the two.

Please refer to http://www.w3schools.com/xpath/xpath_syntax.asp for other operators supported in XPath string.

Please refer to http://www.w3schools.com/xpath/xpath_functions.asp for using various other functions in the XPath string.

Add Criteria

- From the Criteria Maintenance page,
Click **Add Criteria**.



2 A new line opens.

The screenshot shows the 'Criteria Maintenance' page in IMM eSign. At the top left, there is a close button and the page title 'Criteria Maintenance'. At the top right, the logo 'IMM eSign' is displayed. Below the header, there is a '+ Add Criteria' button. The main content is a table with the following structure:

	Criteria Name	Condition	Description
1			
Update Criteria	Test DOB	//*[APP1_DOB_YEAR<'1970']	Date of Birth Prior to 1970
Edit	Home Loan	//*[!(LNPURP_DESC='Home Loan']	Only used for Home Loans
Edit	NJ State	//*[P_PRLADDR_STATE='NJ']	New Jersey State
	None		Default Criteria
Edit	NY State	//*[P_PRLADDR_STATE='NY']	New York State
Edit	OR State	//*[P_PRLADDR_STATE='OR']	Oregon State

At the bottom of the table, it says 'Displaying criteria: 1 through 6. Total criteria available: 6'.

The following fields are now active.

- Criteria Name: The name of the criteria.
- Condition: The criteria condition can be any valid XPath expression.
- Description: The description of the criteria.

After completing all fields,

Click **Update** to save the changes.

The Criteria Maintenance page refreshes, displaying the new criteria.

Edit Criteria

From the Criteria Maintenance page,

Click **Edit** to the left of the criteria you want to edit.

The *Criteria Name*, *Condition* and *Description* fields are now available to edit.

Enter any necessary changes.

Click **Update**.

Apply Criteria to Documents

After criteria have been defined they must be attached to a document in order to be effective.

From the **Documents – (XML)** Document Maintenance page,

Click **Edit** next to the document to be edited.

The Document Maintenance page refreshes with the document fields unlocked for editing.

The screenshot shows the 'Documents Maintenance (XML)' page. At the top, there is a search bar and several action buttons: 'Upload Documents', 'Delete Selected', 'Define Attachment', and 'Export'. Below this is a table with columns: Document Name, Description, Dictionary, Criteria, Recurring Type, Display Document While Processing, Electronic Vault Document, and Show Other App In App Section. A dropdown menu is open for the 'Criteria' field of the first document, showing options: Home Loan, NJ State, None, NY State, OR State, and Test DOB. The 'None' option is highlighted.

- **Criteria:** Select from the dropdown menu.

The Document Maintenance page refreshes showing your selection.

Click **Update** to save the changes.

Delete Criteria



When a criterion is associated with a document and that criterion is deleted, the Criteria field in the Document Maintenance page resets to None.

From the Criteria Maintenance page,

The screenshot shows the 'Criteria Maintenance' page. At the top, there are buttons for '+ Add Criteria' and 'Delete Selected'. Below is a table with columns: Criteria Name, Condition, and Description. The table lists five criteria: Home Loan, NJ State, None, NY State, and OR State. Red callouts are present: '1' points to a checkbox next to 'Home Loan', '2' points to a checkbox at the top of the 'Criteria Name' column, and '3' points to the 'Delete Selected' button. The text 'Displaying criteria: 1 through 5. Total criteria available: 5' is at the bottom.

- 1 Check the box to the left of the criteria to be deleted.

- 2 Check the box at the top of the column to select all.



Clicking Delete Selected will delete the criteria with *no warning confirmation*.

- 3 Click **Delete Selected**.

Index Fields

Use this page to define the fields that are used to name and search for your archived PDF documents. Indexes may be applied in any order on the [Imaging Systems](#) page. Indexes may be associated with multiple dictionaries. Each FI can have a maximum of 20 indexes.

The fields and values displayed on this screen are applied to all documents indexed for a Financial Institution.



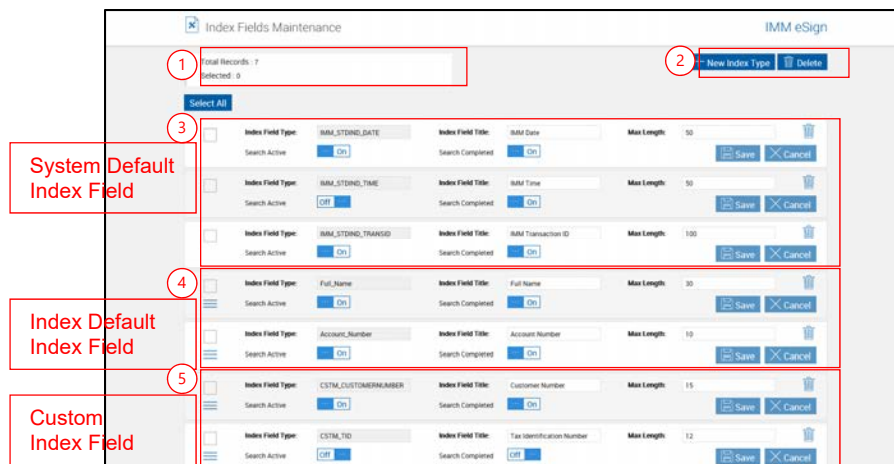
Change settings only when there are **no users** on the system (before or after office hours).

IMM **recommends** you have the IMM installer setup this screen.

IMM ***strongly recommends*** that any Index Field changes are made *prior to* TotaleAtlas operation.

Click **Administration > Index Fields**.

The Index Fields Maintenance page appears.



Index Fields Items

1 Index information:

- Index Fields count
- Index Fields Selected count

2 Action Buttons:

- (Add) New Index Type
- Delete (Selected)

3/4 Default Index Fields: Can be edited and deleted.

5 Custom Index Fields: Can be edited and deleted. (Legacy installations may use the "CSTM_" prefix for custom index fields.)

Click an index field row to expand.

Index Row Expanded

- 1 **Delete button:** Used with 2 **Selection Check Box** to delete selected index rows.
- 2 **Selection Check Box:** Select an index row for deletion with 1 **Delete** button.
- 3 **Index Field Type:** Base name of the index field. The Index Field Type cannot be changed. (Legacy installations may use the “CSTM_” prefix for custom index fields.) **[Required]**
- 4 **Index Field Title:** This title is used as the Index column title or Index Search Field title in IMM eSign plus.) **[Required]**
- 5 **Max Length:** A numeric length of the field. **[Required]**
- 6 **Delete icon:** Delete the current index rows.
- 7 **Search Active:** When this On, the index field will appear as a default search parameter on the Search Active Sessions page in the IMM eSign plus interface. **[Optional]**
- 8 **Search Completed:** When this On, the index field will appear as a default search parameter on the search parameter on the Search Completed page in the IMM eSign plus interface. **[Optional]**
- 9 **Dictionary Code:** The name of the dictionary using this index row item. The index item may be used in multiple dictionaries.
- 10 **Index Field Name:** The index field name used with the selected dictionary. The Index Field Name cannot be changed when associated with the Synergy eSign Suite Dictionary. **[Required]**

- 11 **Default Value:** The value displayed for this field when processing.
- 12 **Use for Imaging:** When this On, imaging will use the field in indexing. Only fields marked for imaging will be available for Document Level Indexing. [**Optional**]
- 13 **Display Index:** When this is On, the index will display on the Documents tab in expanded documents for Search Active results, Search Completed results and eSignature Management expanded documents listings. [**Optional**]
- 14 **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**]
- 15 **Imaging Index Title:** A field name in a generated XML, used by the imaging system. [**Optional**]
- 16 **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). [**Optional**]
- 17 **Formatted:** This informs an external index database that eAtlas data for that index field is formatted. (Checked – eSign data is formatted. Not checked – eSign data is not formatted.). [**Optional**]
- 18 **Functions:** 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. [**Optional**]

After entering the required field information,

- 19 Action Buttons:
 - **Save:** Click this button to save changes.
 - **Cancel:** Click to cancel changes to an index.

Add New Index Field

Click the **New Index Type** button.

The page refreshes with all field items unlocked.

For each applicable Dictionary Code, complete the following, as necessary.

- 1 **Index Field Type:** Enter the Index Field Name. Base name of the index field. The Index Field Type cannot be changed. (Legacy installations may use the “CSTM_” prefix for custom index fields.) **[Required]**.
- 2 **Title:** Enter the Title of the Index Name. This title is used as the Index column title or Index Search Field title in IMM eSign plus.) **[Required]**
- 3 **Max Length:** A numeric length of the field. **[Required]**
- 4 **Search Active:** When this On, the index field will appear as a default search parameter on the Search Active Sessions page in the IMM eSign plus interface. **[Optional]**
- 5 **Search Completed:** When this On, the index field will appear as a default search parameter on the search parameter on the Search Completed page in the IMM eSign plus interface. **[Optional]**

- 6 **Dictionary Code:** The name of the dictionary using this index row item. The index item may be used in multiple dictionaries.
- 7 **Index Field Name:** The index field name used with the selected dictionary. The Index Field Name cannot be changed when associated with the Synergy eSign Suite Dictionary. **[Required]**
- 8 **Default Value:** The value displayed for this field when processing.
- 9 **Use for Imaging:** When this On, imaging will use the field in indexing. Only fields marked for imaging will be available for Document Level Indexing. **[Optional]**
- 10 **Display Index:** When this is On, the index will display on the Documents tab in expanded documents for Search Active results, Search Completed results and eSignature Management expanded documents listings. **[Optional]**
- 11 **External Index Title:** A field name in a generated XML, used by the imaging system. **[Optional]**
- 12 **Imaging Index Title:** A field name in a generated XML, used by the imaging system. **[Optional]**
- 13 **SmartIndex 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). **[Optional]**
- 14 **Formatted:** This informs an external index database that eAtlas data for that index field is formatted. (Checked – eSign data is formatted. Not checked – eSign data is not formatted.). **[Optional]**
- 15 **Function:** 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. **[Optional]**
- 16 **Action Buttons:**
 - **Save:** Click this button to save changes.
 - **Cancel:** Click to cancel changes to an index.

Edit Index Field

Edit Field Information

From the Index Fields Maintenance page,
Click an Index row.

The screenshot shows the 'Index Fields Maintenance' interface. At the top, it displays 'Total Records : 7' and 'Selected : 0'. There are buttons for '+ New Index Type' and 'Delete'. A 'Select All' button is also present. Below this is a table of index fields:

Index Field Type	Index Field Title	Max Length
IMM_STDIND_DATE	IMM Date	50
IMM_STDIND_TIME	IMM Time	50
IMM_STDIND_TRANSID	IMM Transaction ID	100
Full_Name	Full Name	30

Each row has 'Search Active' and 'Search Completed' status indicators, and 'Save' and 'Cancel' buttons. A red arrow labeled 'Click' points to the first row. Blue boxes on the right label the rows as 'Index Row 1' through 'Index Row 4'.

The Index row expands listing and shows all settings for all associated dictionaries.

The screenshot shows the expanded view of the 'Full_Name' index field. It displays settings for three dictionaries:

- Dictionary Code: TeSign Documents**
Index Field Name: Full_Name
Default Value: []
Use for Imaging: On
Display Index: On
External Index Title: []
Imaging Index Title: []
Smart Index Lookup: Off
Formatted: Off
Functions: []
- Dictionary Code: Lending Documents**
Index Field Name: P_D1NAME
Default Value: []
Use for Imaging: Off
Display Index: On
External Index Title: []
Imaging Index Title: []
Functions: []
- Dictionary Code: Membership Documents**
Index Field Name: P_D1NAME
Default Value: []
Use for Imaging: Off
Display Index: On
External Index Title: []
Imaging Index Title: []
Functions: []

A red box highlights the expanded view, and a red arrow points from the 'Click' label in the previous screenshot to this view. At the bottom right of the expanded view, there are 'Save' and 'Cancel' buttons.

Make changes as necessary.

Click **Save**.

Reorder Index Field



Change settings only when there are **no users** on the system (before or after office hours).

IMM **recommends** you have the IMM installer setup this screen.

IMM **strongly recommends** that any Index Field changes are made *prior to* TotaleAtlas operation.

System default fields cannot be reordered.

The screenshot shows the 'Index Fields Maintenance' interface. At the top, it displays 'Total Records : 7' and 'Selected : 0'. There are buttons for '+ New index Type' and 'Delete'. A 'Select All' button is also present. The main area contains a list of index fields with the following details:

Index Field Type	Index Field Title	Max Length	Search Active	Search Completed	Buttons
IMM_STDIND_DATE	IMM Date	50	On	On	Save, Cancel, Reorder
IMM_STDIND_TIME	IMM Time	50	Off	On	Save, Cancel, Reorder
IMM_STDIND_TRANSID	IMM Transaction ID	100	On	On	Save, Cancel, Reorder
Full_Name	Full Name	30	On	On	Save, Cancel, Reorder
Account_Number	Account Number	10	On	On	Save, Cancel, Reorder
CSTM_CUSTOMERNUMBER	Customer Number	15	On	On	Save, Cancel, Reorder
CSTM_TID	Tax Identification Number	12	Off	Off	Save, Cancel, Reorder

Annotations: A red box labeled 'No Reordering' encompasses the first three rows. Red arrows labeled 'Reorder Buttons' point to the reorder icons on the last three rows.

Click the reorder button and drag the index field to a new location.

Delete Index Field

The screenshot shows the 'Index Fields Maintenance' page. At the top, there are buttons for '+ New Index Type' and 'Delete'. Below this, a table lists index fields. The first row is selected, and a red arrow labeled '1' points to its checkbox. A second red arrow labeled '2' points from the 'Delete' button to the 'Delete Selected' button.

Index Field Type	Index Field Title	Max Length	Search Active	Search Completed	Save	Cancel
IMM_STDIND_DATE	IMM Date	50	On	On	Save	Cancel
IMM_STDIND_TIME	IMM Time	50	Off	On	Save	Cancel
IMM_STDIND_TRANSID	IMM Transaction ID	100	On	On	Save	Cancel
Full_Name	Full Name	30	On	On	Save	Cancel

Below the table, there are sections for 'Dictionary Code: TeSign Documents' and 'Dictionary Code: Lending Documents', each with fields for 'Index Field Name', 'Default Value', 'Use for Imaging', 'Display Index', 'External Index Title', 'Imaging Index Title', 'Smart Index Lookup', and 'Formatted'.

- 1 Check the checkbox to the left of the custom field to be deleted.
- 2 Click **Delete Selected**.

A warning window appears.

Click **OK**.

The field is deleted.

Reindex Documents (Workflow)



This feature is only available in Workflow installations.

1. *DocQ* is a generic term for *Active Sessions*.
2. The index/search fields used in this guide are sample fields only. Your search fields may differ.
3. The index/search fields that display depend on the index fields that have been defined in
 - a. eSign Admin Manager (Refer to View/Edit Index Types or Define Custom Index Types in the eSign Admin Manager Administrator Guide.) or
 - b. **Index Fields** (page 106).

Your search fields may differ.

4. Active Sessions are stored for the time period specified in the **Retain Active Sessions (Days)** setting on page 132. This setting also controls the length of time a document will be retained after being edited.

This feature allows the FI Administrator to view Indexed and Non-Indexed documents and apply re-indexing to documents as necessary.

Click **Administration > Reindex Documents**.

The screenshot shows the 'Reindex Documents' interface. At the top, there is a search bar with a magnifying glass icon and a pin icon. Below the search bar, there are several filter sections: 'Platform' with a dropdown menu, 'Date Range' with a date input field, 'Full Name' with a text input field, 'Account Number' with a text input field, 'Customer Number' with a text input field, 'Users' with a dropdown menu, and 'Advanced Search' with a blue button. At the bottom, there are radio buttons for 'Indexed', 'Not Indexed', and 'All', and a 'Search' button with a magnifying glass icon and a 'Clear' button with an 'X' icon.

Select search parameters. As the Workflow Administrator, clicking Search with no parameters will list all sessions.

- 1 **Title Bar:** Click the title bar area to expand/minimize the Parameters Input pane.
- 2 **Pin/Unpin:** Click the pin to display or collapse the search parameters section of the page when the results are displayed.
- 3 **Platform:** Select a platform from the drop-down menu, previously referred to as a dictionary.



- 4 **Date Range:** Select a From/To Date for the report. Click the Date Range text box. (Refer to [Date Range Selection](#) on page 174).
- 5 **Index Fields:** Enter any additional search criteria in the index field textboxes. Refer to [Search Hints](#) on page 172.
- 6 **Users:** Click the field to search for documents belonging to one or more specific users. Choose from the dropdown list. Leave the field blank to search for documents owned by all users. Click outside the field to close the dropdown menu.
- 7 **Advanced Search:** Click to display additional search index fields.
- 8 **Indexing:** Select **Indexed** to display documents that have been indexed, select **Not Indexed** to display documents that have not been indexed, or select **All** to display all documents.
- 9 **Action Buttons:**
 - Click **Search** to continue.
 - Click **Clear** to reset the search parameters.

The Reindex Documents page refreshes with the search results.



- 1 **Search Parameter:** Previously explained
- 2 **Reindex:** Click to reindex documents selected with 4 **Select All** or 7 **Selection Checkboxes**.
- 3 **Export:** Click to export the displayed list to a .csv file.
- 4 **Select All:** Click to select all listed documents.

- 5 **Sort by:** Select Date Completed or Name, Ascending or Descending.
- 6 **Default record display:** Click to expand and display additional document information.

Default Document Listing

<input type="checkbox"/>	Name: JOHN SMITH Document Name: TeA-Audit Platform: Lending Documents-[LEND] Date Completed: 11/26/18 1:24 PM	Full Name: JOHN SMITH Account Number: 11223344 Customer Number: Tax Identification Number:	 
--------------------------	------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------

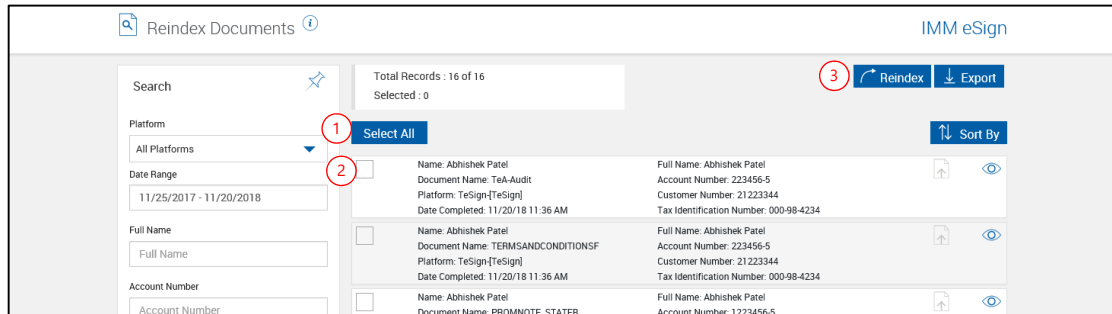
Expanded Document Listing

<input type="checkbox"/>	Name: JOHN SMITH Document Name: TeA-Audit Platform: Lending Documents-[LEND] Date Completed: 11/26/18 1:24 PM Completed by: Johnofficer Document Set: CarLoan	Full Name: JOHN SMITH Account Number: 11223344 Customer Number: Tax Identification Number: Session ID: 201811261306339317711_t2z3oxnulbt...	 
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- 7 **Selection Check box:** Select multiple sessions by clicking selection checkboxes. Expanded documents can be selected.
- 8 **Document Indexed Icon:** Only displays for indexed documents.
- 9 **Remotely Signed:** Only displays documents that have been signed remotely.
- 10 **Preview:** Click to view the document in a PDF popup window.

To Reindex Documents

- 1 From the Reindex Documents page,

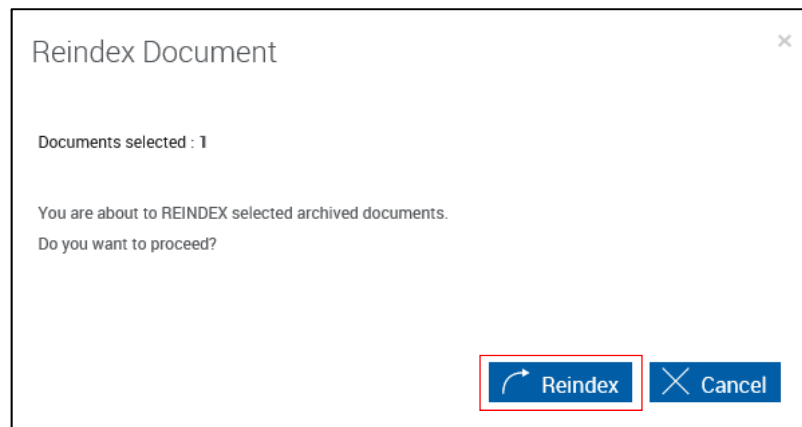


- 1 Click **Select All**.

Or

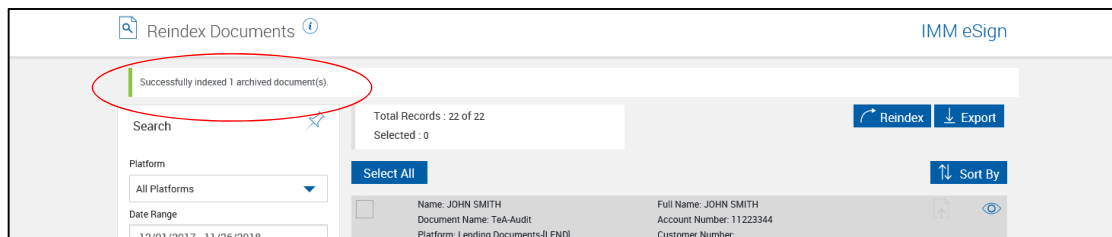
- 2 Select individual Documents.
- 3 Click **Reindex**.

- 2 The Reindex Document confirmation popup displays.



Click Reindex to proceed.

- 3

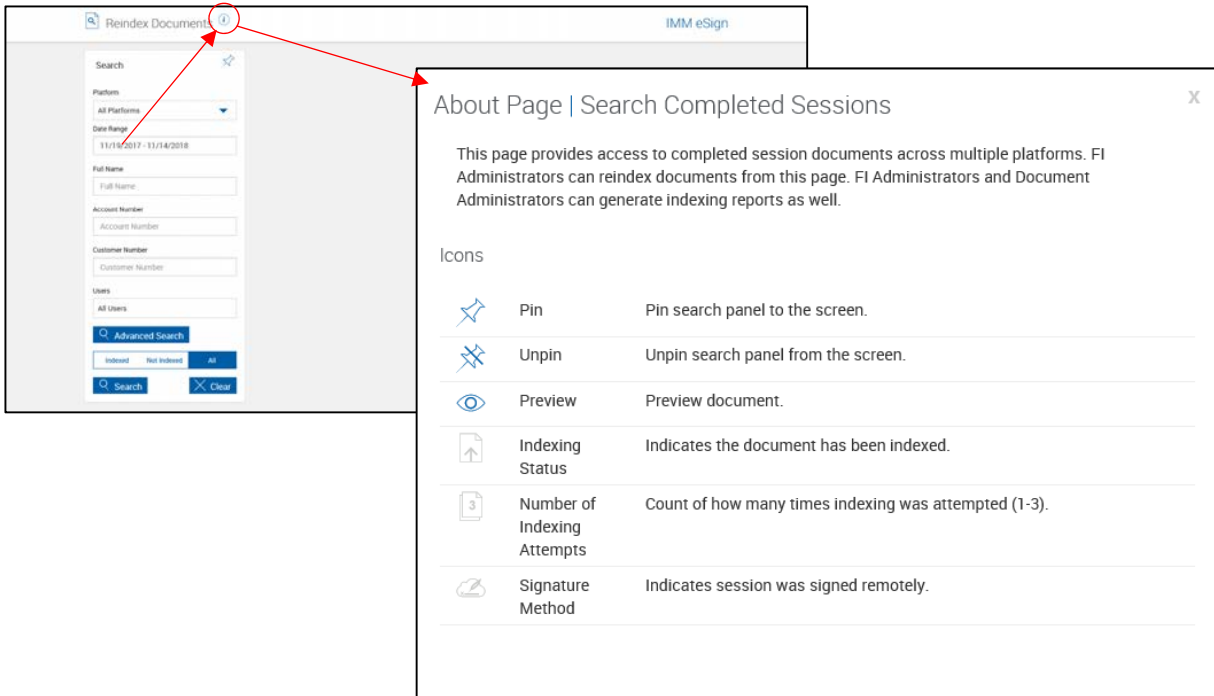


About Page – Reindex Documents

Click **Administration > Reindex Documents**.

The Help button provides a quick listing of icons and functions available and related to the Reindex Documents page.







Click the Page Help button.



The image shows a screenshot of the 'Reindex Documents' page in the IMM eSign application. A red circle highlights a help icon (a question mark) in the top right corner of the page header. A red arrow points from this icon to a help popup window. The popup window is titled 'About Page | Search Completed Sessions' and contains the following text:

This page provides access to completed session documents across multiple platforms. FI Administrators can reindex documents from this page. FI Administrators and Document Administrators can generate indexing reports as well.

Icons

	Pin	Pin search panel to the screen.
	Unpin	Unpin search panel from the screen.
	Preview	Preview document.
	Indexing Status	Indicates the document has been indexed.
	Number of Indexing Attempts	Count of how many times indexing was attempted (1-3).
	Signature Method	Indicates session was signed remotely.

Dictionaries

This option allows the Administrator to modify some dictionary settings.

Click **Administration > Dictionaries**.

The screenshot shows the 'Dictionary Maintenance' page in the IMM eSign system. At the top, there are 'Save' and 'Cancel' buttons. Below them is a table with the following columns: Dict Code, Description, App Prefix, CoApp Prefix, Other App Prefix, Default Recurrence, and Default Attachment Type. Three dictionaries are listed: LEND (Lending Documents), MBR (Membership Documents), and TeSign (TeSign Documents). The 'Default Attachment Type' column contains a dropdown menu for each row. At the bottom, it says 'Displaying records: 1 through 3. Total records available: 3'.

Dict Code	Description	App Prefix	CoApp Prefix	Other App Prefix	Default Recurrence	Default Attachment Type
<input type="checkbox"/> LEND	Lending Documents	P_	C_	0	NonRecurring	Select Default Attachment Type
<input type="checkbox"/> MBR	Membership Documents	A_		JN	None	Select Default Attachment Type
<input type="checkbox"/> TeSign	TeSign Documents				None	Select Default Attachment Type

1 Action Buttons:

- **Save:** Click this button to save changes to the Default Attachment Type.
- **Cancel:** Click to cancel changes to the Default Attachment Type.

2 Column Names:

App Prefix, CoApp Prefix, Other App Prefix and Default Recurrence are not used for your installation.

3 Dictionary Name:

Click to access additional information for the selected dictionary, such as dictionary-level indexes. Refer to [Dictionary Maintenance Additional Information](#) on page 120.

4 Select Default Attachment Type:

Select an attachment type to be displayed as the default attachment type on the Add Documents page when processing sessions.

Dictionary Maintenance Additional Information

After clicking on the dictionary name, the Dictionary Maintenance page refreshes.

Dictionary Maintenance IMM eSign

FI ID: 1 Dict ID: 2

Dict Code: LEND Description: Lending Documents

App Prefix: P_ CoApp Prefix: C_ Other App Prefix: 0

Default Recurrence: NonRecurring

[← Back](#) [Edit](#) [Save](#) [Cancel](#)

Imaging Indexes

Delete Files:

Include Blank Indexes:

Available Indexes	
(X) {Document_Path}	Document Path
(X) {Document_Name}	Document Name
(X) {Document_Set_Name}	Document Set Name
(X) {Archive_Document_ID}	Archive Document ID
(X) {IMM_STDIND_DATE}	IMM Date
(X) {IMM_STDIND_TIME}	IMM Time
(X) {IMM_STDIND_TRANSI...}	IMM Transaction ID
(X) {Full_Name}	Full Name
(X) {CSTM_CUSTOMERNU...}	Customer Number
(X) {CSTM_TID}	Tax Identification Num...

Available Functions

ProfitStars SYNERGY
File Room

Cabinet

Type

Institution

Authority

Vocabulary

Document Name

[Preview](#) [Save](#) [Clear](#)

Refer to the Imaging Index Service Administrator Guide for detailed information on these settings.

Users

This option allows the Administrator to add, edit and delete users. You may also use this option to reactivate a user or reset the user's password if the user gets locked out of the system.

Click **Administration > Users**.

	4	5	6	7	8	9	10
	User ID	Domain	Name	Default Sender Email	Active	Access Level	Last Login
11	ChrisDocAdmin	IMMLAB	Chris Doc Admin	chrisdocadmin@YourFI.com	<input checked="" type="checkbox"/>	DocumentAdmins	12/31/1899 7:00:00 PM
	DocAdmin		Default Document Administrator		<input checked="" type="checkbox"/>	DocumentAdmins	6/17/2018 12:55:31 PM
	FIAdmin		Default FI Administrator		<input checked="" type="checkbox"/>	Administrators	6/21/2018 12:53:54 PM
	FIUser		Default FI User		<input checked="" type="checkbox"/>	Users	6/17/2018 12:55:55 PM
	JaneOfficer	IMMLAB	Jane L. Officer	janeofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM
	JoeOfficer	IMMLAB	Joe L. Officer	joeofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM
	JohnOfficer	IMMLAB	John L. Officer	johnofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	6/21/2018 2:02:19 PM
	RussWAdmin	IMMLAB	Russ W. Admin	russwadmin@YourFI.com	<input checked="" type="checkbox"/>	Administrators	6/25/2018 6:09:41 AM

Displaying Users: 1 through 8. Total Users available: 8

Clicking on **color** column titles sorts the list. Clicking the title alternates between ascending and descending.



Users may be automatically created and activated in eAtlas when documents are processed from eAtlas Client. This setting is controlled by the Host Administrator.

- 1 **Search by User Name:** Filter the search to only include specified users.
 - Enter all or part of a User ID or User Name.
 - Click Search.
- 2 **Add New:** Click to add a new user. Refer to [Add User](#) on page 122.
- 3 **Delete Selected:** Click to delete users selected with 11 Delete Selection Checkbox. Refer to [Delete User](#) on page 127.
- 4 **User ID:** ID created when a user initially processes documents in eSign or when an FI Admin adds a user.
- 5 **Domain:** Domain name detected when the user processes documents in eSign or entered when an FI Admin adds a user.
- 6 **Name:** Logon name of the user added when a user initially processed documents in eSign or when an FI Admin adds a user.
- 7 **Default Sender Email:** This will be the default email address for the user as used on the eSignature Management page when sending documents for remote signature.
- 8 **Active:** A check indicates the user is active and can process documents. This checkbox will be clear for inactive users. Refer to [Edit User](#) on page 123 for more information.
- 9 **Access Level:** The Group the user belongs to. Refer to [Group](#) on page 122 for more information.

- 10 **Last Login:** Displays the time and date when users last logged into the system.
- 11 **Delete Selection Checkbox:** Click to select a user for deletion using 3 Delete Selected.

Add User

On the Users Maintenance page,

Click **Add New**.

The Users Maintenance page refreshes.

The screenshot shows the 'Users Maintenance' page in the IMM eSign application. The page title is 'Users Maintenance' and the user is logged in as 'IMM eSign'. The form contains the following fields and controls:

- 1 User ID: User123
- 2 Domain: YoDomain
- 3 Name: User 123
- 4 Active:
- 5 Group: Users (dropdown menu)
- 6 Default Sender Email: user123@YourFI.com
- 7 Password: [masked]
- 8 Confirm Password: [masked]
- 9 Action Buttons: Back, Edit, Save, Cancel, Reset Password

Complete the following fields.

- 1 **User ID:** Enter a user ID for the new user. (Letters, numbers, dashes or underscores only)
- 2 **Domain:** Enter the expected domain of the user (50 characters maximum). If left blank, the default domain will be used and will not be visible to the user.
- 3 **Name:** Enter the user name (50 characters maximum).
- 4 **Active:** Check to make the user active. When checked, the user can log onto the eSign system. When not checked, the user cannot logon.
- 5 **Group:** Administrators, DocumentAdmins or Users. Users added through this screen who will be processing documents through eSign should be assigned to the Users group. Refer to [Groups and Privileges](#) (page 7) for more information.
- 6 **Default Sender Email:** This will be the default email address for the user as used on the eSignature Management page when sending documents for remote signature.
- 7 **Password:** Enter the password for the user. Users added automatically (dependent on Host Administrator settings) will be assigned a password.
- 8 **Confirm Password:** Reenter the password for the user.

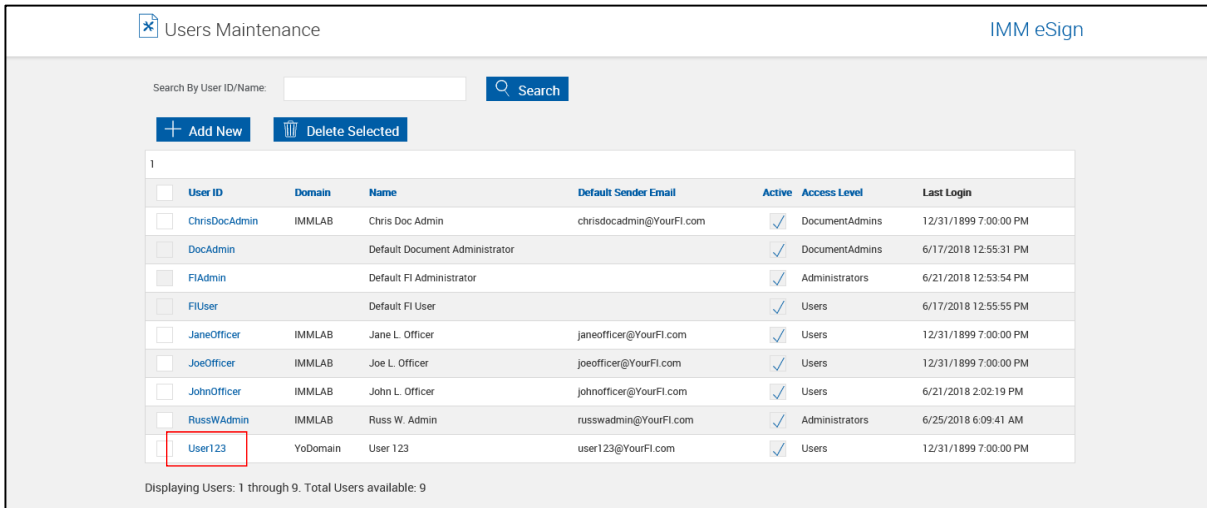


The user password must be at least 8 characters long and must contain one lower-case letter, one upper-case letter and one digit.

- 9 **Action Buttons:** Click **Save**. Click **Back** to return to the Users listing.

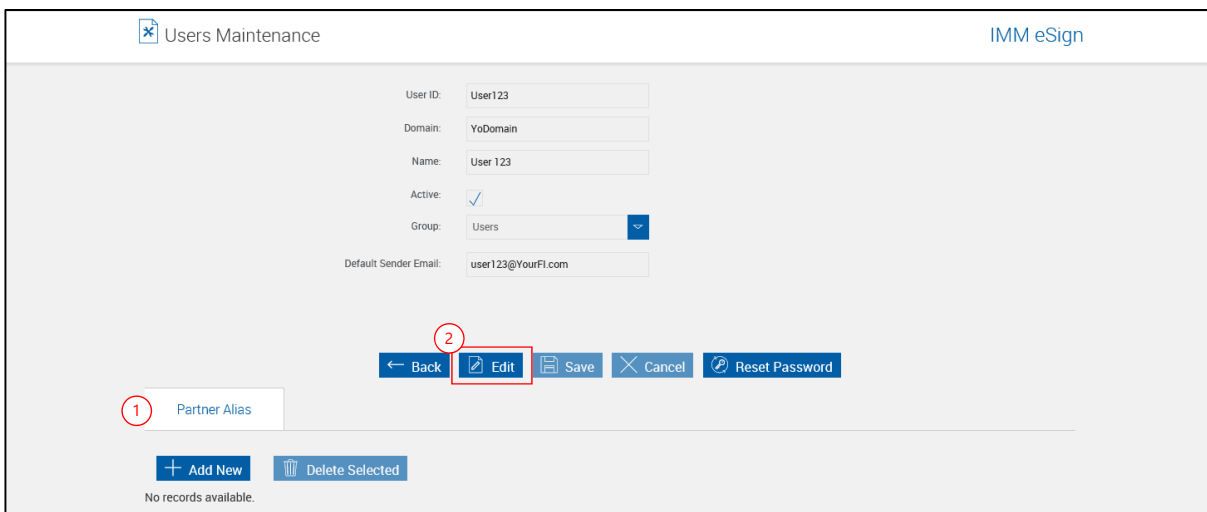
Edit User

From the Users Maintenance screen,



Click the **User ID**.

The Users Maintenance screen refreshes.



- 1 Partner Aliases:** Allows syncing an existing user created for TotaleAtlas with a user alias in host systems that do not specifically conform to Windows credentials. Partner aliases can be established for individual application users. These tie a partner ID with a particular alias name, which would match the UserID for that particular user in the partner document system. During TeSignLite transactions, the alias can be passed as the UserID, and the server will automatically map this to the linked TotaleAtlas user. OnBoard Deposits, MeridianLink, SilverLake, L360 and CIF2020 are the external partner systems currently supported for this.

To edit additional user information,

- 2 Click Edit.**

The Users Maintenance screen refreshes with fields unlocked.

The screenshot shows the 'Users Maintenance' interface. At the top left is a close button and the title 'Users Maintenance'. At the top right is the 'IMM eSign' logo. The main area contains a form with the following fields: 'User ID' (User123), 'Domain' (YoDomain), 'Name' (User 123), 'Active' (checked), 'Group' (Users), and 'Default Sender Email' (user123@YourFI.com). Below the form is a toolbar with buttons: 'Back', 'Edit', 'Save', 'Cancel', and 'Reset Password'. Red circles with numbers 1 through 5 are overlaid on the form and toolbar, with arrows pointing to the Name field, Active checkbox, Group dropdown, Default Sender Email field, and the toolbar buttons respectively.



The User ID and Domain cannot be changed.

- 1 Name:** Enter a new name (50 characters maximum).
- 2 Active:** Enable to make the user active. When checked, the user can log onto the TotaleAtlas system. When not checked, the user cannot logon.
- 3 Group:** Change as necessary. Refer to [Groups and Privileges](#) (page 7) for more information.
- 4 Default Sender Email:** This will be the default email address for the user as used on the eSignature Management page when sending documents for remote signature.
- 5 Action Buttons:** Click **Save**. Click **Back** to return to the Users listing.

Reset Password

If this is your first time to log in as the FI Administrator, IMM recommends that you change your password. Follow this procedure to change any password.

From the Users Maintenance screen,

The screenshot shows the 'Users Maintenance' interface. At the top, there is a search bar labeled 'Search By User ID/Name:' and a 'Search' button. Below the search bar are two buttons: '+ Add New' and 'Delete Selected'. The main area contains a table with the following columns: User ID, Domain, Name, Default Sender Email, Active, Access Level, and Last Login. The table lists several users, and the row for 'User123' is highlighted with a red box. Below the table, it says 'Displaying Users: 1 through 9. Total Users available: 9'.

User ID	Domain	Name	Default Sender Email	Active	Access Level	Last Login
<input type="checkbox"/> ChrisDocAdmin	IMMLAB	Chris Doc Admin	chrisdocadmin@YourFI.com	<input checked="" type="checkbox"/>	DocumentAdmins	12/31/1899 7:00:00 PM
<input type="checkbox"/> DocAdmin		Default Document Administrator		<input checked="" type="checkbox"/>	DocumentAdmins	6/17/2018 12:55:31 PM
<input type="checkbox"/> FIAdmin		Default FI Administrator		<input checked="" type="checkbox"/>	Administrators	6/21/2018 12:53:54 PM
<input type="checkbox"/> FIUser		Default FI User		<input checked="" type="checkbox"/>	Users	6/17/2018 12:55:55 PM
<input type="checkbox"/> JaneOfficer	IMMLAB	Jane L. Officer	janeofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM
<input type="checkbox"/> JoeOfficer	IMMLAB	Joe L. Officer	joeofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM
<input type="checkbox"/> JohnOfficer	IMMLAB	John L. Officer	johnofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	6/21/2018 2:02:19 PM
<input type="checkbox"/> RussWAdmin	IMMLAB	Russ W. Admin	russwadmin@YourFI.com	<input checked="" type="checkbox"/>	Administrators	6/25/2018 6:09:41 AM
<input checked="" type="checkbox"/> User123	YoDomain	User 123	user123@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM

Click the **User ID**.

The Edit User screen refreshes.

The screenshot shows the 'Edit User' screen for 'User123'. The form contains the following fields: User ID (User123), Domain (YoDomain), Name (User 123), Active (checked), Group (Users), and Default Sender Email (user123@YourFI.com). Below the form are several buttons: 'Back', 'Edit', 'Save', 'Cancel', and 'Reset Password'. The 'Reset Password' button is highlighted with a red box. At the bottom, there is a 'Partner Alias' field and two buttons: '+ Add New' and 'Delete Selected'. Below these buttons, it says 'No records available.'

Click **Reset Password**.

The Password and Confirm Password fields display and are active.

The screenshot shows the 'Users Maintenance' interface. The form contains the following fields and controls:

- User ID: User123
- Domain: YoDomain
- Name: User 123
- Active:
- Group: Users (dropdown menu)
- Default Sender Email: user123@YourFI.com
- Password: (highlighted with a red circle and number 1)
- Confirm Password: (highlighted with a red circle and number 2)
- Action Buttons: Back, Edit, Save, Cancel, Reset Password (highlighted with a red box and number 3)



The user password must be at least 8 characters long and must contain one lower-case letter, one upper-case letter and one digit.

Users will be allowed to change their password after signing on.

- 1 Password:** Enter the password for the user. Users added automatically (dependent on Host Administrator settings) will be assigned a password.
- 2 Confirm Password:** Reenter the password for the user.
- 3 Action Buttons:** Click **Save**. Click **Back** to return to the Users listing.

Delete User

From the Users Maintenance screen,

The screenshot shows the 'Users Maintenance' interface. At the top, there is a search bar labeled 'Search User ID/Name:' with a search button. Below the search bar are two buttons: '+ Add New' and 'Delete Selected'. A table lists users with columns: User ID, Domain, Name, Default Sender Email, Active, Access Level, and Last Login. The 'User ID' column has a checkbox at the top. The 'User123' row has a checkbox checked. A red arrow points from the 'Delete Selected' button to the 'User123' row. Another red arrow points from the 'Delete Selected' button to the 'User ID' column header checkbox. A third red arrow points from the 'Delete Selected' button to the checkbox in the 'User123' row.

User ID	Domain	Name	Default Sender Email	Active	Access Level	Last Login	
<input type="checkbox"/>	ChrisDocAdmin	IMMLAB	Chris Doc Admin	chrisdocadmin@YourFI.com	<input checked="" type="checkbox"/>	DocumentAdmins	12/31/1899 7:00:00 PM
<input type="checkbox"/>	DocAdmin		Default Document Administrator		<input checked="" type="checkbox"/>	DocumentAdmins	6/17/2018 12:55:31 PM
<input type="checkbox"/>	FIAdmin		Default FI Administrator		<input checked="" type="checkbox"/>	Administrators	6/21/2018 12:53:54 PM
<input type="checkbox"/>	FIUser		Default FI User		<input checked="" type="checkbox"/>	Users	6/17/2018 12:55:55 PM
<input type="checkbox"/>	JaneOfficer	IMMLAB	Jane L. Officer	janeofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM
<input type="checkbox"/>	JoeOfficer	IMMLAB	Joe L. Officer	joeofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM
<input type="checkbox"/>	JohnOfficer	IMMLAB	John L. Officer	johnofficer@YourFI.com	<input checked="" type="checkbox"/>	Users	6/21/2018 2:02:19 PM
<input type="checkbox"/>	RussWAdmin	IMMLAB	Russ W. Admin	russwadmin@YourFI.com	<input checked="" type="checkbox"/>	Administrators	6/25/2018 6:09:41 AM
<input checked="" type="checkbox"/>	User123	YoDomain	User 123	user123@YourFI.com	<input checked="" type="checkbox"/>	Users	12/31/1899 7:00:00 PM

Displaying Users: 1 through 9. Total Users available: 9



FIAdmin, FIUser and DocAdmin are TeA User IDs and cannot be deleted.

1 Check the checkbox to the left of the user to be deleted.

- Or -

2 Check the checkbox at the top of the column to select all non-default users.

3 Click **Delete Selected**.

A Microsoft Internet Explorer warning window appears.

Click **OK**.

The user is deleted.

General Settings

Click **Administration > General Settings**.

Click **Edit**.

General Settings Page

The General Settings page appears with all fields unlocked.

This page allows the Administrator to set various system settings - such as the image that is to be displayed in the header and how documents are to be archived and indexed.

Fields in the upper section of the page are common and will display with any lower screen tab selected.

The lower section of the page displays additional **Settings Tabs** ¹² which are explained on the following pages.



Not all settings tabs may be available for your installation. Tab contents will vary according to the add-ons and options used during your installation.

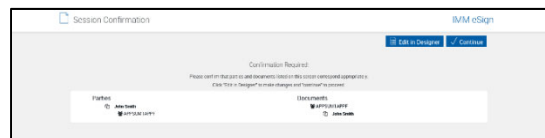
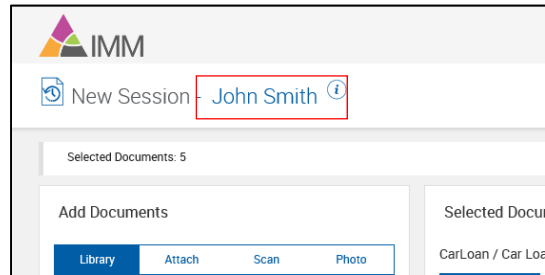
15 Action Buttons: These actions apply to the upper and lower parts of the page.

- **Edit:** Unlocks all visible fields for making changes.
- **Save:** Click to save changed settings.
- **Cancel:** Click if you do not want to save any settings changes.

Edit FI Settings List

In the upper section, the following fields are available for editing:

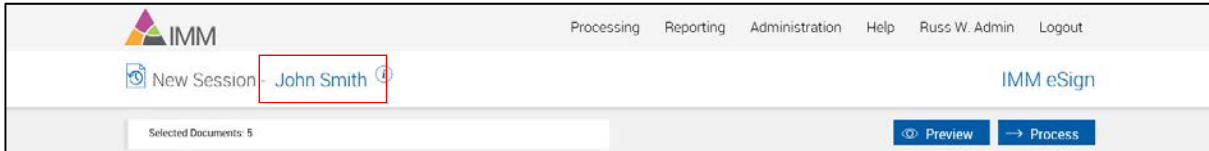
- 1 **Home URL:** The URL for a site when the logo is clicked.
- 2 **Custom Label/URL:** Used to populate custom links to display under **Processing > Custom Links**. IE must be restarted after changing these links.
- 3 **Custom Logo:** Click Browse and choose a graphic file to upload a new logo (GIF or PNG). Click the Upload New Image link or press the Enter key to complete upload.
- 4 **Documents Key:** This is the public key used to decrypt encrypted documents when using TeSignLite. Setting the global key here and then specifying the session- and document-level keys during TeSignLite transactions is required for CSi processing.
- 5 **Allow XML view for users:** (XML installations only) When this is checked, *users* (non-administrators) will be able to click on the primary applicant name and download or view a .zip file containing the contents of the XML data file when one has been passed from the host system.
- 6 **XML View Password:** (XML installations only) When **Allow XML view for users** is checked, users will be required to enter this password to download or view the contents of the XML data file passed from the host.
- 7 **Allow Document Preview:** When this checkbox is checked, Preview links will display on document processing screens. When this checkbox is not checked, Preview links will not display on document processing screens.
- 8 **Remove Option Default:** (XML installations only) When this box is checked, on the Document Selection screen, documents that are added through Select Document Set will have their Remove checkbox checked. This setting is for documents that are part of a document set only and is not used for documents added manually to the document set by using the Add Available Documents link. (Default: Not checked).
- 9 **Retain Audit Trail (Days):** The number of days that rows will be kept in the audit trail tables.
- 10 **Designer Confirmation Screen:** When this checkbox is checked, the Session Confirmation screen appears when a user selects Continue from the Document Designer. When this checkbox is not checked, the Session Confirmation screen will not display.
- 11 **Session Audit Report Time Zone:** Time zone used for Session Audit Report.
- 12 **Password Unlock Period:** (RTS only. Not used by all installations.) The number of minutes the user will have to wait before their password is automatically unlocked. [Time range: 10-3600 minutes. Default: 30 minutes]
- 13 **Unknown Document Label:** Title of documents that shows for undefined documents.
- 14 **Settings Tabs:** Explained on the following pages.
- 15 **Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Edit:** Unlocks all visible fields for making changes.



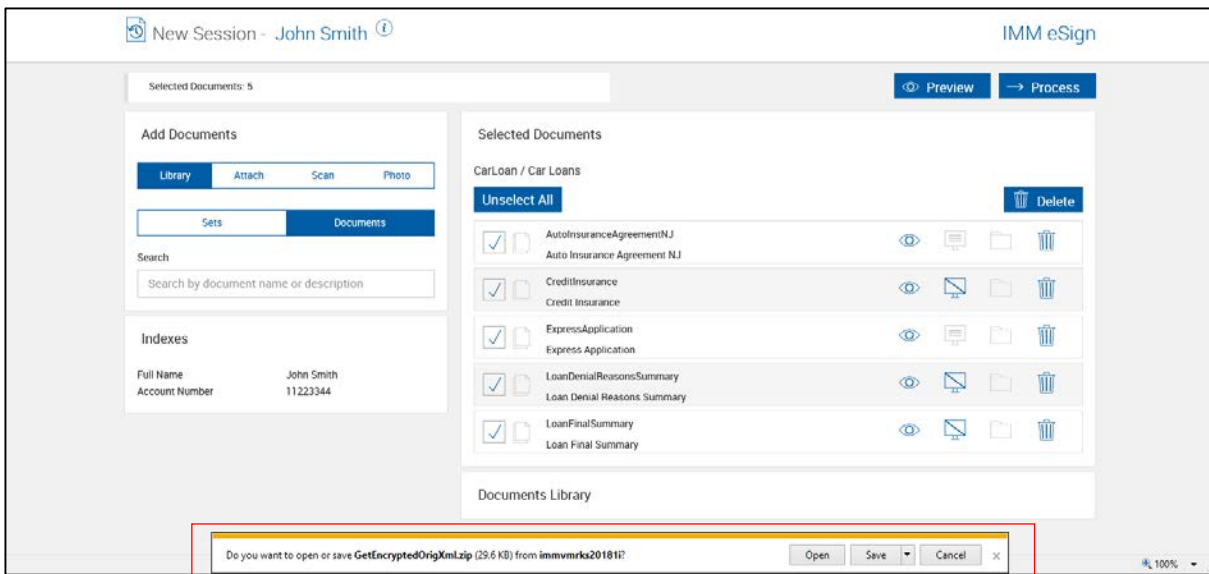
- **Save:** Click to save changed settings.
- **Cancel:** Click if you do not want to save any settings changes.

Open/Save XML View

Click the User Name.



A popup appears on the bottom of the screen.

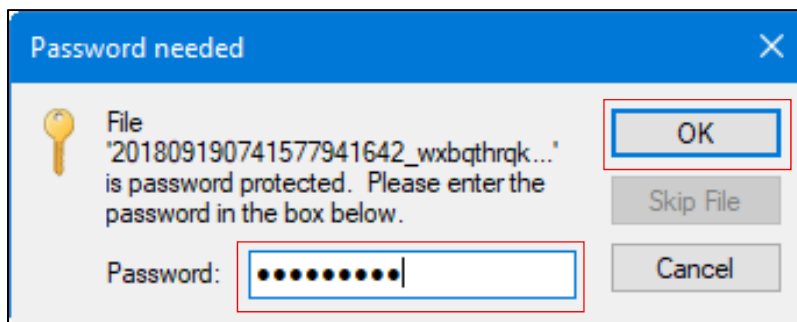


Clicking the Open/Save options creates a password-protected .zip file using the password stored in **XML View Password** (page 129).

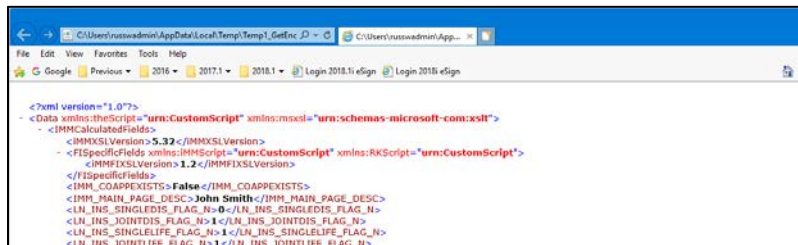
To Open/Open the zip file

Enter the **Password**.

Click **OK**.



By default, the XML file contents appear in a new browser window.



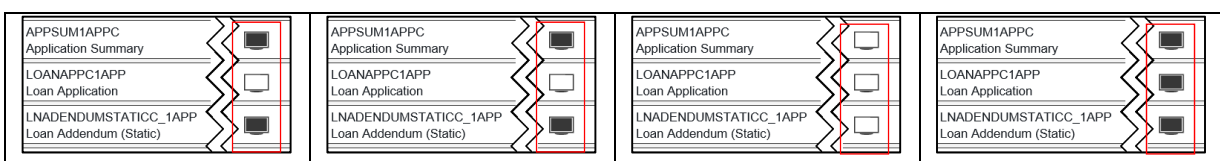
Add-Ons Tab

Add-Ons Tab (Non-Workflow)

The administrator may define how long documents are to be retained in Saved Sessions, and whether to save documents in Saved Sessions by default.

After clicking Edit, the following fields are available for editing.

- 1 **Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Edit:** Unlocks all visible fields for making changes.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click if you do not want to save any settings changes.
- 2 **Retain Active Sessions (Days):** Set number of days that active sessions will be retained, after which they will be deleted (30-90 days – default 90 days).
- 3 **Archive on Session Expiration (Completed Sessions):** When checked, automatically archive sessions that have signature capture complete before they are purged. [Default: Checked]
- 4 **Retrieved Saved Sessions Default:** Determines the state of the display icons when an active session is retrieved. When Preserve Original Selection is selected, Active Sessions retrieved will display showing the original Display icon choices.



<u>Original</u> Document Set	<u>Retrieved</u> Document Set <i>Preserve Original Selection</i>	<u>Retrieved</u> Document Set <i>All Documents Selected</i>	<u>Retrieved</u> Document Set <i>No Documents Selected</i>
------------------------------	---------------------------------------------------------------------	----------------------------------------------------------------	---------------------------------------------------------------

- 5 **Search Active Sessions Filter:** Choose the sessions a **user** will be able to view on the Search Active Session and Session Status pages. The *Administrator* will default to seeing all sessions for all users.
 - **Current User Only:** Only active sessions for the currently logged on user will display on the user Search Active Sessions screen. The Owner filter will not display.
 - **By user, default all:** Active Sessions for all users will be available on the user Search Saved Sessions screen. The Owner filter will display with all users as the default selection.
 - **By user, default current:** Saved Sessions for all users will be available on the user Search Saved Sessions screen. The Owner filter will display with the currently logged on user as the default selection.
- 6 **Loan Coupons Sessions Filter:** This setting applies to the Add-Ons Report. When checked, users will only be able to see their personal activity. When not checked, users will be able to see activity for other users at their FI.
- 7 **Starter Checks Sessions Filter:** This setting applies to the Add-Ons Report. When checked, users will only be able to see their personal activity. When not checked, users will be able to see activity for other users at their FI.
- 8 **Allow users to unlock sessions:** Check the checkbox to allow all users to unlock locked active sessions based on the Active Sessions Search Filter setting (above). When not checked, only the Administrator can unlock sessions.
- 9 **Allow users to delete sessions:** Check the checkbox to allow all users to delete active sessions based on the Active Sessions Search Filter setting (below). When not checked, only the Administrator can remove sessions. Refer to [Delete Sessions](#) on page 28 for an explanation of using the Remove function. [Default: Not Checked]
- 10 **Use common scanner:** Causes all workstations to use a common scanner for attachments. When TeA RTS is installed in a Thin-Client environment, this setting should be checked. When this setting is checked, the UI must be refreshed to display Scanner Settings under the Administrative Screens menu.
- 11 **Enable Work Queue Transfers:** Check the checkbox to allow changing ownership of document set on Search Saved Sessions, Saved Session Details and Document Submitted pages. **User** choices are dependent on the [Search Active Sessions Filter](#). The FI Admin will always see all users. [Default: Checked]
- 12 **BarCode Cover Pages:** Allows the user to upload cover pages for PDF417 barcodes.
- 13 **Loan Coupons Files:** Allows the user to upload a zip file containing the XML and PDF files that support Loan Coupons. [Only appears if the Loan Coupons add-on is activated.]
- 14 **Starter Checks Files:** Allows the user to upload a zip file containing the XML and PDF files that support Starter Checks. [Only appears if the Starter Checks add-on is activated.]
- 15 **Expand Session Details Indexes by Default:** Check the checkbox to have document details expanded in the Sessions Details page. [Default: *Checked*]
- 16 **Download Documents for Session Status (Days):** Number of days to keep physical, archived documents after they are indexed before they are purged. Database records are not modified. [Default: 365]

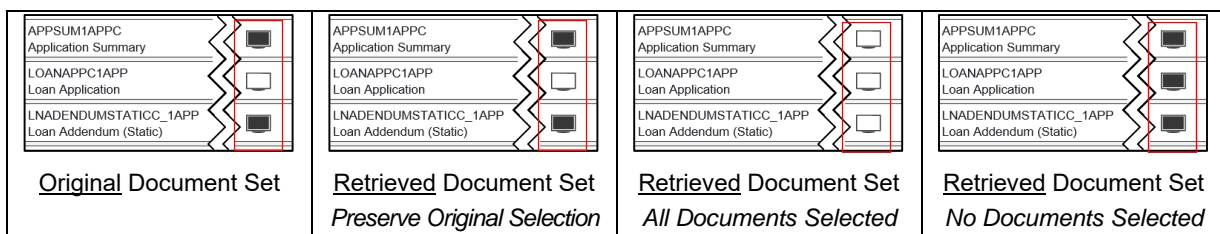
Add-Ons Tab (Workflow)

The administrator may define how long documents are to be retained in Saved Sessions, and whether to save documents in Saved Sessions by default.

After clicking Edit, the following fields are available for editing.

- 1 **Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Edit:** Unlocks all visible fields for making changes.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click if you do not want to save any settings changes.
- 2 **Cases Refresh Rate:** The number of minutes between refreshing the Cases screen. (Default: 5 minutes)
- 3 **Cases Page Size:** The number of cases displayed on the Cases page.
- 4 **Remote Inbox Name:** This setting is used to define the shared inbox into which the download step will be received. This setting must be configured for the remote signing process in workflow to work.
- 5 **Use AD Manager:** When this setting is checked, Manager position information from the FI Active Directory will be used for routing workflows. When this setting is not checked, Manager positions must be defined separately under Workflow Permissions.
- 6 **LightsOut Workflow:** The default workflow for sessions processed in a LightsOut session.
- 7 **AdHoc Workflow:** The default workflow for sessions processed in an AdHoc session.

- 8 **Allow Ad Hoc Document Set:** This setting is used to turn off the Ad-hoc Document checkbox available under Workflow Builder > Document Set tab. This allows processing documents that are not associated with any document set.
- 9 **Retain workflow audit trail:** The number of days that a workflow audit trail is retained. (Default: 365 days)
- 10 **Retain Completed Workflows:** The number of days that completed or cancelled cases will be retained. (Default: 365 days)
- 11 **Title Field Description:** This field is used to change the title of the field description on several screens within IMM eSign plus. When the default of no text is used, the title field defaults to "Name".
- 12 **Retrieved Saved Sessions Default:** Determines the state of the document display icons when an active session is retrieved. When Preserve Original Selection is selected, Active Sessions retrieved will display showing the original Display icon choices.



- 13 **Loan Coupons Sessions Filter:** This setting applies to the Add-Ons Report. When checked, users will only be able to see their personal activity. When not checked, users will be able to see activity for other users at their FI.
- 14 **Starter Checks Sessions Filter:** This setting applies to the Add-Ons Report. When checked, users will only be able to see their personal activity. When not checked, users will be able to see activity for other users at their FI.
- 15 **Use common scanner:** Causes all workstations to use a common scanner for attachments. When TeA RTS is installed in a Thin-Client environment, this setting should be checked. When this setting is checked, the UI must be refreshed to display Scanner Settings under the Administrative Screens menu.
- 16 **BarCode Cover Pages:** Allows the user to upload cover pages for PDF417 barcodes.
- 17 **Loan Coupons Files:** Allows the user to upload a zip file containing the XML and PDF files that support Loan Coupons. [Only appears if the Loan Coupons add-on is activated.]
- 18 **Starter Checks Files:** Allows the user to upload a zip file containing the XML and PDF files that support Starter Checks. [Only appears if the Starter Checks add-on is activated.]
- 19 **Expand Session Details Indexes by Default:** Check the checkbox to have document details expanded in the Sessions Details page. [Default: *Checked*]
- 20 **Download Documents for Session Status (Days):** Number of days to keep physical, archived documents after they are indexed before they are purged. Database records are not modified. [Default: 365]

Archive Tab

Archive Tab (Non-Workflow)

After clicking Edit, the following fields are available for editing.

Save/Cancel on this screen have no effect on changes made to the Imaging System Advanced Settings screen.

- 1 **Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Edit:** Unlocks all visible fields for making changes.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click if you do not want to save any settings changes.
- Note:** Save and Cancel have no effect on changes made to the FI Settings for Synergy Imaging System screen.
- 2 **Encrypt Archive Documents:** This setting protects archived PDF documents by encrypting them. (Default: Checked)
 - 3 **Encrypt Password:** A password is required to change the status of Encrypt Archive Docs. **Contact IMM** for a password. [Only appears if the Encrypt Archive Docs setting is changed.]
 - 4 **Retain Archived History Docs (Days):** The number of days to keep archived documents history. (0-2555 days [7 years] – Default: 360 days).
 - 5 **Auto-fill indexes:** When checked, index field information missing from individual documents will automatically be populated on the user Documents Submitted screen from index field information extracted from other documents in the document set. When not checked, missing field information will not automatically be populated, but the user will still have the option of clicking the Fill Indexes link. Refer to the User Guide for more information.
 - 6 **Completed Sessions Search Filter:** Choose the documents a user will be able to view on the Search Archive screen. The FI Admin will default to seeing all documents for all users.
 - **Current user only:** Only documents for the currently logged on user will display on the Search Archived Documents screen. The User filter will not display.
 - **By user, default all:** Documents for all users will display on the Search Archived Documents screen. The User filter will display with all users as the default selection.

- **By user, default current:** Documents for all users will display on the Search Archived Documents screen. The User filter will display with the currently logged on user as the default selection.
- 7 Download Imaging Index Service:** This button may not display for your installation. Clicking this button installs the Imaging Index Service on the current machine and should be performed on the Imaging Index Service server machine for your FI. [Refer to Imaging Index Service – Admin Guide for more information.]

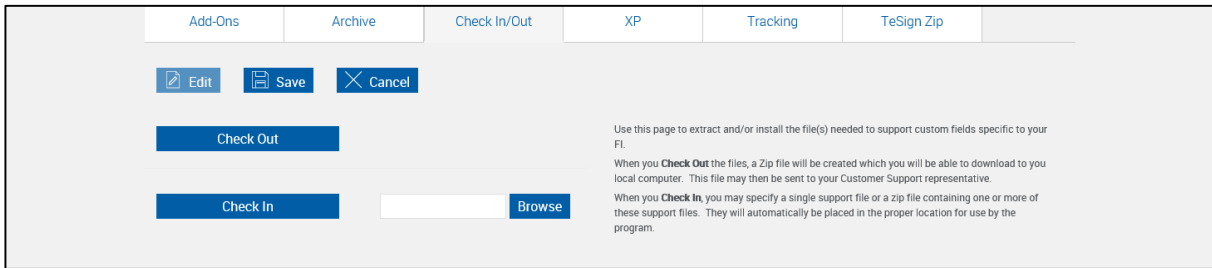
Archive Tab (Workflow)

After clicking Edit, the following fields are available for editing.

- 1 Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Edit:** Unlocks all visible fields for making changes.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click if you do not want to save any settings changes.

Note: Save and Cancel have no effect on changes made to the FI Settings for Synergy Imaging System screen.
- 2 Encrypt Archive Documents:** This setting protects archived PDF documents by encrypting them. (Default: Checked)
- 3 Encrypt Password:** A password is required to change the status of Encrypt Archive Docs. **Contact IMM** for a password. [Only appears if the Encrypt Archive Docs setting is changed.]
- 4 Retain Archived History Docs (Days):** The number of days to keep archived documents history. (0-2555 days [7 years] – Default: 360 days).
- 5 Auto-fill indexes:** When checked, index field information missing from individual documents will automatically be populated on the user Documents Submitted screen from index field information extracted from other documents in the document set. When not checked, missing field information will not automatically be populated, but the user will still have the option of clicking the Fill Indexes link. Refer to the User Guide for more information.

Check In/Out Tab



Use this page to extract and/or install the file(s) needed to support custom fields specific to your FI.

When you **Check Out** the files, a Zip file will be created which you will be able to download to your local computer. This file may then be sent to your Customer Support representative.

When you **Check In**, you may specify a single support file or a zip file containing one or more of these support files. They will automatically be placed in the proper location for use by the program.

The following fields are available for editing.

- **Check Out:** Allows the user to extract the parameter.xml (txt or csv) file or other files used by the FI, along with any associated data definition files. The files are downloaded to the user's machine. This file may then be sent to IMM support.
- **Check In:** Allows the user to install the parameter.xml (txt or csv) file or other files used by the FI, along with any associated data definition files. The files may be uploaded individually. The parameter.xml (txt or csv) file is stored in the FI's folder.

XP Tab

i This tab may not display for your installation.

After clicking Edit, the following fields are available for editing.

- 1 **Admin Base Page URL:** Allows the user to specify the page that an XP admin user will return to when they use the Back To XP link.
- 2 **XP Database:**
 - 2a **User:** The user for the XP database.
 - 2b **Data Source:** The name of the XP database from the DB2 profile.
 - 2c **Password:** The password needed to connect to the XP database.
 - 2d **Confirm:** When changing the password, used to ensure the password is entered correctly.
 - 2e **XP Referrer IB:** Not Defined
- 3 **Edit Document Sets:** When this is checked, the admin user will be able to maintain document sets without being synced with XP. A warning message will display reminding the admin user to synchronize the document sets with XP before processing sessions. (Default: Unchecked)

Tracking Tab

i IMM advises not to modify these event choices. Please **Contact IMM** for assistance in changing these settings. Modifications affect searches in the legacy DB.

1 Action Buttons: These actions apply to the upper and lower parts of the page.

- **Edit:** Unlocks all visible fields for making changes.
- **Save:** Click to save changed settings.
- **Cancel:** Click to discard any changes to this screen.

After clicking Edit, the following fields are available for editing.

2 Retain Tracking (Days): The number of days tracking information will be retained in the database (default: 90 days).

3 Tracking Search Filter: Choose the events a user will be able to view in the Tracking Report. Only applies to users; the FI Admin will default to *By user, default all*.

- **Current user only:** Only checked events for the currently logged on user will display on the Tracking Report. The User filter will not display.
- **By user, default all:** Checked events for all users will display on the Tracking Report. The User filter will display with all users as the default selection.
- **By user, default current:** Checked events for all users will display on the Tracking Report. The User filter will display with the currently logged on user as the default selection.

4 Tracked Events: These (tracked) events are optionally recorded in the Tracking database. Only checked events will be tracked.

Print Preview	Save Session	Work Queue Transfers ¹
Process document(s)	Retrieve Session	Send for Secure Delivery ²
Archive document(s)	Delete Session	Submit for Secure Digital Signatures ²

¹ - Only appears if **Enable Work Queue Transfers** (page 133) is checked.

² - Only appears if the Remote Signatures add-on is activated.

TeSign Zip Tab (Only available if the TeSign Zip Files Add-On is activated.)

After clicking Edit, the following fields are available for editing.

- 1 **Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Edit:** Unlocks all visible fields for making changes.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click to discard any changes to this screen.

After clicking Edit, the following fields are available for editing.

- 2 **Zip Handler Assembly:** Preset to *IMM.TeSign.BL.ProSign.dll*
- 3 **Zip Handler Class:** Preset to *IMM.TeSign.BL.ProSign.ZipHandler*
- 4 **Zip Handler Password:** Each zip package is password protected. The password entered here must match the password for the zip package in order to extract PDF files for definition in AIM and for processing in Client.

All TotaleSign Admin Index Manager and Client machines associated with this Financial Institution must be restarted after the Zip Handler Password is entered and saved.

Imaging Systems

Refer to the Imaging Index Service Administrator Guide for detailed information about Imaging Systems.

eSignature Settings

Defaults Tab

Refer to the User Guide for a Detailed explanation of signing procedures.

Click **Administration > eSignature**.

The eSignature Settings Page appears unlocked with the Defaults tab selected.

The administrator can use the options on this page to set the signing methods and defaults and modify the FI eSignature Consent Text.

The consent will display when a member signs a document. The wording at this point is only a recommendation; it must be updated for your location before using eSignature for member signing.

Click **Edit** to unlock the page.

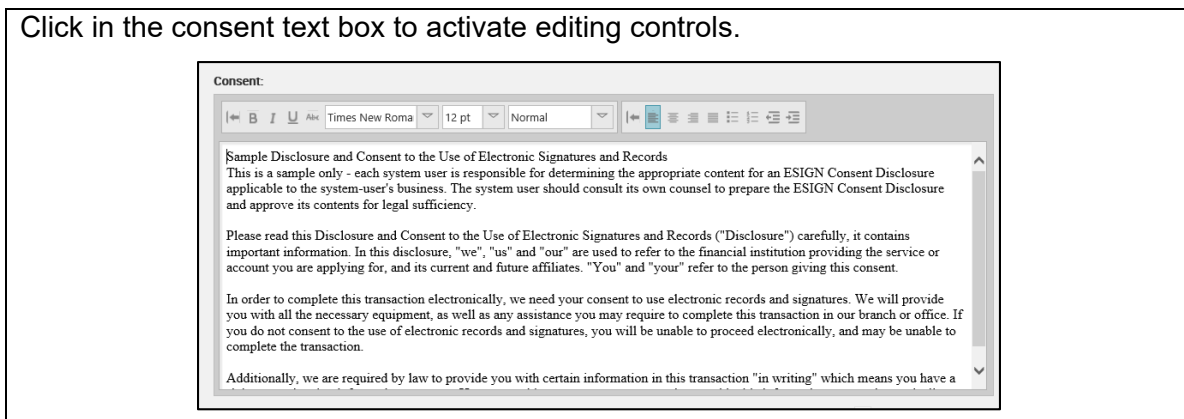
The screenshot displays the 'eSignature Settings' interface with the 'Defaults' tab selected. The page is divided into several sections:

- Defaults:** A table with three rows for different devices: PC-Touch Capable, PC-Traditional, and iPad. Each row has checkboxes for 'SignaturePad', 'Type', and 'Draw', and a 'Default to:' dropdown menu.
- eSignature Management:** A section with a dropdown menu for 'Allow to Change View/Skip Property' set to 'None'.
- Consent:** A large text area containing a sample disclosure and consent text for electronic signatures and records.
- Buttons:** At the bottom, there are buttons for 'View and Print', 'Save', and 'Cancel', along with a checkbox for 'Allow to Add Photo'.

Red circles 1 through 6 highlight the following elements:

1. The 'Defaults' tab.
2. The 'Defaults' table.
3. The 'eSignature Management' dropdown.
4. The 'Consent' text area.
5. The 'Allow to Add Photo' checkbox.
6. The 'View and Print', 'Save', and 'Cancel' buttons.

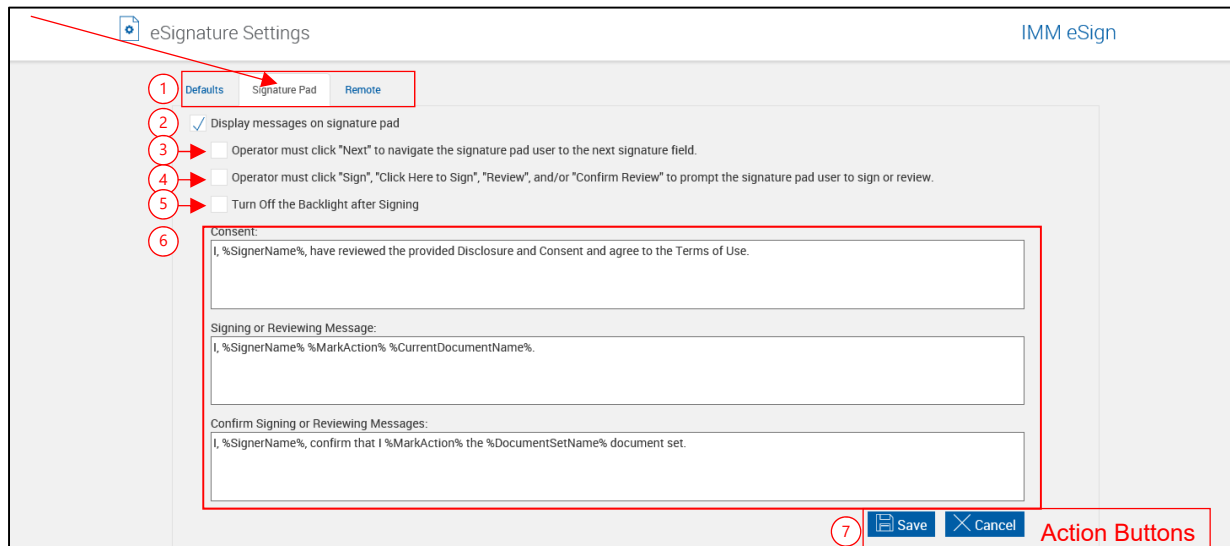
- 1 **eSignature Settings Tabs:** Defaults, Signature Pad, Remote.
- 2 **Defaults:** Set signing devices and methods.
 - Devices
 - PC-Touch-Capable (computer)
 - PC-Traditional (desktop, laptop)
 - iPad
 - Signing Methods
 - Signature Pad
 - Type (sign via typed name signature)
 - Draw (used for Touch-Capable devices)
- 3 **Allow to Change View/Skip Property:** This dropdown selects the user level *allowed* to change the View/Skip Property when processing sessions on the eSignature Management page.
 - **None:** No users will be allowed to change the View/Skip Property.
 - **Administrators:** Only administrators will be allowed to change the View/Skip Property.
 - **DocumentAdmins:** Only Document Administrators will be allowed to change the View/Skip Property.
 - **Users:** All users will be allowed to change the View/Skip Property.
- 4 **Consent:** The consent is displayed when a member signs a document. *The wording at this point is only a recommendation; it must be updated for your location before using eSignature for member signing.* The administrator can use these options to set the signing methods and defaults and modify the FI eSignature Consent Text. **Note:** The fonts selected may be substituted in your operating system.



- 5 **Allow to Add Photo:** When checked, the Add Photo button appears on the eSignature Consent page.
- 6 **Action Buttons:**
 - **Cancel:** Click to discard any changes to this screen.
 - **Edit:** Unlocks all visible fields for making changes.
 - **Save:** Click to save changed settings.

Signature Pad Tab

On the eSignature Settings page, click the Signature Pad tab.



Remote Tab Settings List

- 1 eSignature Settings Tabs:** Defaults, Signature Pad, Remote.
- 2 Display messages on the signature pad:** When this setting is selected, messages appear on signature pads during the in-person signing process. This method gives signers more control using their signature pads, which results in a faster signing process. Using the signature pad, signers create signatures and initials, accept terms, apply their mark throughout the document set, and confirm completion of the signing process with minimal intervention from the financial institution representative. Refer to [Sample Signature Pad Displays](#) on page 145 and the “In-Person Signing” section in the User Guide for details.

When this setting is not selected, messages do not appear on signature pads during the in-person signing process. Instead, the signature pads are blank and are only used to create signatures and initials. Refer to the “Signature Pad without Messages” section of the User Guide for details.
- 3 Operator must click “Next” to navigate the signature pad user to the next signature field:** When this setting is selected, the operator must click “Next” on the operator’s display to move the signature pad user to the next item. When not selected, the operator will automatically be routed through signing documents.
- 4 Operator must click “Sign”, “Click Here to Sign”, “Review”, and/or “Confirm Review” to prompt the signature pad user to sign or review:** When this setting is selected, the operator must click prompts to move the signature pad user to the next item. When not selected, the operator will automatically be routed through signing documents.
- 5 Turn off the backlight after signing:** When this setting is selected, the backlight will turn off after the signature pad user has completed the signing experience.

6 Consents: These are signature pad messages that display for the signer. The following monikers may be used for substitutions:

- Consent: %SignerName%
- Signing Message: %SignerName%, %MarkAction%, %CurrentDocumentName%, %MarkType%
- Confirm Signatures: %SignerName%
- Longname = %CurrentDocumentName%
- Shortname = %DocumentSetName%



A Moniker (%SignerName%) is a pre-defined name used to hold a place for data. For example, %SignerName% will be replaced in the signature pad with the name of the signer, as pulled from processed documents.

7 Action Buttons: These actions apply to the upper and lower parts of the page.

- **Save:** Click to save changed settings.
- **Cancel:** Click to discard any changes to this screen.

Sample Signature Pad Displays

The following example messages appear on the signature pad if the Signature Pad Administration setting **Display Messages on Signature Pads** is selected. The messages can be modified in the **Consent**, **Signing Message**, and **Confirm Signatures** message fields.

Consent:

I have reviewed the provided Disclosure and Consent and agree to the Terms of Use.

Decline Accept

Sign Message:

I hereby sign APPSUM1APPC.

Cancel Sign

- Actions available are “sign” and “initial”.

Confirm Signatures:

I confirm that I have applied my signatures and have completed the signing process

Cancel Confirm Signatures

Remote Tab (Only available if the Remote Signatures Add-On is activated.)

Remote Signatures is an add-on to eAtlas that gives you the ability to complete the application process remotely, using a secure document delivery system with digital certificate capabilities.

On the eSignature Settings page,

Click the **Remote** tab.

Remote Signatures Screen

The Remote Signatures Settings page appears.



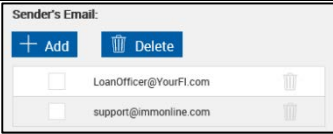
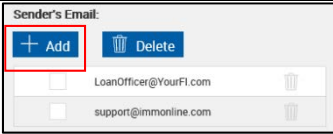
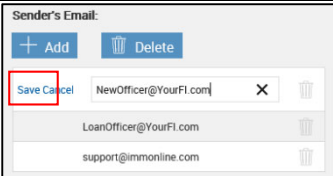
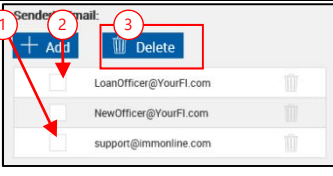
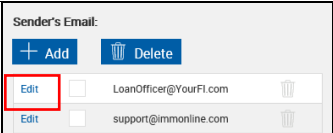
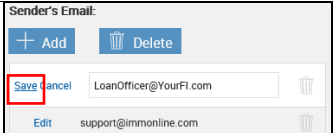
When completing the fields on this page, do not copy and paste from Word; embedded control characters may cause erratic behavior. Use Notepad or type directly into the field.

Remote Tab Settings List

- 1 eSignature Settings Tabs:** Defaults, Signature Pad, Remote.
- 2 Default Product Type Name:** If the document set being processed originates from your host, the document set name provided by your host will be sent to the document delivery system. The Default Product Type Name is used when no set name is provided by your host and documents are submitted to Remote Signature. (50 characters maximum) [Refer to [Customizing View/Sign Notifications](#) on page 149 for more information.]
- 3 Secure Delivery Message:** The message sent from the document delivery system to all parties when sending documents for *secure delivery*. (3,000 characters maximum) Refer to [Customizing View/Sign Notifications](#) on page 149 for more information.]

- 4 **Remote Signing Message:** The message sent from the document delivery system to all parties when sending documents for *digital signatures*. (3,000 characters maximum) [Refer to [Customizing View/Sign Notifications](#) on page 149 for more information.]
- 5 **Alternate Signature Pattern:** Not used in this installation.
- 6 **LightsOut Default Email:** Not used in this installation.
- 7 **LightsOut Default Service:** Not used in this installation.
- 8 **Sender's Emails:** This is the list of available email addresses used when submitting documents to a document delivery system. Refer to [Sender's Emails](#) on page 148 for more information.
- 9 **Action Buttons:** These actions apply to the upper and lower parts of the page.
 - **Save:** Click to save changed settings.
 - **Cancel:** Click to discard any changes to this screen.

Sender's Emails

<p>1</p>  <p>This is the list of available email addresses used when sending documents to a document delivery system. (These email addresses must be activated with the Remote Signature delivery system and authenticated by each user.)</p>	<p>2</p>  <p>This list can be modified as necessary.</p> <p>To add a new sender email, Click Add New.</p>
<p>3</p>  <p>Enter the new sender email.</p> <p>Click Save.</p> <p>The email is added to the list.</p>	<p>4</p>  <p>To remove a sender email,</p> <ol style="list-style-type: none">1 Check the box to the left of the email address to be deleted.2 Check the box at the top of the column to select all.3 Click Delete. <p>A warning box appears.</p> <p>Click OK to delete.</p> <p>The email is removed from the list.</p>
<p>5</p>  <p>To edit an email,</p> <p>Click Edit next to the email.</p>	<p>6</p>  <p>Make any changes.</p> <p>Click Save.</p> <p>The lists refreshes showing the change.</p>

Customizing View/Sign Notifications

After documents are submitted to be viewed or signed, the document delivery system will contact all parties in the set via email.

You can modify areas of the email sent to inform parties.

Note: This is a plain-text version. Your email system may send mail in a different format.

```

From: Loan Officer [mailto:LoanOfficer@YourFI.com]
Sent: Friday, March 23, 2012 9:00 AM
To: John Smith

Subject: Please E-sign the Document Set (for John Smith)

Loan Officer Has Sent You Document Set (for John Smith) to e-Sign

Loan Officer (Your FI) says:
Your documents are available for viewing, signing and printing.

Click here to review and e-sign Document Set (for John Smith).

With just one simple step, you can electronically sign this document. After you e-sign the Document Set (for John Smith), the agreement will be forwarded to jane.smith@HomeEmail.com to e-sign. Then, all parties will be notified via email.

```

- 1 The email address is selectable (Refer to the User Guide, Remote Signatures) and is chosen from **Sender's Emails** on page 148.
- 2 "Document Set" is used when no document set name is provided in the host data file. Refer to **Default Product Type Name** on page 146 for more information.
- 3 This portion of the email is customizable. Refer to **Remote Signing Message** on page 147 for more information.

Remote Attachment Template

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

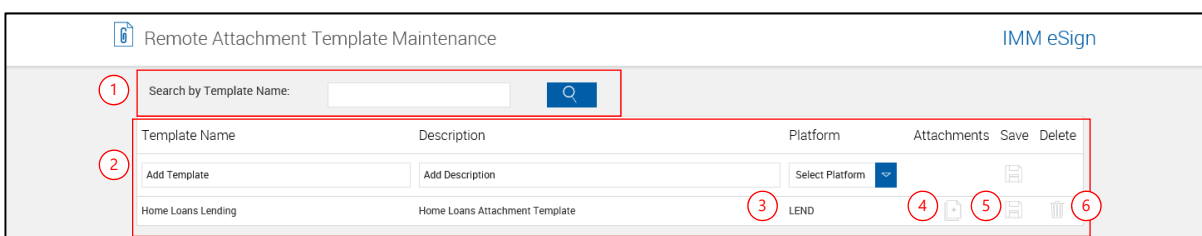


Remote Attachment definitions must previously be created in Admin Manager, [Attach Documents](#) (page 70), or [Define Attachment](#) (page 83).

The Remote Attachment Template can be applied to any or all individual document signers in a session on the eSignature Management page. Refer to the User Guide for a detailed explanation of using the eSignature Management page.

These attachments will be electronically supplied by the applicant during the signing experience on the Adobe EchoSign website.

Click **Administration > Remote Attachment Template**.



- 1 Search by Template Name:** When editing templates, this allows quick location of existing templates by filtering the name. The search will automatically start after typing 2 letters.
- 2 Template list**
- 3 Platform:** Select a platform, previously referred to as a dictionary.
- 4 Attachments Icon:** Click to expand and edit attachments.
- 5 Save Icon:** Click to save changes to the template.
- 6 Delete Icon:** Click to delete the associated template.

Template Attachment Details

After clicking the Attachments icon,
The Requested Attachments details appear.

Requested Attachments Details

Attachment Name	Description	Required	Save	Delete
PhotoIDLending	Attachment - Photo ID (Lending)	<input checked="" type="checkbox"/>		
UtilityBillLending	Attachment - Utility Bill (Lending)	<input type="checkbox"/>		
DriversLicenseLending	Attachment - Scanned Driver's License (Lending)	<input type="checkbox"/>		
PayStubLending	Attachment - Paystub (Lending)	<input checked="" type="checkbox"/>		
Select Attachment		<input type="checkbox"/>		

- 1 **Attachment Name/Description:** The Attachment Name and Description are defined in Admin Manager, [Attach Documents](#) (page 70), or Define Attachment (page 83) and cannot be edited on this screen.
- 2 **Required:** When checked the associated attachment will be required before the session can be sent for signatures.
- 3 **Save Icon:** Click to save changes to the attachment.
- 4 **Delete Icon:** Click to delete the associated attachment.
- 5 **Select Attachment:** Click to add an attachment to the template.

Add Template

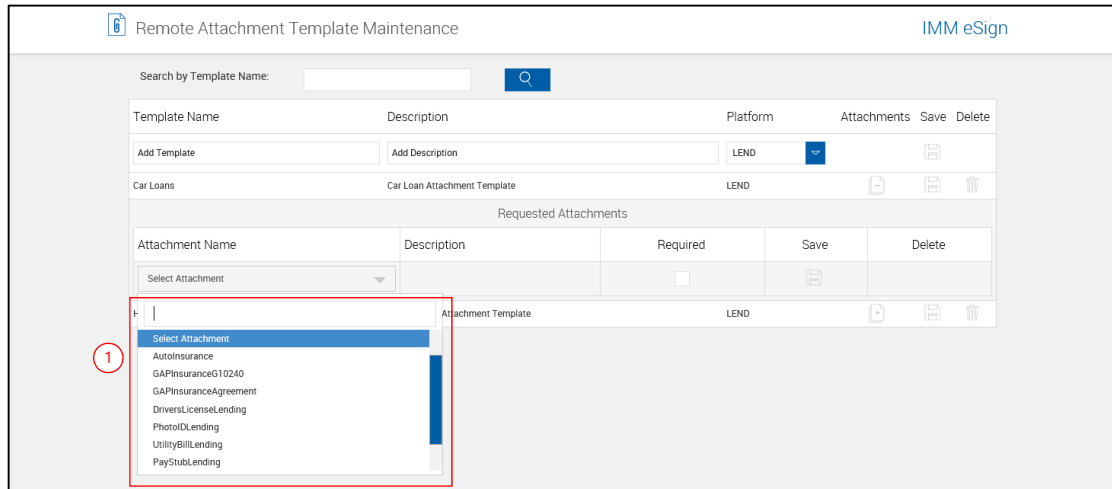
- 1 Click in the Template Name - Add Template text box to start.

- 1 **Template Name – Add Template:** Enter a new template name.
- 2 **Description:** Enter a template description.
- 3 **Platform:** Select a platform, previously referred to as a dictionary.
- 4 **Save:** Click the Save icon.

The page refreshes.

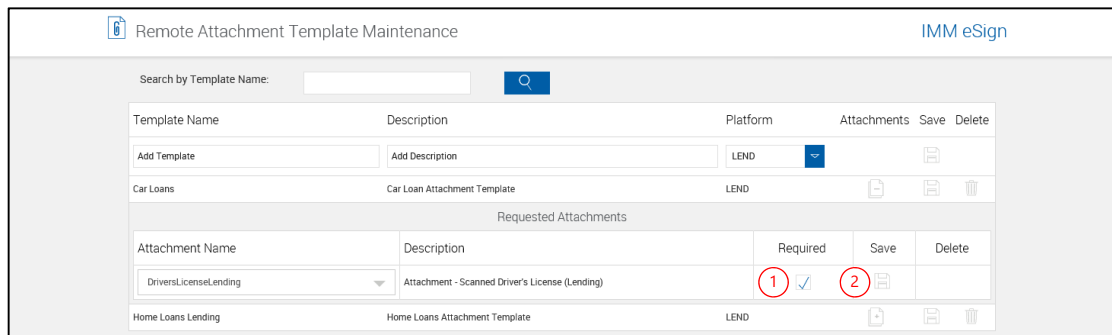
Add Attachment

- 1 The page refreshes.



- 1 **Select Attachment:** Click to select an attachment.

- 2



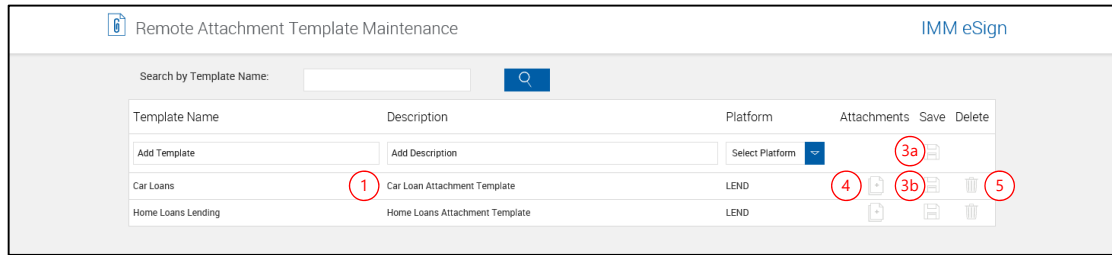
- 1 **Required:** When checked the associated attachment will be required before the session can be sent for signatures.
- 2 **Save Icon:** Click to save changes to the attachment.

After clicking the Save Icon, the screen refreshes showing the added attachment and a new *Select Attachment* line.

- 3 Repeat as necessary for additional attachments.

Edit Template

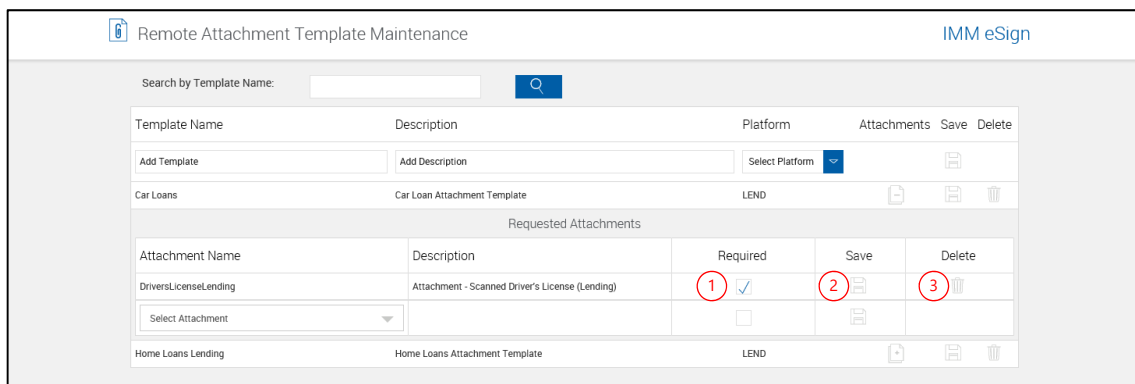
- 1 From the Remote Attachment Template Maintenance page,



- 1 Click in the **Template Name** or **Description**,
- 2 Make changes as necessary.
- 3a **Save**: Click to save changes to a new template.
- 3b **Save**: Click to save changes to an existing template.
- 4 **Attachments**: Click to expand and edit the attachments.
- 5 **Delete**: Click to delete the associated template.
 - A confirmation popup appears. Click OK to delete the template.

Edit Attachment

- 1 After expanding the attachments.



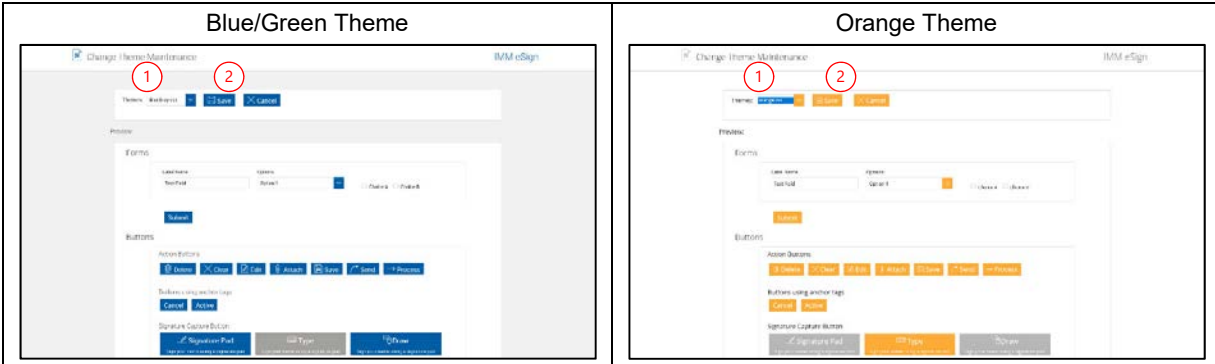
- 1 Only the Required checkbox can be edited.
- 2 **Save**: Click to save changes to the attachment.
- 3 **Delete**: Click to delete the associated attachment.

Change Theme



The display of this *setting* is controlled by the IMMAdmin.

Click **Administration > Change Theme**.



The text, buttons, dropdowns, all items are samples showing how they will change for different themes. These items are non-functional.

- 1 Select a theme.
- 2 Click **Save**.

Status API Settings

About Page – Status API Settings

Click **Administration > Status API Settings**.

The Help button provides a quick listing of icons and functions available and related to the Status API Settings page.

Click the Page Help button.

The screenshot shows the 'Status API Settings' page in the IMM eSign application. A red circle highlights a help icon in the top right corner of the page header. A red arrow points from this icon to a modal window titled 'About Page | Status API Settings'. The modal contains the following information:

About Page | Status API Settings

This is an administrative page that allows to create and/or edit Partner specific session status change notification settings.

Icons

- Delete** Delete notification setting.
- Keyboard** Use keyboard to type the value.
- Mouse** Use mouse click to select the value.

Controls

- On** Notifications ON/OFF toggle switch.

Time Out

0.5 min | 1 min | 1.5 min | 2 min | 2.5 min | 3 min

Time in minutes for each attempt to time out.

Attempts

1 | 2 | 3 | 4 | 5 | 6

Number of attempts to send notification.

URL

www.immonline.com

URL address to send notifications to.

Time Out in seconds

30

Time in seconds for each attempt to time out.

Status API Notifications



This item may not be functional for your installation.

This section displays all Partners. Only the Partner for your installation is required.

This page is used to set API Push settings.

The screenshot shows the 'Status API Settings' page. At the top, it says 'Total Records : 3' and 'Selected : 0'. There are buttons for 'Add', 'Delete', 'Select All', and 'Sort By'. Below this, there are three partner entries. The first entry, 'TeSign', has a checkbox checked, a URL of 'http://YourFI.com/SessionStatusPush/API/ReceiveSessionStatusNotification', an 'Attempts' dropdown set to 2, and a 'Time Out' dropdown set to 0.5 min. The second entry, 'TeSign2', also has a checkbox checked, the same URL, an 'Attempts' dropdown set to 2, and a 'Time Out in seconds' input field set to 75. The third entry, 'TeSign3', has a checkbox unchecked and a 'Notifications Off' button. At the bottom right, there are 'Save' and 'Cancel' buttons.

Status API Settings List

- 1 Total Records/Selected:** Self-explanatory.
- 2 Add:** Click to add new partner. (Only appears if there are additional partners to be added.)
- 3 Delete:** Click to delete selected partners.
- 4 Select All:** Select all partners for deletion.
- 5 Sort By:** Partner name – Ascending or Descending (Only appears if there are multiple partners used.)
- 6 Checkbox:** Click to select for deletion.
- 7 Partner Name:** Self-explanatory.
- 8 Delete:** Click to delete partner record.
- 9 Notifications Control:** Click to turn notifications on/off. Notification settings expand when on.
- 10 URL:** The location that will receive download status information.
- 11 Attempts Control:** Click to select the number of attempts to send push information.
- 12 Time Out Control:** Click to set the time-out time with preset increments.
- 13 Time Input Method:** Switch between pre-selected or keyboard entry for Time Out Control.

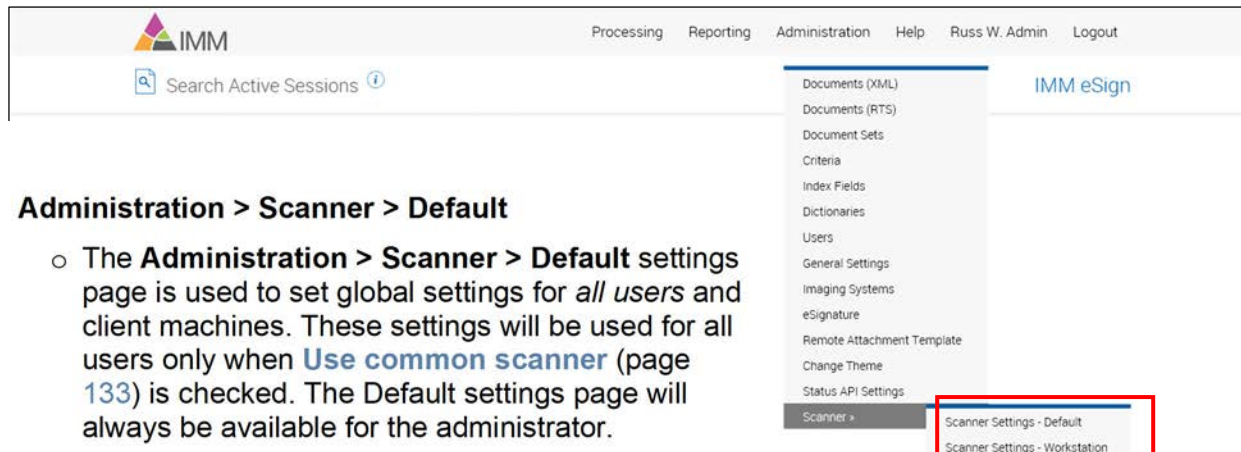
14 Action Buttons:

- **Save:** Click to save changed settings.
- **Cancel:** Click to discard any changes to this screen.

Scanner Settings

There are two scanner settings available to the Administrator:

We will discuss the Default setting. The setup procedure is the same for both Default and Workstation scanners.



Administration > Scanner > Default

- The **Administration > Scanner > Default** settings page is used to set global settings for *all users* and client machines. These settings will be used for all users only when **Use common scanner** (page 133) is checked. The Default settings page will always be available for the administrator.

Administration > Scanner > Workstation

- The **Administration > Scanner > Workstation** settings page is used to change scanner settings for the *currently logged on user* (in this case, you, the administrator) on the currently active machine.
 - If **Use common scanner** (page 133) is not checked, this menu item *will display*.
 - If **Use common scanner** (page 133) is checked, this menu item *will not display*.



This option only appears when **Use common scanner** (page 133) is checked.

If this is the first time you have accessed Attach Documents after installing TeA, you may be prompted to install additional software.

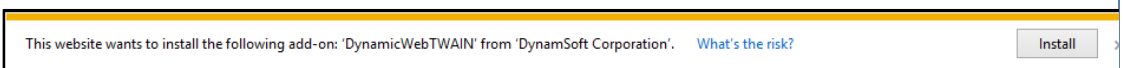
- The Scanner Settings page, *under Administrative Screens*, is used to set global settings for all users and client machines.
- The Scanner Settings page, *accessed from the Attach Documents popup*, Scanner Settings button, is used to change scanner settings for the currently logged on user on the currently active machine.

Images viewed on the setting page will not be saved.

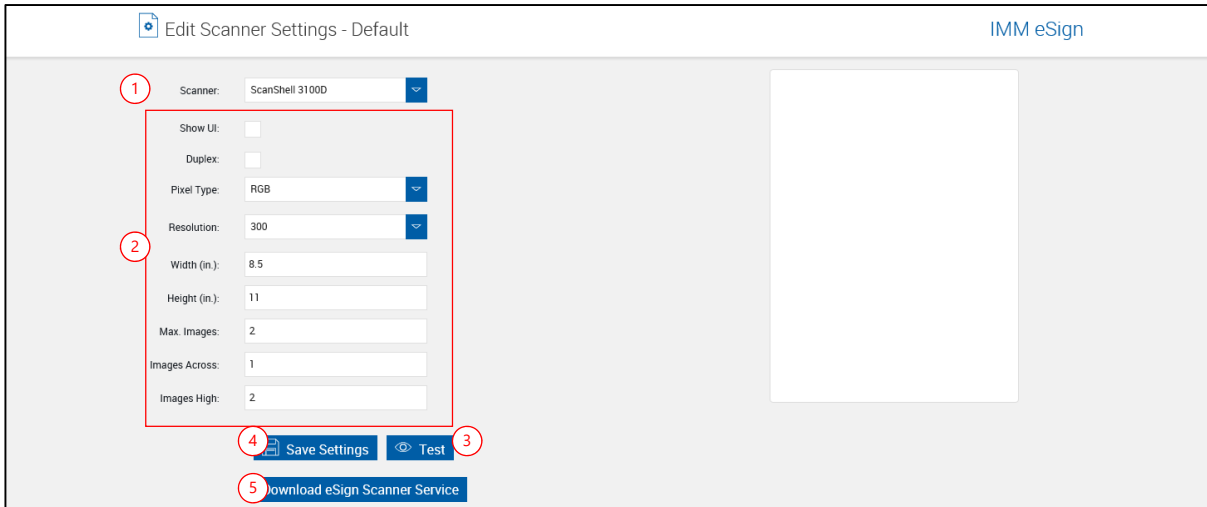
Click **Administration > Scanner > Default**.




If this popup appears




Click **Install**.



- 1 Select a scanner from the scanner pull-down menu.
- 2 Change settings as necessary.

 When scanning documents, high definition and large area scans will result in large file sizes.

- 3 Click **Test** to verify the settings.
- 4 Click **Save Settings**.
- 5 Click to download and install the eSign Scanner Service.

 Errors may occur if the eSign Scanner Service is not installed by a user with administrator privileges. IMM highly recommends the eSign Scanner Service is saved and then installed as an Administrator.

Scanner Service Installation

After downloading and saving the eSign Scanner Service installation file:

- 1  eSign Scanner Service components should not be installed from a UNC path.

Browse to and open the folder containing **IMM_eScannerService.exe**.

Right-click on **IMM_eScannerService.exe**.

Select **Run as Administrator**.

- 2 On some systems the User Account Control screen appears.
Click **Yes** to continue.
On some operating systems, the Open File - Security Warning window appears.
Click **Run**.

- 3 Repeat as necessary for additional attachments.

Email Settings



Please **Contact IMM** for assistance with these settings.

These settings are used for sending email notifications from Workflow.

From the Administrative Screens drop-down menu, click **Administration > Email Settings**.

The Email Management screen is displayed.

Click **Edit**.

The Email Management screen unlocks for editing.

The screenshot shows the 'Email Management' interface. At the top, there is a 'TeAWorkflow Email' section with a 'From:' field containing 'YourFinancialInstitutionContact@YourHost.com', marked with a green circle '4'. Below this is the 'SMTP Settings Section' with three fields: 'Host Email Server' (YourEmail.YourHost.com), 'Host User Name' (YourHostOriginator@YourHost.com), and 'Host Password' (masked with dots), each marked with a blue circle '1', '2', and '3' respectively. At the bottom, there are three buttons: 'Edit' (marked with a red circle '5'), 'Save', and 'Cancel'.

- SMTP Settings Section

- 1 **Host Email Server:** Enter the fully qualified domain name or IP address of your email server.
- 2 **Host User Name:** Enter the host user email address.
- 3 **Host Password:** Enter the password to the email account.

- TeAWorkflow Email

- 4 **From:** The email address used for sending FYI and Task emails in Workflow.

Click **Save** to save any changes.

- 5 **Action Buttons:**

- **Edit:** Unlocks all editable fields for making changes.
- **Save:** Click to save changed settings.
- **Cancel:** Click if you do not want to save any changes.

Help Menu

The following sub-menu choices are available:

[Diagnostics](#)

[Documentation](#)

[About](#)

Diagnostics

This option allows the user to validate that the system is working properly. It checks to make sure that the system is able perform all of the tasks required for that particular user and that the proper permissions have been set.

Click **Help > Diagnostics**.

Diagnostics (Non-Workflow)

DiagnosticsSynergy eSign™

Integrated Media Management RN JHA1

Directory Permissions

Directory	Can Write	Can Delete	Message
FIZ\Archive	True	True	
FIZ\ArchiveOther	True	True	
FIZ>Error	True	True	
FIZ\FDs	True	True	
FIZ\Temp	True	True	
FIZ\SourcePDFs	True	True	
Utilities	True	True	
Temp	True	True	
Windows Temp Directory - C:\Windows\Temp	True	True	


Other Items

Item Name	Message
WScript.Shell	Object created - True
FDFAApp	Object created - True
Institution Name	Integrated Media Management RN JHA1
Institution ID	2
TEAASP User	ERROR - Anonymous user not set for TEAASP virtual directory in IIS.
TEAASPFiles User	ERROR - Anonymous user not set for TEAASPFiles virtual directory in IIS.



The Error message shown above does not indicate a problem. It will display if the user who is viewing this screen is not the user who performed the application installation.

Diagnostics (Workflow)

 Diagnostics
IMM eSign

Integrated Media Management WKfl

Directory Permissions

Directory	Can Write	Can Delete	Message
FIB\Archive	True	True	
FIB\ArchiveOther	True	True	
FIB\Error	True	True	
FIB\FDFs	True	True	
FIB\Temp	True	True	
FIB\SourcePDFs	True	True	
FIB\AddOns\FDFs			ERROR - Directory does not exist!
FIB\AddOns\SourcePDFs			ERROR - Directory does not exist!
Utilities	True	True	
Temp	True	True	
Windows Temp Directory - C:\Windows\Temp	True	True	

Other Items

Item Name	Message
WScript.Shell	Object created - True
Institution Name	Integrated Media Management WKfl
Institution ID	8
TEAASP User	IMMLAB\vusswadmin
TEAASPFiles User	IMMLAB\vusswadmin
Time Zone	Eastern Standard Time

Workflow - Active Dir

Active Dir Header	Value
User	IMMLAB\vusswadmin
User Full Name	Russ W. Administrator
Manager AD Info	CN=Stephen B. Manager,CN=Users,DC=immlab,DC=com
Manager Full Name	Stephen B. Manager
Manager Full Name Without Slash	Stephen B. Manager
Manager NT Name	stephenmanager
Authenticated	True
Groups/Sub Groups	IMMFCDocs, Administrators, Domain Admins, Denied RODC Password Replication Group, Administrators, Remote Desktop Users



The Error message shown above does not indicate a problem. It will display if the user who is viewing this screen is not the user who performed the application installation.

Documentation

The user may view the administrator documentation (this document) in a separate window by selecting this option.

Click **Help > Documentation**.

The document appears in a new tab.

When the *Administrator* is logged in and clicks **Help > Documentation**, the Administrator's Guide appears in PDF format.

When the *User* is logged in and clicks **Help > Documentation**, the User Guide appears in PDF format.

About

This option displays a popup that provides system information: the current versions of the base product, add-ons that have been installed, and the product serial number.

Click **Help > About**.

The About screen appears.

User Name

The following sub-menu choices are available:

User Account Settings

User Account Settings

Click **User Name > User Account Settings**.

The Users Maintenance screen appears.

The screenshot displays the 'Users Maintenance' interface. At the top left is a close button and the title 'Users Maintenance'. At the top right is the 'IMM eSign' logo. The main content area contains the following fields and controls:

- User ID: RussWAdmin
- Domain: IMMLAB
- Name: Russ W. Admin
- Active:
- Group: Administrators (dropdown menu)
- Default Sender Email: russwadmin@YourFI.com

Below these fields are four buttons: Edit, Save, Cancel, and Reset Password. Underneath is a 'Partner Alias' section with a search bar and two buttons: '+ Add New' and 'Delete Selected'. Below this section, it states 'No records available.'



The Partner Aliases area is not functional for your installation.

Edit User Name

Click **Edit**.

The screenshot shows the 'Users Maintenance' interface in IMM eSign. The form contains the following fields and values:

- User ID: RussWAdmin
- Domain: IMMLAB
- Name: Russ W. Admin (indicated by a red arrow and circled number 1)
- Active: (indicated by a red arrow and circled number 2)
- Group: Administrators (indicated by a red arrow and circled number 3)
- Default Sender Email: russwadmin@YourFI.com (indicated by a red arrow and circled number 4)

At the bottom of the form, there are four buttons: Edit, Save (highlighted with a red box and circled number 5), Cancel, and Reset Password.

The Users Maintenance screen refreshes.

- 1 Name:** Enter the user name (100 characters maximum).
- 2 Active:** Enable to make the user active. When checked, the user can log onto the TotaleAtlas system. When not checked, the user cannot logon.
- 3 Group:** Administrators, DocumentAdmins or Users. Users added through this screen who will be processing documents through TeSign should be assigned to the TeSign group. Refer to [Groups and Privileges](#) (page 7) for more information.
- 4 Default Sender Email:** This will be the default email address for the user as used on the eSignature Management page when sending documents for remote signature.
- 5 Click Save.**

Reset Password

Click **Reset Password**.

The screenshot shows a web interface titled "Users Maintenance" with the "IMM eSign" logo in the top right. The form contains the following fields and controls:

- User ID: RussWAdmin
- Domain: IMMLAB
- Name: Russ W. Admin
- Active:
- Group: Administrators (dropdown menu)
- Default Sender Email: russwadmin@YourFI.com
- Original Password: [text input]
- Password: [text input]
- Confirm Password: [text input]

At the bottom of the form are four buttons: Edit, Save, Cancel, and Reset Password.

Complete the following:



The password must be at least 8 characters long and must contain one lower-case letter, one upper-case letter and one numeric or special character.

- **Original Password:** Enter the password currently being used to connect to TotaleAtlas RTS.
- **Password:** Enter the new password.
- **Confirm Password:** Reenter the new password.
- **Action Buttons:** Click **Save**. Click **Cancel** to prevent saving the new password.

The changed password is saved.


Logout

Available To: All Users

Description: Closes the application for the user.

Click **Logout** to end the session.

IMM eSign Icon

When you sign onto your workstation, you should see the IMM eSign icon  in the system tray.

The icon in the system tray is used as an indication of the state of the program:



This icon indicates that IMM eSign is running normally. IMM eSign is able to communicate with the IMM eSign server, and documents will be processed in the **normal** fashion.



When the icon's background is teal, it is an indication that the client is **unable to communicate** with the IMM eSign server. Documents may be locally processed (on the workstation). Contact your administrator when the icon appears in the teal color background.



When the icon's background is **red**, it is an indication that the server was **unable to process documents** and the session resulted in an exception that will be saved to the exceptions folder. The red background disappears if the next processed session is successful. Contact your administrator to process the exceptions.




When the icon's background is **yellow**, it is an indication that a session is being processed in an Internet Explorer window.

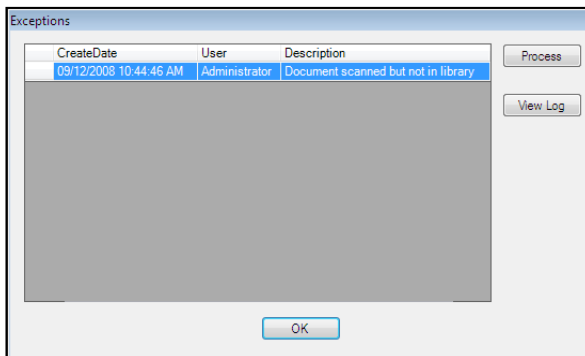
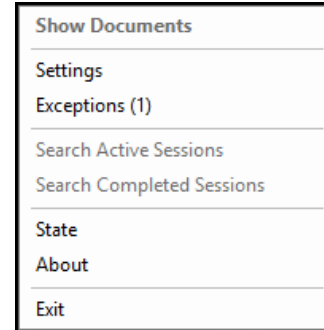
When you right-click on the IMM eSign icon () in the system tray, a popup menu appears.

IMM eSign Icon (Non-Workflow)

IMM eSign Icon Non-Workflow

When you right-click on the IMM eSign icon () in the system tray, a popup menu displays the following choices:


- **Show Documents:** Selecting this option will display the Documents List page. Refer to the Manual Output Folder in the User/Doc Admin Guide.
- **Settings:** This option is for Administrator use only. Refer to the **Client Installation Guide** for more information on these settings.
- **Exceptions:** This option will allow the user to select a session that has been previously saved locally as an exception session. The Exceptions window displays all the documents that resulted in an exception.
 - Click **Process** to reprocess the document.
 - Click **View Log** to view the error log for the document.
 - Click **OK** to close the Exceptions window.



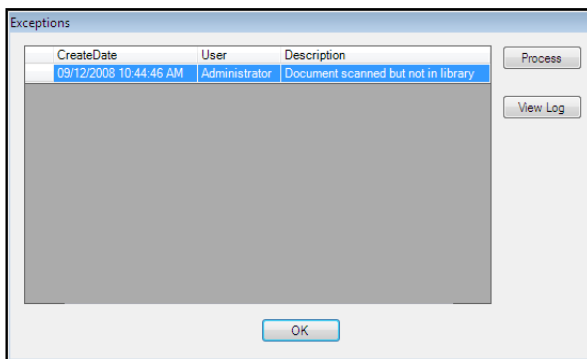
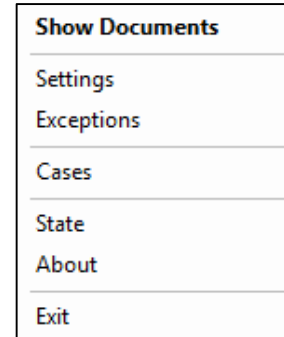
- **Search Active Sessions:** This option will allow the user to find sessions that have been previously saved on the server. When selected, the Search Active Sessions page opens. Refer to [Search Active Sessions \(XML/RTS\)](#) on page 25 for details.
- **Search Completed Sessions:** This option will allow the user to find documents that have previously been archived that are not moved to an imaging system. When selected, the Search Completed Sessions page opens. Refer to [Search Completed Sessions \(XML\RTS\)](#) on page 30 for details.
- **State:** When you hover over this option with your mouse, a message will display describing the current status of the application either online or offline. When IMM eSign is offline, contact your Network Administrator.
- **About:** This option displays the current version and copyright information.
- **Exit:** Click this option to exit the application.

IMM eSign Icon (Workflow)

IMM eSign Icon Non-Workflow

When you right-click on the IMM eSign icon () in the system tray, a popup menu displays the following choices:

- **Show Documents:** Selecting this option will display the Documents List page. Refer to the Manual Output Folder in the User/Doc Admin Guide.
- **Settings:** This option is for Administrator use only. Refer to the **Client Installation Guide** for more information on these settings.
- **Exceptions:** This option will allow the user to select a session that has been previously saved locally as an exception session. The Exceptions window displays all the documents that resulted in an exception.
 - Click **Process** to reprocess the document.
 - Click **View Log** to view the error log for the document.
 - Click **OK** to close the Exceptions window.



- **Cases:** This option will open the eSign *plus* Cases page which is used to find sessions that have been previously saved on the server.
- **State:** When you hover over this option with your mouse, a message will display describing the current status of the application either online or offline. When IMM eSign is offline, contact your Network Administrator.
- **About:** This option displays the current version and copyright information.
- **Exit:** Click this option to exit the application.

eSign Scanner Client Icon

The eSign Scanner client software is a component of IMM eSign. Like IMM eSign, the eSign Scanner icon is displayed in the system tray. The purpose of the eSign Scanner Client icon is to provide the state of the scanner.



When the icon is green, the eSign Scanner Client is running and items can be scanned.



When the icon is orange, items cannot be scanned.

Common Routines

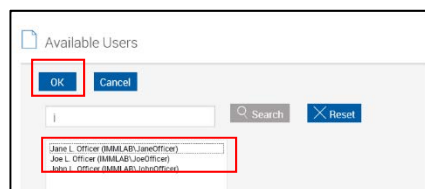
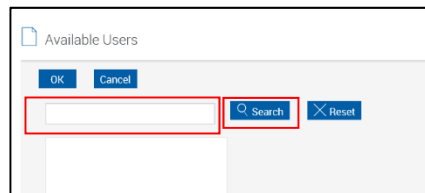
Using the Lookup Area

- **Lookup:** Click the Lookup button to display the Available Users popup.

In the

- **Lookup Link:** Click the Lookup link to open a popup for quickly locating users.

1. Enter one or more letters.
2. Click **Search**.
3. Click a **name** in the results box and click **OK**.
4. The name will be transferred to the lookup text box.



Search Hints

On some menus you may be able to search for user name, document name, account number, or other items.

You can use wildcard characters to find items that contain full or partial terms or match a character pattern.

- * The asterisk matches any number of characters.
- ? The question mark matches any single character.

Examples

- Jo* Matches names such as John, Joe, Joanna, Joaquin and Joseph.
- *on Matches names such as Peterson, Anderson, Paterson and Wilson.
- *n* Matches names such as Robinson, Hernandez, Jones and Martinez
- ?23 Matches 123, 223, 323, 423, etc.
- 1??4 Matches 1234, 1324, 1444, 1574, etc.
- 1?3* Matches 123, 1234454, 1739999, 1931, etc.


Add Additional Search Fields

Some screens may be modified to show additional search fields (index fields).

The screenshot shows the 'Search Completed Sessions' interface. In the 'Search Parameters' section, the 'Additional Search Fields' dropdown menu is open, showing 'Account Number' as the selected option. A red box highlights this dropdown, with a circled '1' next to it. To the right of the dropdown, a blue button with a plus sign and the text '+ Add Search Field' is highlighted with a red box and a circled '2'. Other search parameters like 'Select Dictionary', 'Start Date', 'End Date', and 'Customer Name' are also visible.

To add search fields,

- 1 Name:** Select the field from the Additional Search Fields dropdown.

 Additional Search Fields are defined by the Administrator.

- 2** Click Add Search Field.

The screen refreshes.

After the search is completed, the search field you selected will be added in the search parameter area and to the sessions display area.

The screenshot shows the 'Search Completed Sessions' interface after the search. The 'Account Number' search field is now part of the search parameters and is highlighted with a red box. The search results table below shows three records, with the 'Account Number' column highlighted in red.

Document Name	Date Created	Customer Name	Customer Number	Account Number	Date Started	Taxpayer ID Number	Indexed	Remote Signature	Created By
LOANADDENDUMSTATICD_1APP	9/6/2016 3:23:21 PM	John Smith	11223344	123456-1	03-23-2013	000-98-1234	True	False	Johnofficer
PROMNOTESTATB	9/6/2016 3:23:21 PM	John Smith	11223344	123456-1	07-01-2015	000-98-1234	True	False	Johnofficer
TERMSANDCONDITIONS_B	9/6/2016 3:23:21 PM	John Smith	11223344	123456-1	06-01-2015	000-98-1234	True	False	Johnofficer

Calendar Popup

From/To Date

- **From/To Date:** Click in a Calendar date box.
- The Calendar popup appears.

Use the right- and left-arrow buttons to select the month and year.

Click the day of the month to select.

The calendar closes automatically when the date is selected.

March 2019						
S	M	T	W	T	F	S
24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Date Range Selection

- **Date Range:** Click the text box.
- The Calendar popup appears.

Selected: 06/01/2018 - 07/05/2018 (35 Days) Close

JUNE 2018							JULY 2018						
SU	MO	TU	WE	TH	FR	SA	SU	MO	TU	WE	TH	FR	SA
27	28	29	30	31	1	2	1	2	3	4	5	6	7
3	4	5	6	7	8	9	8	9	10	11	12	13	14
10	11	12	13	14	15	16	15	16	17	18	19	20	21
17	18	19	20	21	22	23	22	23	24	25	26	27	28
24	25	26	27	28	29	30	29	30	31	1	2	3	4

Shortcuts Past [3Days](#) [7Days](#) [14Days](#) [21Days](#) [30Days](#) Previous [Week](#) [Month](#)

Use the < and > buttons to select the month and year.

Click on the day of the month to select.

The calendar closes automatically when the date is selected.

Date Formats Supported

The following Date Formats can be used for Sub Folder Name Format:

Month Format	Delimiters	Year Format
MM = 01, 02, etc.	No Space	yyyy = 2010
MMM = Jan, Feb, etc.	Space	
MMMM = January, February, etc.	"-" Hyphen	
	"_" Underscore	

Acceptable Combinations							
MMyyyy	MM yyyy	MM-yyyy	MM_yyyy	yyyyMM	yyyy MM	yyyy-MM	yyyy_MM
MMMyyyy	MMM yyyy	MMM-yyyy	MMM_yyyy				
MMMMyyyy	MMMM yyyy	MMMM-yyyy	MMMM_yyyy	yyyyMMMM	yyyy MMMM	yyyy-MMMM	yyyy_MMMM

Not Allowed: yyyyMMM, yyyy MMM, yyyy-MMM, yyyy_MMM

Contact IMM

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



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