IMM eSign
IMM eSign *plus*

2018.1

User/Document Administrator Guide

IMM *eSign*

Contents

Overview

STOP	Cloud integrations using an XML host do not require IMM eSign Client.

TotaleAtlas, TotaleAtlas RTS, TotaleAtlas XML, TeA, TeARTS, TotaleSign, and TeSign are generic terms for IMM eSign. TotaleAtlas Workflow is a generic term for IMM eSign *plus*. Except where noted, IMM eSign is a generic term for IMM eSign and IMM eSign *plus*. eAtlas is a generic term for eSign Lite. In this guide, text and screenshots may use any of these terms.

This guide provides an overview of the IMM eSign procedures available to Users and Document Administrators (DocAdmins). Images in this guide are from Windows 10 with Internet Explorer 11 except where noted. Your screens may differ with a different OS or browser.

i	The IMM eSign menu options, pages, and features displayed on the pages vary depending on your integration. All menu options, pages, and features in this guide may not be applicable to your installation. The screenshots in this guide are examples.

i	For the best viewing experience, ensure ClearType screen fonts are activated.

i	For additional help when logged in to IMM eSign, click the Page Help ⓘ button for more information about the page.

i	Options and buttons shown in this guide will vary if working on a session created in an older version of IMM eSign.

IMM eSign Static Documents vs. Dynamic Documents (RTS Only)

A static document is one that will always be the same length, and all information in a static document will always be in the same place. The Signature Field and Signature Date Field will always be in the same locations on the same page. The document will always have the same number of pages.

A dynamic document can vary in the number of pages included. A mortgage document may sometimes be one page long and nine pages or more in other cases. Typically, these documents require that an applicant read all of the information and then sign the document at the end, attesting that the applicant has read the required information. In a dynamic document the Signature Field and Signature Date field can always be at the end of the document regardless of the number of pages included.

Third-Party Attachments

IMM eSign can identify signature fields in third-party documents, such as Gap Agreements, and use those fields to collect signatures as part of a single, streamlined signing experience. This eliminates the need to use Document Designer to add signature fields.

Third parties designate fields differently. As such, IMM eSign identifies and understands the differences of each third-party document. IMM eSign determines the originating third party and then utilizes the appropriate method to extract and identify the signature locations, party

information, and all necessary fields to process the signature. If the signature method is identified, the document is attached to the session and processed. When there are optional signatures, the signature/initials fields must be reviewed in Document Designer before the session can be signed. The third party must be integrated to automate the identification and processing of these types of documents.

XML Documents

IMM eSign XML documents are created using LiquidOffice Forms Designer. IMM eSign only supports PDFs built with LiquidOffice Forms Designer. DO NOT use any other PDF designer tool to create or modify PDFs for IMM eSign. The LiquidOffice Forms Designer maps fields using the Field Data dictionary. Once fields are mapped, the PDF is uploaded to IMM eSign. IMM eSign merges the XML data generated by the business application with the uploaded PDF.

Getting Started

STOP	Windows Fast User Switching is not supported.

(i)	Using IMM eSign on a tablet may require the use of a tablet-specific stylus.

(i)	Do not use the Internet Explorer Back button while processing document sessions.

This guide assumes all IMM eSign components have been installed and set up. Contact your administrator for assistance, if necessary.

This section provides an overview of how to use IMM eSign.

Refer to **IMM eSign Menus** on page 137 for a detailed description of the IMM eSign menus and the tasks associated with each page.

Starting IMM eSign Client (RTS Only)

After IMM eSign Client has been successfully installed, it must be started to access Settings.

1   Click **Start** > **IMM** > **Client Application** to start IMM eSign Client.

2

(i)	This screen will not display if Suppress Logons was selected by your administrator during installation.

The Enter eSign Credentials window is displayed with the Host System FI ID populated from installation the first time any user starts IMM eSign Client.

- **Host System FIID**: Preset during installation.

- **Domain**: Preset during installation.

- **User ID**: ID of user logging into IMM eSign Client based on the Windows login.

(i)	The user ID must be created by the FI Admin prior to this step (if Auto Create User is not set to Create and Activate [HostAdmin]).

- **RTS Password**: IMM eSign password established when the FI is created.

After completing the RTS Password, click **OK** to continue.

3   **A**   If this warning is displayed, click **OK**.

	1. IMM eSign will not be functional until credentials are correctly set up.
	2. In some installations, this warning may display if the User ID has not been previously created by the FI Administrator.

Warning

⚠ Authentication failed

OK
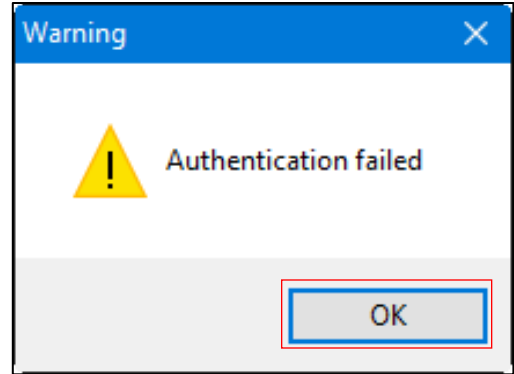
B   Right-click on the IMM eSign Client system tray icon 🖉. Refer to **IMM eSign Icon** on page **184** for details.

C   Click **Exit**.

D   Contact the FI Administrator.

Logging In (RTS Only)

Manually log in to IMM eSign using this procedure:

1   Right click the IMM eSign icon in the system tray, and then click **Search Active Sessions** or **Search Completed Sessions**.

2   IMM eSign opens in a web browser and displays either the Search Active Sessions page or Search Completed Sessions page depending on what you selected. Your User ID is displayed in the menu.

For more information about the IMM eSign icon, refer to **IMM eSign Icon** on page **184**.

Creating Documents (RTS Only)

In order to process a document or document session, documents must first be converted to PDF format. If the document you are processing is already in PDF format, proceed to **Loading Documents** on page **11**.

If your core system automatically creates PDF documents as you process loans or membership information, proceed to Previewing and Printing Documents.

To create a PDF document for processing, use the eSign Printer:

1. Open the document.

> This is an example of a Microsoft WordPad document that is being printed using the eSign Printer. Documents can be printed from <u>any application</u> that has the ability to print to a Windows printer.

2. Click **File > Print**.

3. Select **eSign Printer**.

4. Click **Print**. The document will be converted to PDF format and placed in the Output folder.

5. Repeat as necessary to create additional PDFs.
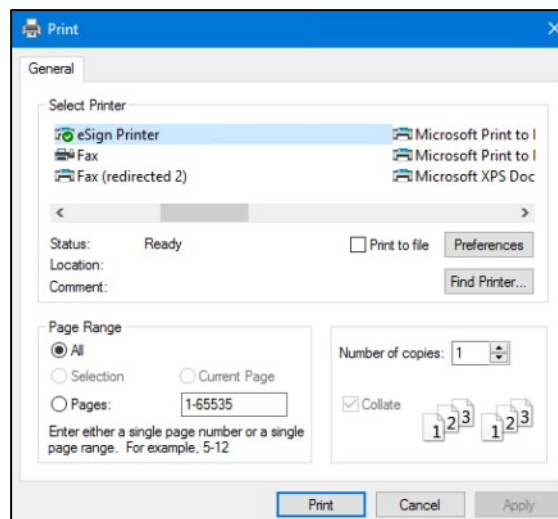
Loading Documents (RTS Only)

There are two locations to load a document: the Manual Output folder and the Output folder. Confirm documents are defined before loading them to the Manual Output folder or the Output folder. If documents are not defined, refer to **Processing Undefined Documents** on page **59** for details.

> **i** Documents should be no larger than 1.5 to 2.5 MB in size for the best eSign processing experience.

> **i** IMM eSign web browsers on IMM eSign Client machines must be closed before loading documents.

Manual Output Folder

PDFs placed in the Manual Output folder will not be loaded until the user directs IMM eSign to proceed.

Copy and paste the PDF document(s) into the Manual Output folder **(Program Files > IMM > TotaleSign > Client > ManualOutput)**.

When the icon's background is green (), it indicates that there are documents in the Manual Output folder waiting to be processed.

To process the PDFs placed in the Manual Output folder, right-click on the IMM eSign icon in the system tray, and then click **Show Documents**.
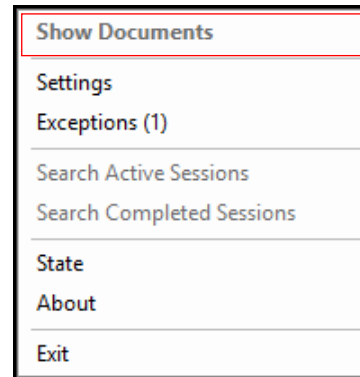
Reorder, delete, and preview documents in the **Documents List** window as necessary.

- **Preview** (): Select a document and click this button to display the selected PDF document in separate window. Only one document can be previewed at a time from the Documents List popup. Documents can be printed by clicking the Print icon. Close the window to continue.

- **Delete Documents:** Click this button to unlock the **Delete** () button. Select a document. Click the **Delete** button. When asked to confirm your action, click **Yes**. The document is deleted.

- **Reorder Documents**: Click this button to unlock the **Up/Down** (/) arrows. Select a document. Change that document's order in the list by clicking on the **Up** or **Down** arrow. Click **Reorder Documents** again to accept the order.

- **Close**: Click this button to close the **Documents List** window without saving changes.
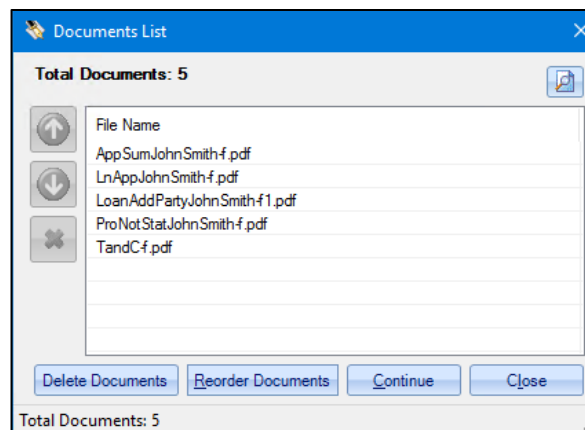
When you are ready to process the documents as a session, click **Continue**.

If there are multiple documents, a processing message will appear for each document being processed.
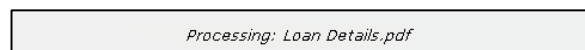
The status changes to *Closing document session* after all documents are processed and loaded. The Session Details page in IMM eSign opens. Refer to **Session Details** on page 152 for an overview of the Session Details page.
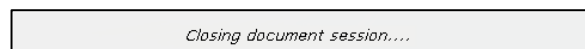
<table>
<tr><td>ⓘ</td><td>If there are problems processing the document, the Exceptions window is displayed.

1. Enter any descriptive text so this incident can be referred to later.

2. Click **OK**.

Refer to **IMM eSign Icon** on page **184** for more information.</td><td></td></tr>
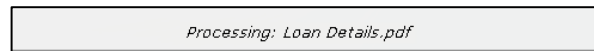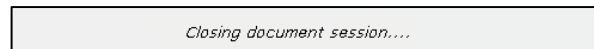</table>
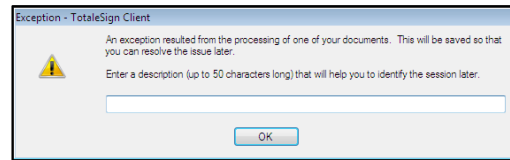
Output Folder

PDF documents placed in the Output folder will be automatically loaded to IMM eSign.

Copy and paste the PDF document(s) into the Output folder **(Program Files** > **IMM > TotaleSign** > **Client** > **Output)**.

If there are multiple documents, a processing message will appear for each document being processed.

Processing: Loan Details.pdf

The status changes to *Closing document session* after all documents are processed and loaded. The Session Details page in IMM eSign opens. Refer to **Session Details** on page 152 for an overview of the Session Details page.

Closing document session....

<table>
<tr><td>ⓘ</td><td>If there are problems processing the document, the Exceptions page will be displayed.

Enter any descriptive text so this incident can be referred to later.

Click **OK**.

Refer to **IMM eSign Icon** on page **184** for more information.</td><td></td></tr>
</table>
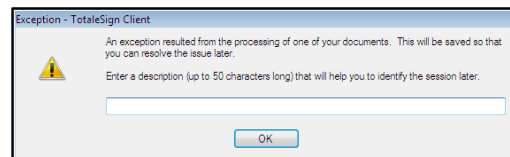
Creating a New Session (XML Only)

An XML session is created two ways:

- Data is passed from the core/host system. Refer to **Adding and Deleting Documents for a New Session**.

- In IMM eSign, click **Processing** > **Create New Session**. Refer to **Creating a New Session in IMM eSign.**

Adding and Deleting Documents for a New Session

When data is passed from the core/host system, the New Session page is automatically launched in IMM eSign. A document set is preselected in most cases.

1 If desired, add documents using the Add Documents area. Refer to **Adding Documents** on page **60** for more information about adding documents from the document library, attaching external documents, scanning items, and adding photographs to this session. For IMM eSign *plus* integrations, only the **Library** tab is available.

2   Review the Selected Documents area and make changes as necessary. Refer to **Create New Session (XML Only)** on page **138** for details about the icons and controls on this page.
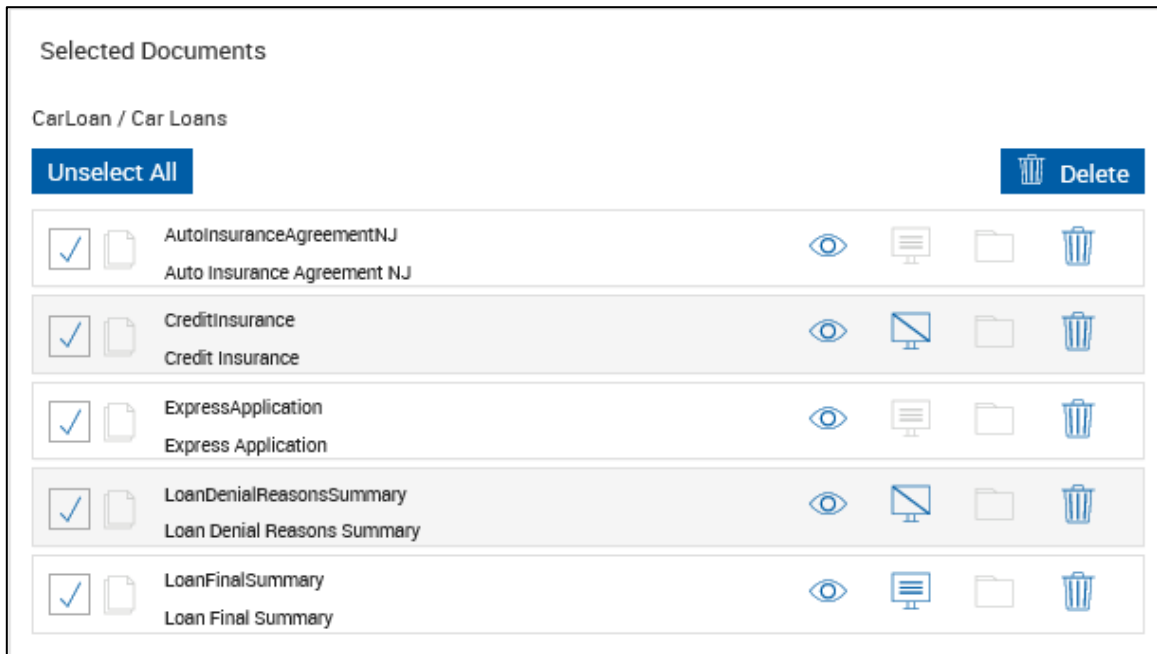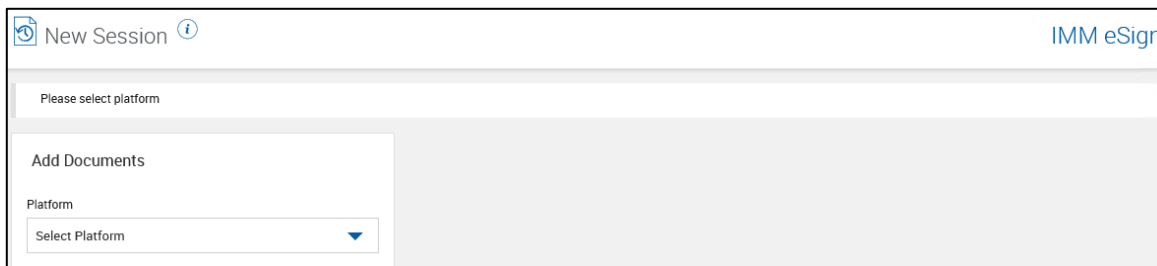
3   Once you are done making changes to the session, click **Process**. Refer to **Processing Documents** on page **57** for details.

Once the documents are processed, the Session Details page is displayed. Refer to **Session Details** on page **152** for details.

Creating a New Session in IMM eSign
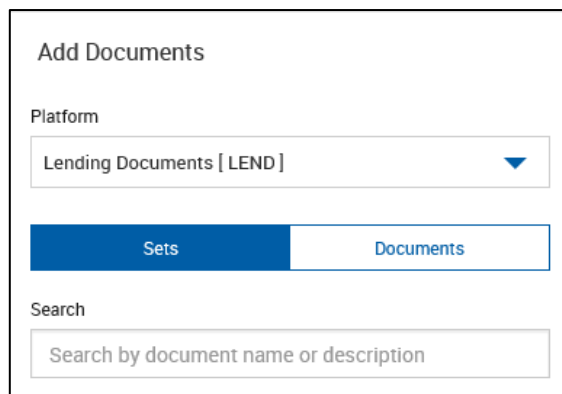
A new XML session can be created in IMM eSign by clicking **Processing** > **Create New Session**. From the New Session page, add documents and create a new session by following these steps:

1 If applicable, select a platform from the **Platform** dropdown.

2 Select **Documents** to choose from all of the documents, or select **Sets** to choose documents based on the document set.
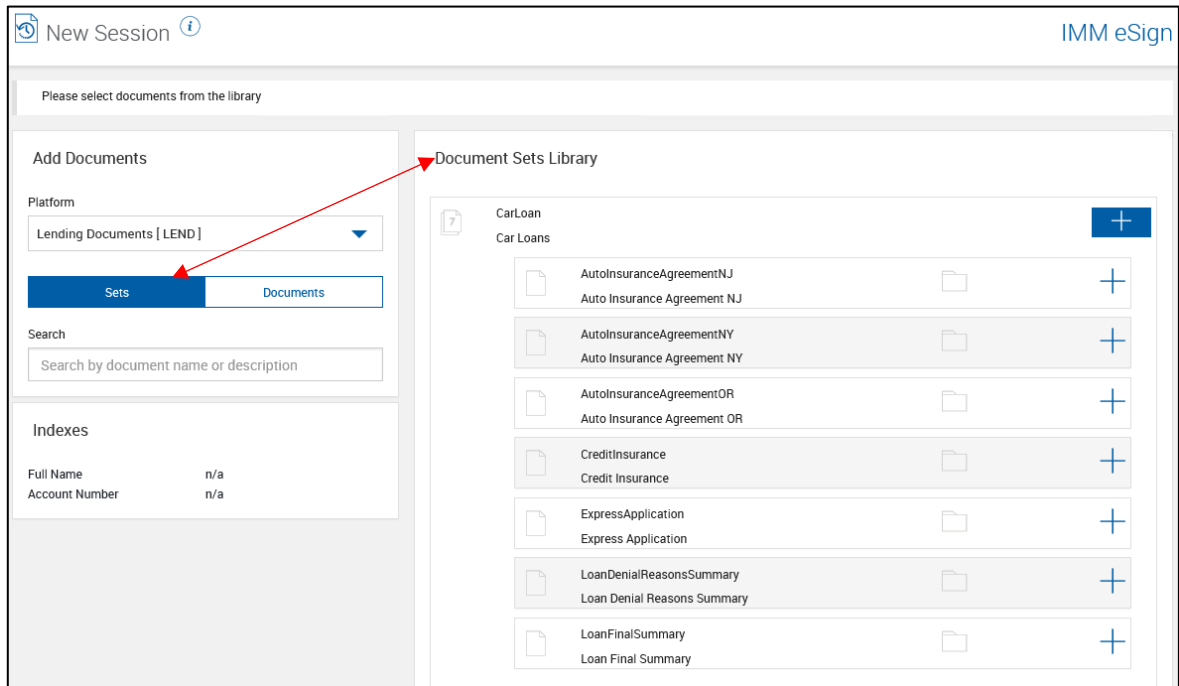
Use the **Search** field to search for documents or document sets by name and description. When **Documents** is selected, the search results only display documents. When **Sets** is selected, the search results display documents and document sets.

3   If you selected **Documents** in Step 2, the Documents Library is displayed. To select documents, click **Select Document** ╂ next to the desired documents. If **Select Document** ╂ is not available for a particular document, then that document is already included.
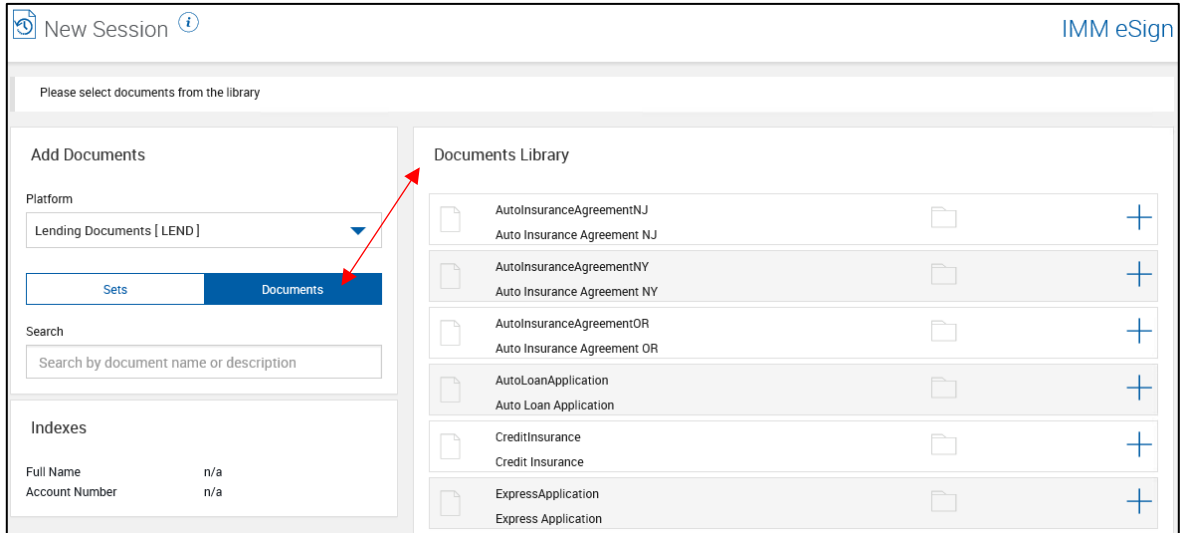
If you selected **Sets** in Step 2, the Document Sets Library is displayed. To select all of the documents in a document set, click **Select Document Set** . To select specific documents in a document set, click the document set title row to expand it. Then, click **Select Document** next to the desired documents. If **Select Document** is not available for a particular document, then that document is already included. If **Select Document Set** is not available, then at least one document from the document set is already included.

4 Once a document is selected, the Selected Documents area displays all of the chosen documents. The documents listed in the Selected Documents area will not be available in the Documents Library or Document Sets Library again for that session unless the documents are deleted from the Selected Documents area.

Make changes to the Selected Documents area as necessary. Refer to **Create New Session (XML Only)** on page **138** for details about the icons and controls on this page.
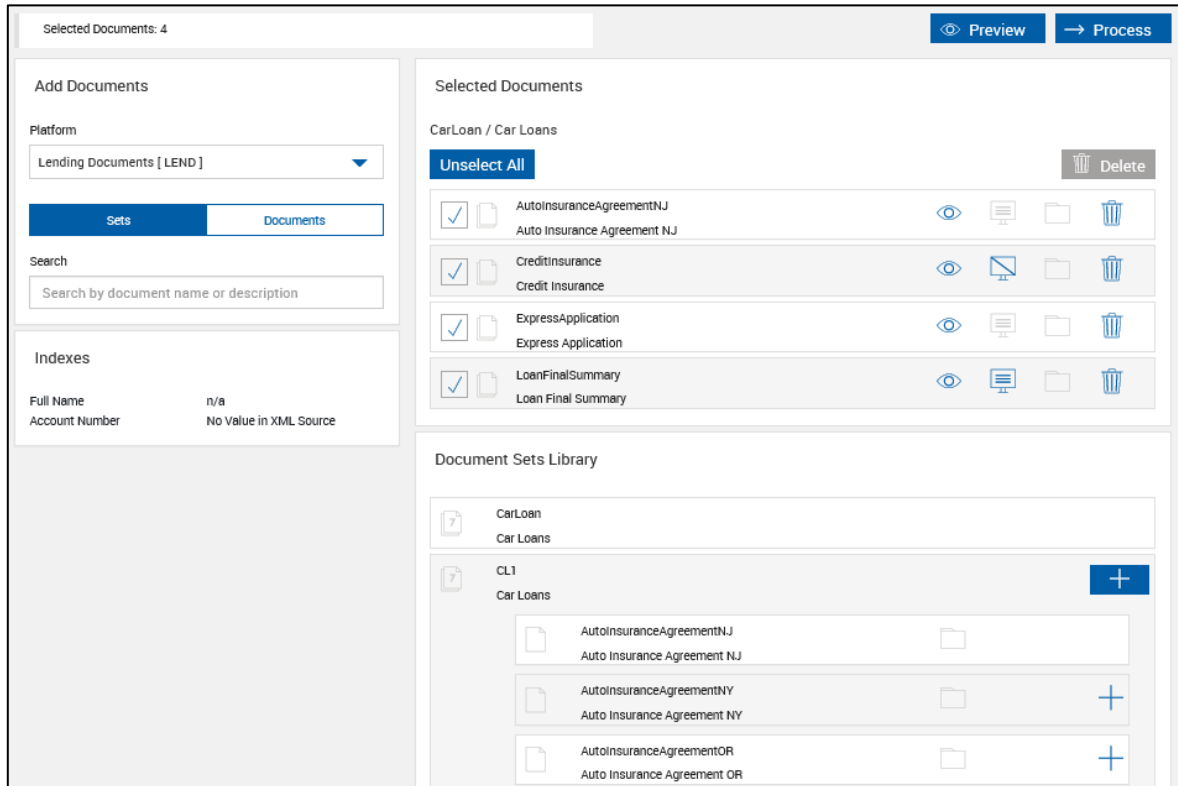
5 Once you are done adding documents to the session, click **Process**. Refer to **Processing Documents** on page **57** for details.

Once the documents are processed, the Session Details page is displayed. Refer to **Session Details** on page **152** for details.
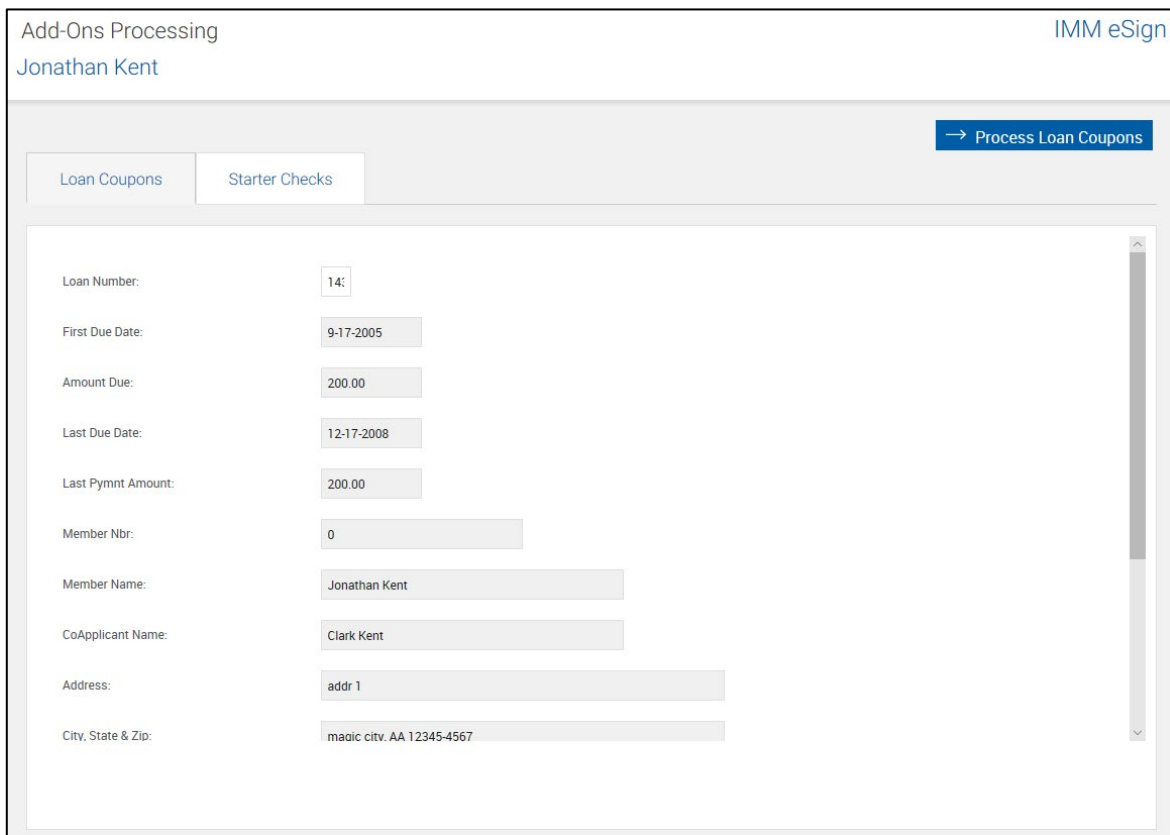
Processing Add-Ons

If the Loan Coupons and/or Starter Checks add-ons have been activated, you will see the **Processing** > **Loan Coupons** and/or **Processing** > **Starter Checks** menu options. When one of these options is clicked, the Add-Ons Processing page is displayed.

Processing Loan Coupons

1   Click **Processing** > **Loan Coupons** to display the Add-Ons Processing page. Prepopulated data cannot be edited on this page.

2   Enter information in the fields as necessary. Fields marked with a red asterisk (*) must be completed.

> ℹ️   To determine the **Coupon Start Number** for parties who have had Loan Coupons before, refer to the **Starting #** column and the **Coupons/Printed** column from the Add-Ons Report. For example, if the most recent **Starting #** is 1 and **Coupons/Printed** is 12, the next **Coupon Start Number** is 13. Refer to **Add-Ons** on page **175** for details about generating an Add-Ons Report.

3   Click **Process Loan Coupons**. The Loan Payment Coupon Book is displayed.

4   Print the Loan Coupons from this popup.

> ℹ   If printing to a duplex capable printer, ensure the setting is not set to duplex.

Processing Starter Checks

1 Click **Processing** > **Starter Checks** to display the Add-Ons Processing page. Prepopulated data cannot be edited on this page.

2 Enter information in the fields as necessary. Fields marked with a red asterisk (*) must be completed.

> To determine the **Check Start Number** for parties who have had Starter Checks before, refer to the **Starting #** column and the **Checks Printed** column from the Add-Ons Report. For example, if the most recent **Starting #** is 1 and **Checks Printed** is 12, the next **Check Start Number** is 13. Refer to **Add-Ons** on page **175** for details about generating an Add-Ons Report.

3 Click **Process Starter Checks**. The Starter Checks are displayed.

4 Print the Starter Checks from this popup.

> *i* If printing to a duplex capable printer, ensure the setting is not set to duplex.

Previewing and Printing Documents

Preview

> ℹ️ Preview may not be available for your installation. Contact your Administrator for more information.
>
> Documents can be previewed from two locations: the Session Details page and the eSignature Management page.
>
> Documents may be viewed or printed only
>
> Documents cannot be edited or saved in Preview mode.

From the Session Details page, click the **Preview** icon to view a single document in a PDF popup window.

Click the **Preview** icon for the Document Set to view all documents in the set in a PDF popup window. Use the scroll bar to view multiple documents.

Print

To print documents, click the **Preview** icon. In the Adobe popup window, click the printer icon.

The Print window is displayed. Change the print options as necessary. Click **Print**. To cancel printing, click **Cancel** or close the Print window.

Using Document Designer

> ⓘ Signed documents cannot be modified.
>
> Document Designer is not available for iPad users except when there are unmapped/optional fields. When unmapped or optional fields are detected, you are rerouted to the Document Designer page instead of the eSignature Management page.
>
> Document Designer is not available for eSign Lite installations.
>
> For XML sessions, full Document Designer functionality is only available for attachments. Document Designer is not available for XML documents. XML documents cannot be modified.
>
> In this section, screenshot examples reflect RTS sessions except where noted.

Overview

You can access the Document Designer from the Session Details page or eSignature Management page.

Refer to **Document Designer** on page **155** for details on the Document Designer page.

Navigate to the desired document using the up ⌃ or down ⌄ arrows or by clicking the document name in the Documents list.

This is an example of an RTS document in Document Designer. For RTS sessions, the Document Designer page allows you to assign a template to unknown documents, map unmapped fields, and set optional fields as required or not. You can add, edit or delete signature fields, signature date fields, initial fields, textboxes, checkboxes, and dropdown lists. In addition, this page can also be used to add, edit or delete signer (party) information. Using the Request Attachments button, attachments can be requested from remote parties. Once requested, remote attachments are listed in the Documents list on the Document Designer page.

This is an example of an XML document in Document Designer. For XML sessions, the Document Designer page allows you to set optional fields as required or not. For attachments, you can add, edit or delete signature fields, signature date fields, initial fields, textboxes, checkboxes, and dropdown lists. Using the Request Attachments button, attachments can be requested from remote parties. Once requested, remote attachments are listed in the Documents list on the Document Designer page.

For XML sessions, signer (party) information cannot be added, edited, or deleted. XML documents cannot be modified unless they are attachments.

The following example displays the Review Optional button because optional signatures/initials are detected. When optional signatures/initials are not detected, the Review Optional button is not displayed.

Refer to **RTS-Only Procedures** on page **28** for more information about using Document Designer in an RTS environment. Refer to **XML-Only Procedures** on page **39** for more information about using Document Designer in an XML environment.

RTS-Only Procedures

Assigning a Template to Undefined Documents

When a document that has not been defined is processed, individually or as a part of a set, the document appears on the Session Details page using the naming convention assigned by your FI Administrator.

> The default naming convention for unknown documents is "Undefined." "Undefined" is used throughout this section as an example. The naming convention is configurable by your FI Administrator.

> **STOP** The undefined document will not be archived until it has been assigned to a template.
>
> An undefined document cannot be archived. Document sets containing undefined documents cannot be archived. Other documents in the set can be individually archived if they do not have any unsigned signature fields.
>
> The document set remains as a saved session. This allows your administrator to define the document or remove the document from the document set.
>
> Editing index information for undefined documents may result in invalid index information.
>
> When the document is defined, index values from the document may overwrite the values entered at this time.

When the undefined document is expanded on the Session Details page, the indexing information is not available. Refer to the following example.

To assign a template to undefined documents, click **Design** on the Session Details page to open the Document Designer page.

1 On the Document Designer page, click the **Template** dropdown and select a template from the list, or click **Remove** to delete the undefined document from the document set.

When **Remove** is selected for an undefined document, a check mark appears in the button and the **Template** dropdown is disabled.

To cancel the deletion, click **Remove** again. The check mark will disappear and the **Template** dropdown will become enabled again.

Undefined documents are not deleted from the set until the **Apply** button is clicked.

2   If there is more than one undefined document, click **Next** to move to the next document. Repeat Steps 1 and 2 for each undefined document.
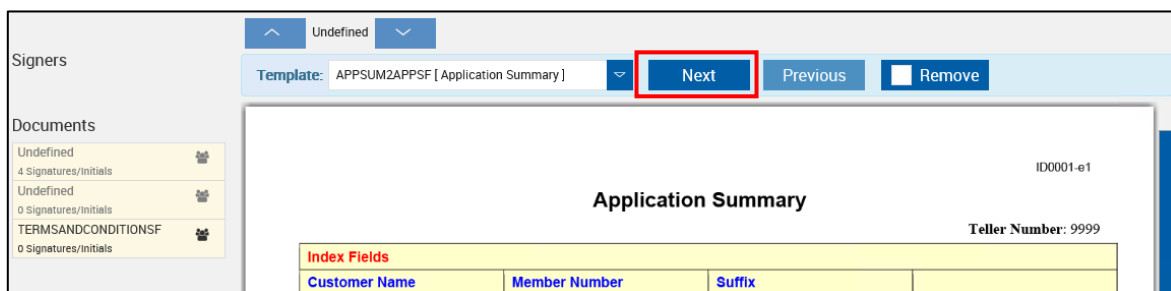
To move to a previous document, click **Previous**.

3   When you are done assigning templates and removing undefined documents, click **Apply**. The templates are assigned to the documents and undefined documents are deleted from the document set.
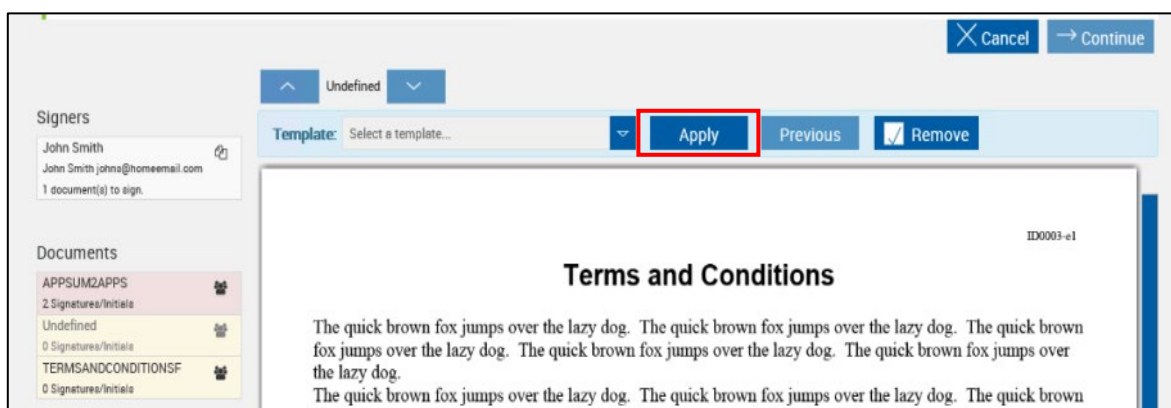
If unmapped or optional fields are detected, the Document Designer page refreshes in the Manage Unmapped Fields mode. Refer to **Managing Unmapped and** Optional Fields on page **31**.

If no unmapped or optional fields are detected, the Document Designer page refreshes. Refer to **Reviewing Assignments** on page **33** to continue making changes to the document set in Document Designer.

4   After a template is assigned to a document and changes are applied, the document information is updated on the Session Details page.

Managing Unmapped and Optional Fields

> Document Designer is not available for iPad users except when there are unmapped/optional fields. When unmapped or optional fields are detected, you are rerouted to the Document Designer page instead of the eSignature Management page. The Document Designer page opens in Manage Unmapped Fields mode.

> Optional signatures are configured by your Administrator in AIM.

When unmapped or optional fields are detected, the Document Designer page opens in Manage Unmapped Fields mode. If you review optional signatures/initials and then add a third-party document that has optional signatures, you will be prompted to review all fields in the session again.

1   In the popup window that is displayed on the Document Designer page, select the information as necessary.

1   Click **Add Signer** if the signer is not listed in the Signers list on the Document Designer page. Refer to **Add Signer** on page **37** for details about adding a signer.

2   Select a signer using the dropdown list if the field is not autopopulated.

3   If the **Required** checkbox is editable, this field is an optional field. Select **Required** if the signer must enter a signature or initial in the field. If the **Required** checkbox is not selected, the signer will not enter a signature or initial in the field. If the **Required** checkbox is selected and not editable, the field is not optional and the signer must enter a signature or initial in the field.

4   When changes are complete, click **Next** to navigate to the next field.

After the first field is done, the popup also displays a **Back** button. Click the **Back** button to navigate to the previous field or click the **Next** button to navigate to the next field. At the last unmapped/optional field, the **Next** button is replaced with the **Done** button.

2   When you are finished, click **Done**. You are exited from Manage Unmapped Fields mode.

Reviewing Assignments

1   On the Document Designer page, click **Review Assignments**.

2 In Review mode, navigate to each signature/initial field in the document set using the **Next** button.

Edit the signer assigned to the field by clicking the icon.

Exit Review mode by clicking the **Exit Review Mode** button and then clicking **Exit** in the confirmation window.

3 In the popup window that is displayed after clicking the [icon] icon, select a different signer using the dropdown list or click **Add Signer** to add a new signer. Refer to **Add Signer** on page **37** for details about adding a signer.

When changes are complete, click **Next** to navigate to the next signature/initial field.

After the first signature field, the popup displays **Back** and **Next** buttons as shown below. Click the **Back** button to navigate to the previous signature/initial field or click the **Next** button to navigate to the next signature/initial field.

4 At the last signature/initial field in the document set, the **Next** button is replaced with the **Done** button.

If editing the signer assigned to the last field, the **Next** button in the popup window is also replaced with **Done**.

5 When you are finished reviewing the signature/initial field assignments, click **Done** on the Document Designer page or in the popup window. You are exited from Review mode.

Adding, Editing, and Removing Signers

Add Signer

1 From the Document Designer page, click **Add Signer**.

2 Complete the **Signer Name** and **Email** information.

Click **Save**.

3 The new signer will be added to the list of Signers and displays yellow, indicating the signer is not associated with any signature fields in any documents.

This signer can now be associated with a signature/initial field within the session.

Edit Signer

1   From the Document Designer page, double-click the name of the signer to be edited.
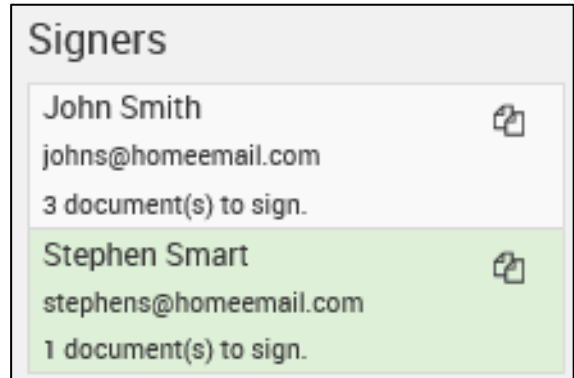
2   Edit the **Signer Name** and **Email** information.

Click **Save**.

Remove Signer

Signers cannot be removed from the list until fields associated with that signer have been removed from all documents.

1   From the Document Designer page, click the name of the signer to be deleted.
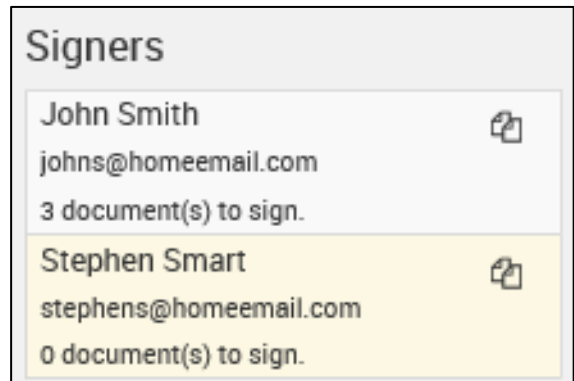
2 Click **Remove Signer**. If the signer is still associated with fields in the session, the **Remove Signer** button will not be displayed.

Click **OK** on the confirmation popup.

The signer is removed from the Signers area.

XML-Only Procedures

Reviewing Optional Signatures/Initials

> ℹ️ Optional signatures are preconfigured in third-party documents or uploaded PDFs.

When optional signatures and initials are detected in third-party documents or uploaded PDFs, the Document Designer page opens in Review mode and displays the Review Optional button. If you review optional signatures/initials and then add a third-party document that has optional signatures, you will be prompted to review all optional signatures/initials in the session again. Parties cannot be added or edited.

Exit review mode by clicking the **Exit Review Mode** button and then clicking **Exit** in the confirmation window. To return to Review mode, click **Review Optional**.

To review the optional signatures and initials, perform the following procedure:

1 Select the **Required** checkbox to collect a signature or initial in that field.
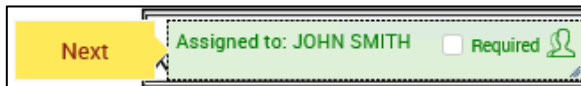
Alternatively, click the icon to open the field popup and select the **Required** checkbox to collect a signature or initial in that field.
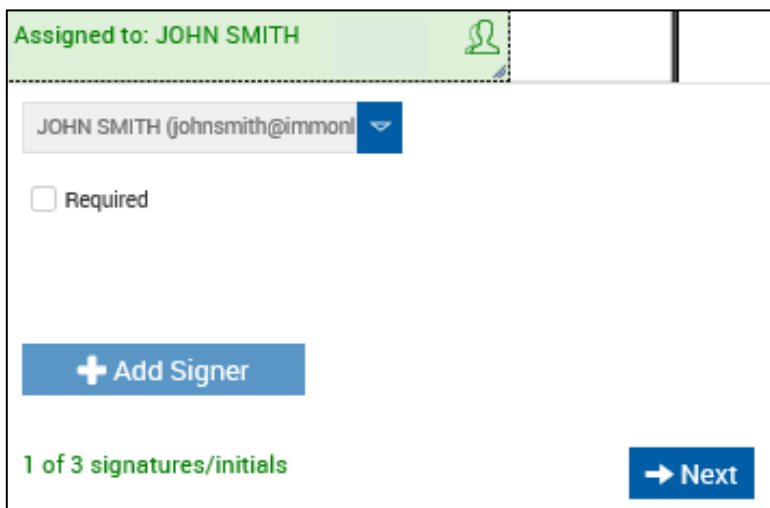
If the **Required** checkbox is not selected, the signer will not provide a signature/initial for that field.

2 Navigate to each signature/initial field in the document set using the **Next** button.

After the first field, the popup displays **Back** and **Next** buttons as shown below. Click the **Back** button to navigate to the previous signature/initial field or click the **Next** button to navigate to the next signature/initial field.

At the last signature/initial field in the document set, the **Next** button is replaced with the **Done** button.

The **Next** button in the popup window is also replaced with **Done**.

3   When you are finished reviewing the optional signatures/initials, click **Done**. You are exited from Review mode.

To get back to Review mode, click **Review Optional**.

Moving and Resizing Fields

After a field is placed, it can be repositioned or resized.

Moving Fields

Move – 4-Headed Arrow

1. Hover the mouse pointer over the field until the 4-headed arrow pointer is displayed.

2. Drag the field to the desired location on the document.

3. Release the mouse pointer to drop the field in the new location.

Resizing Fields

Resize – 2-Headed Arrow

1. Hover the mouse pointer over the field until the 2-headed arrow pointer is displayed.

2. Position the Arrow on a corner of the field box and drag to the desired size

3. Release the mouse when the desired field size is achieved. Repeat the process for height and/or width sizing.
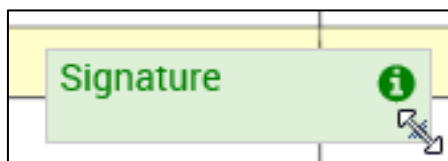
Adding, Editing, and Deleting Fields

When a document has been selected and opened from the Document Designer page, any of the following fields can be added and defined using the Document Designer:

Signature and Initial Fields

Textbox Fields

Checkbox Fields

Dropdown Fields

Signature and Initial Fields

Add Signature and Initial Fields

1 On the Document Designer page, select the signer from the Signers list to associate a field with a signer, and select the document from the Documents list.

2   Click and drag the **Signature** or **Initial** button into the document to place the field.
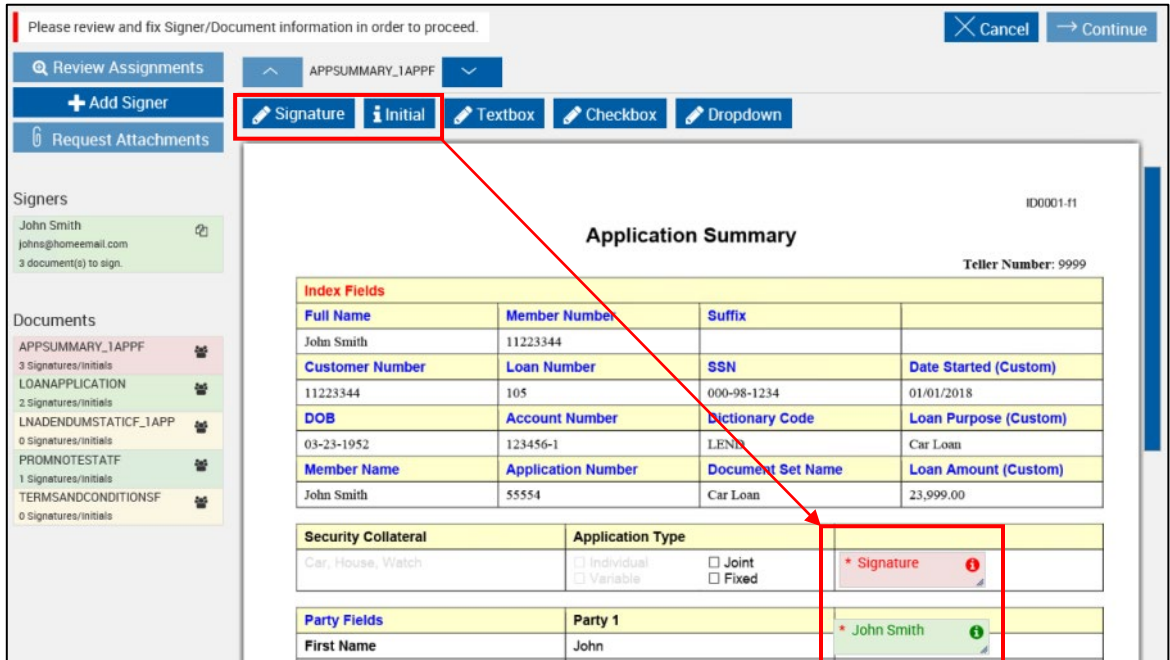
Signature/Initial fields *not associated* with a signer will display in red.

Signature/Initial fields *associated* with a signer will display in green.

3   After the field is placed, it can be repositioned or resized. Refer to **Moving and Resizing Fields** on page **42**.

4   Double-click the field to open the Signature or Initial Field Information popup.

Signature Field Not Associated with a Signer	Signature Field Associated with a Signer
• **Select a Signer** from the dropdown list. • Click **Add Signature Date** to add a signature date field.	• Click **Add Signature Date** to add a signature date field.

Click **Save** when complete.

Edit or Delete Signature and Initial Fields

Double click on the signature, signature date, or initial field to open the Signature Field Information or Initial Field Information popup. Double-clicking on a Signature Date field will open the associated Signature Field Information popup.

Signature Field	Initial Field
Signature Field Information **Signer:** John Smith (johns@homeemail.co ▽ ☑ Required Signature has a date field associated with it. **Remove Signature Date** 💾 Save ✕ Cancel 🗑 Delete The **Signature Date** field can be removed without affecting the signature field.	Initial Field Information **Signer:** John Smith (johns@homeemail.co ▽ ☑ Required 💾 Save ✕ Cancel 🗑 Delete

To edit the field, modify the field information as necessary, and then click **Save**.

To delete the field, click **Delete**. Deleting a signature field will also delete any associated signature date field.

Textbox Fields

Add Textbox Fields

1   Click and drag the **Textbox** button into the document to place a textbox.

Textbox fields *not associated* with a signer, role or type will display in red.

Textbox fields *associated* with a signer, role or type will display in green.

2   After the field is placed, it can be repositioned or resized. Refer to **Moving and Resizing Fields** on page **42**.

3 Double-click the field to open the Textbox Field Information popup.

Textbox Field Not Associated with a Signer, Role or Type	Textbox Field Associated with a Signer, Role or Type
Textbox Field Information **General Information** ① Role/Type: Please select...▽ **Please select a party for this Textbox field.** ② Current Value: **Data Locking** ③ ☐ Keep unlocked for the selected party in remote signing ④ → ☐ Must Enter Value ⑤ → 🖫 Save ✕ Cancel 🗑 Delete	Textbox Field Information **General Information** Role/Type: John Smith (johns@homeemail.co▽ Current Value: **Data Locking** ☐ Keep unlocked for the selected party in remote signing ☐ Must Enter Value 🖫 Save ✕ Cancel 🗑 Delete

1 **Role/Type**: The Role/Type of this field when processed through IMM eSign. Enables or disables the field based on signer.

- **Generic Locked**: Locked if *any signer* has signed the session. (In branch processing only)

- **Generic Unlocked**: *Always unlocked* regardless of signature status. (In branch processing only)

- **Party**: Field will be locked/disabled after the *selected party* has *signed all documents* in the session.

2 **Current Value**: If the document has not been processed, this will be the default value. If the document has been processed, this field will update to show any changed value.

3 **Keep Unlocked for the selected party in remote signing**: When checked, this keeps the field unlocked when *signing remotely*. (Only enabled when item 1 is a party.)

4 **Must Enter Value**: Requires the field to be populated when *signing remotely*. (Only enabled when item 1 is a party and item 3 is checked.)

5 **Action Buttons**:

- Click **Save** to save and continue.

- Click **Cancel** to prevent saving changes.

- Click **Delete** to remove the current field.

Edit or Delete Textbox Fields

Double click on the textbox field to open the Textbox Field Information popup.

To edit the textbox field, modify the field information as necessary, and then click **Save**.

To delete the textbox field, click **Delete**.

Checkbox Fields

Add Checkbox Fields

1   Click and drag the Checkbox button into the document to place the field.

Checkboxes *not associated* with a signer, role or type will display in red.

Checkboxes *associated* with a signer, role or type will display in green.

2   After the field is placed, it can be repositioned or resized. Refer to **Moving and Resizing Fields** on page **42**.

3 Double-click the field to open the Checkbox Field Information popup.

Checkbox Field Not Associated with a Signer, Role or Type	Checkbox Field Associated with a Signer, Role or Type
Checkbox Field Information **General Information** ① Role/Type: Please select... **Please select a party for this Checkbox field.** ② Current Value: Unchecked ③ Caption: **Data Locking** ④ ☐ Keep unlocked for the selected party in remote signing ⑤ ☐ Must Enter Value ⑥ → 💾 Save ✕ Cancel 🗑 Delete	Checkbox Field Information **General Information** Role/Type: John Smith (johns@homeemail.co ▾ Current Value: Unchecked Caption: **Data Locking** ☐ Keep unlocked for the selected party in remote signing ☐ Must Enter Value 💾 Save ✕ Cancel 🗑 Delete

1 **Role/Type**: The Role/Type of this field when processed through IMM eSign. Enables or disables the field based on signer.

- **Generic Locked**: Locked if *any signer* has signed the session. (In branch processing only)

- **Generic Unlocked**: *Always unlocked* regardless of signature status. (In branch processing only)

- **Party**: Field will be locked/disabled after the *selected party* has *signed all documents* in the session.

2 **Current Value**: *Checked* or *Unchecked*. If the document has not been processed, this will be the default value. If the document has been processed, this field will update to show any changed value.

3 **Caption**: Create a caption for a checkbox field. After the field information has been saved, the caption region can be moved and resized as necessary.

4 **Keep Unlocked for the selected party in remote signing**: When checked, this keeps the field unlocked when *signing remotely*. (Only enabled when item 1 is a party.)

5 **Must Enter Value**: Requires the field to be populated when *signing remotely*. (Only enabled when item 1 is a party and item 3 is checked.)

6 **Action Buttons**:

- Click **Save** to save and continue.

- Click **Cancel** to prevent saving changes.

- Click **Delete** to remove the current field.

Edit or Delete Checkbox Fields

Double click on the checkbox or its caption field to open the Checkbox Field Information popup.

To edit the textbox field, modify the field information as necessary, and then click **Save**. The **Checkbox Caption** can be removed without affecting the checkbox field.

To delete the textbox field, click **Delete**. Deleting a checkbox field will also delete any associated caption field.

Dropdown Fields

Add Dropdown Fields

1 Click and drag the Dropdown button into the document to place the field.

Dropdown field information *must always be updated*, even when it is associated with a signer. As such, added Dropdown fields will always be displayed in red.

2 After the field is placed, it can be repositioned or resized. Refer to **Moving and Resizing Fields** on page **42**.

3   Double-click the field to open the Dropdown Field Information popup.

1   **Role/Type**: The Role/Type of this field when processed through IMM eSign. Enables or disables the field based on signer.

- **Generic Locked**: Locked if *any signer* has signed the session. (In branch processing only)

- **Generic Unlocked**: *Always unlocked* regardless of signature status. (In branch processing only)

- **Party**: Field will be locked/disabled after the *selected party* has *signed all documents* in the session.

2   **Dropdown values**: These will be the values a signer can choose from when signing a document.

3   **Current Value**: If the document has not been processed, this will be the default value. If the document has been processed, this field will update to show any changed value.

4   **Keep Unlocked for the selected party in remote signing**: When checked, this keeps the field unlocked when *signing remotely*. (Only enabled when item 1 is a party.)

5   **Must Enter Value**: Requires the field to be populated when *signing remotely*. (Only enabled when item 1 is a party and item 4 is checked.)

6   **Action Buttons**:

- Click **Save** to save and continue.

- Click **Cancel** to prevent saving changes.

- Click **Delete** to remove the current field.

Edit or Delete Dropdown Fields

Double click on the dropdown field to open the Dropdown Field Information popup.

To edit the dropdown field, modify the field information as necessary, and then click **Save**.

To delete the dropdown field, click **Delete**.

Requesting Attachments

Supporting documents such as pay stubs, W2s, Driver License, Passport, etc. can be requested as required from a remote signer by using the **Request Attachments** option.

> The Request Attachments button is only enabled for sessions that will be sent for Remote Signature.
>
> Attachments can be requested from the Document Designer page or the eSignature Management page.
>
> Encrypted PDF documents cannot be attached.
>
> Attached documents must be less than 5 MB in size.
>
> A maximum of 10 documents can be attached per session.
>
> A maximum of 100 document pages can be attached when the session will be sent for remote signatures.
>
> Supported file formats are BMP, GIF, JPEG, JPG, PDF, PNG, TIF, and TIFF.
>
> Attachments will be downloaded as PDF documents. All attachments will be converted to PDF documents and saved as separate files.

Prior to requesting attachments, a signer must be designated to sign remotely. Refer to **eSignature Management** on page **158** for details.

To request remote attachments, perform the following procedure:

1　On the Document Designer page or eSignature Management page, click **Request Attachments**.

2　If the Session Confirmation page is displayed, review the confirmation and click **Continue**. Refer to **Confirming Changes** on page **57** for details.

3　On the Request Remote Attachments page, select a template from the **Attachment Template** dropdown.

Click **Cancel** to return to the previous page.

4 The Request Remote Attachments page refreshes and lists all documents associated with the attachment template.

All signers are automatically selected. Deselect signers who will not be supplying remote attachments.

5 For each signer, click **Select Index Source Document**.

> *i* The Index Source Document field is not applicable to XML sessions.

The Request Remote Attachments page refreshes listing all indexed documents in the session.

Click to select a **document** as the index source *for that signer*.

Different index sources may be used for additional signers.

6   The Request Remote Attachments page refreshes and displays all preselected attachments for the template.

For each pre-selected attachment in the template,

1/2   **Title/Description**: This information is fixed and cannot be changed.

3   **Required Checkbox**: When checked, the attachment will be a requirement for the signer during remote signing. When this is not checked, providing the attachment will be an option for the signer.

4   **Delete Icon**: Click the icon to remove the attachment from the template for this session.

5   To add additional remote attachments,

1. Select an attachment from the **Select Attachment** dropdown.

2. Check **Required** to require the attachment from the signer during remote signing. When this is not checked, providing the attachment will be an option for the signer.

3. Click **Save**. Click **Clear** to not add the additional remote attachment.

6   **Request Remote Attachments Action Buttons**:

- Click **Save** to save remote attachments options and return to the previous page (Document Designer page or eSignature Management page).

- Click **Cancel** to exit remote attachments options without saving changes.

7 When returning to the Document Designer, the requested remote attachment entry will display in the Documents list. When the requested remote attachment entry is selected, the requested remote attachments are listed.

Required remote attachments have a red border.

Remote attachment requests cannot be modified on this page.

Confirming Changes

The Session Confirmation page is displayed in some installations (*FI Administrator setting*) after all signatures have been assigned, all other changes completed, and the **Continue** button is clicked in Document Designer.
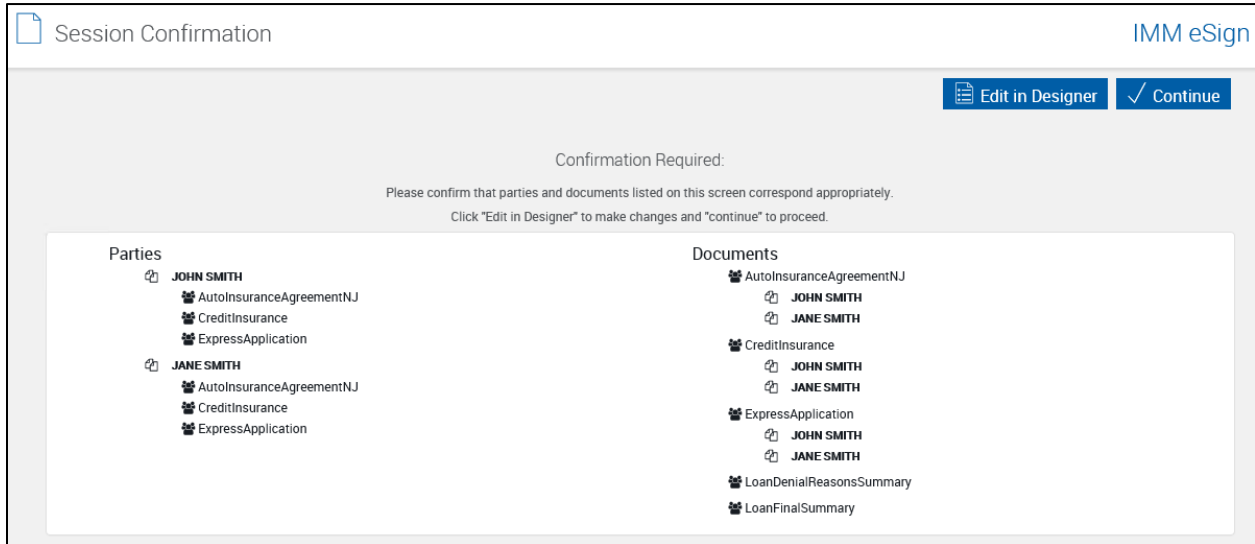
After reviewing the page,

- Click **Edit in Designer** to return to the Document Design page.

- Click **Continue** to return to the page where the Document Designer page was accessed from.

Processing Documents

> This feature is not available for iPad users.

Click **Process** to process and update the session.

Selecting a Workflow

For IMM eSign *plus* sessions that have not been assigned a workflow, the Select Workflow popup is displayed when **Process** is clicked. If the session only has one possible workflow, the

Select Workflow popup will not be displayed. The following screenshot is an example. The visible fields are dependent on your integration and configured by your administrator.
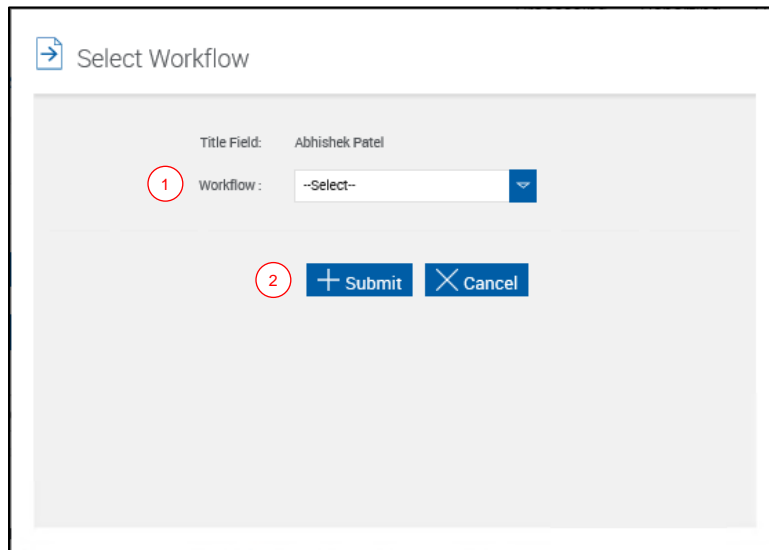
1 **Workflow**: Select a workflow from the **Workflow** field to assign the session to a workflow.

2 **Submit** or **Cancel**: Click **Submit** to save changes and proceed. Click **Cancel** to exit the Select Workflow popup without saving changes.

Verifying Information

> Do not use the Internet Explorer Back button while processing document sessions.

Click **Process** on the Session Details page. The documents marked for display will open.

When the Highlight Fields button is selected, fields that can be modified will display in a different color.
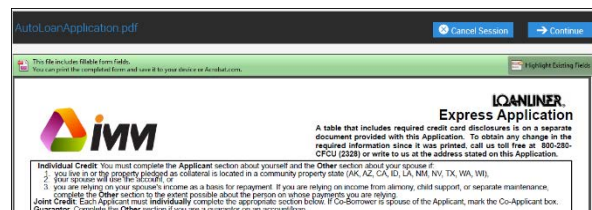
> The Tools, Sign and Comment buttons on the Adobe Reader menu should not be used in IMM eSign.

Verify and enter any required information.

- **Cancel Session**: Clicking this button will cancel the current session. The documents, any changes made and the session will be discarded.

- **Continue**: When all changes have been made to the current document, click this button to continue to the next document. If there are no more documents to process, you will continue to the Documents Submitted page.

Changing Text Fields and Checkboxes

As the documents appear, scroll to a text box or checkbox.

The first time a text field, checkbox or signature field is selected, the Cannot Save Form Information page is displayed.

Select **Don't show again**.

Click **Close** to continue.
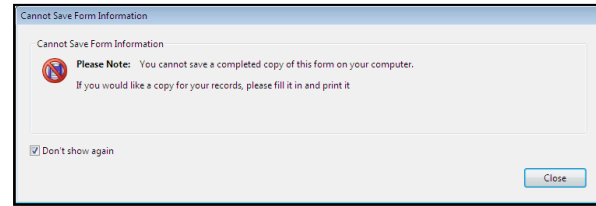
Make changes as necessary.

To cancel the session, click **Cancel Session**.

To continue with the session, click **Continue**.
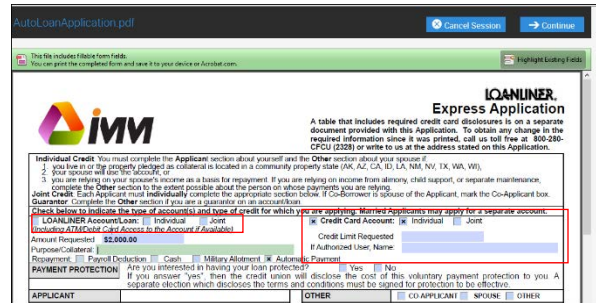
Processing Undefined Documents

When a document that has not been defined is processed, individually or as a part of a set, the document appears on the Session Details page using the naming convention assigned by your FI Administrator (e.g., "Undefined"). A session with an undefined document can only be partially processed.

> The default naming convention for unknown documents is "Undefined." "Undefined" is used throughout this section as an example. The naming convention is configurable by your FI Administrator.

> The undefined document will not be archived until it has been assigned to a template.
>
> An undefined document cannot be archived. Document sets containing undefined documents cannot be archived. Other documents in the set can be individually archived if they do not have any unsigned signature fields.
>
> The document set remains as a saved session. This allows your administrator to define the document or remove the document from the document set.
>
> Editing index information for undefined documents may result in invalid index information.
>
> When the document is defined, index values from the document may overwrite the values entered at this time.
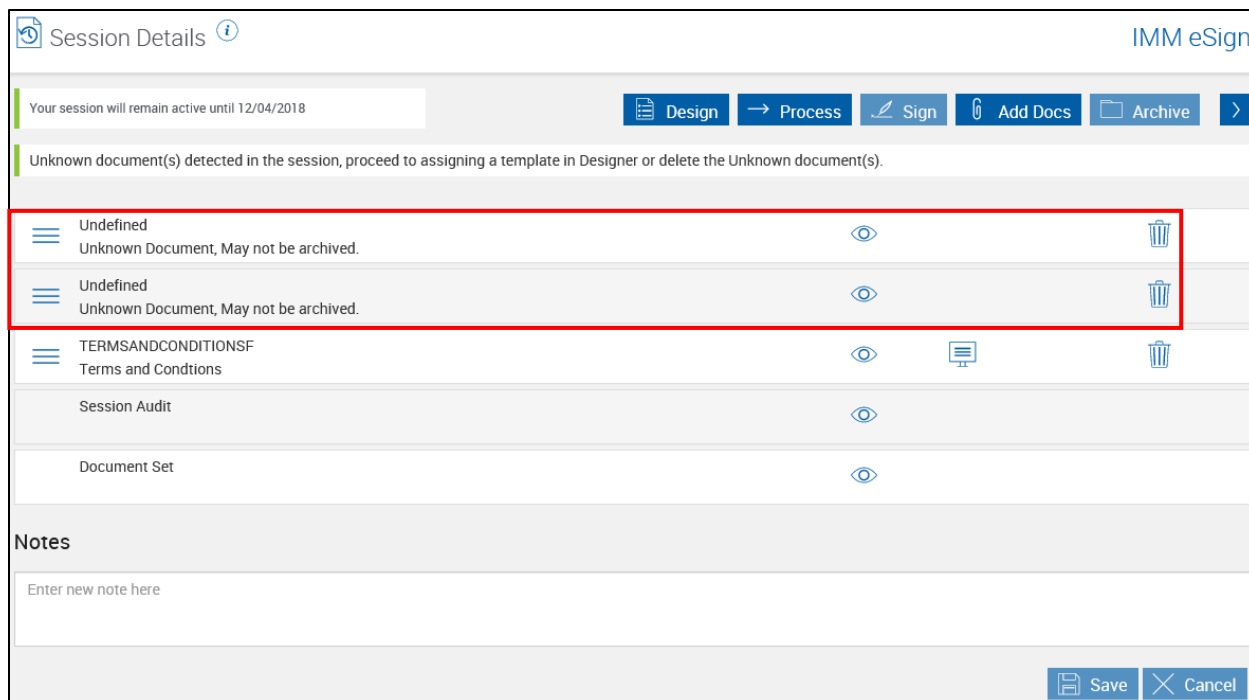
Assign a template to undefined documents to proceed. Refer to **RTS-Only Procedures Assigning a Template to** Undefined Documents on page **28** for details.

Adding Documents

> Encrypted PDF documents cannot be attached.
>
> Attached documents must be less than 5 MB in size.
>
> A maximum of 10 documents can be attached per session.
>
> A maximum of 100 document pages can be attached when the session will be sent for remote signatures.
>
> Supported file formats are BMP, GIF, JPEG, JPG, PDF, PNG, TIF, and TIFF.
>
> Attachments will be downloaded as PDF documents. All attachments will be converted to PDF documents and saved as separate files.
>
> If using an iPad, refer to **Adding Documents Using an iPad** on page **70**.

There are three ways to add documents to the session using the Add Documents feature.

- When the **Add Docs** button is clicked on the Session Details page, the Add Documents page is displayed. The Add Documents page allows the user to add documents from the document library (XML only), attach external documents, scan items, and add photographs to this session. Refer to the examples in this section for details.
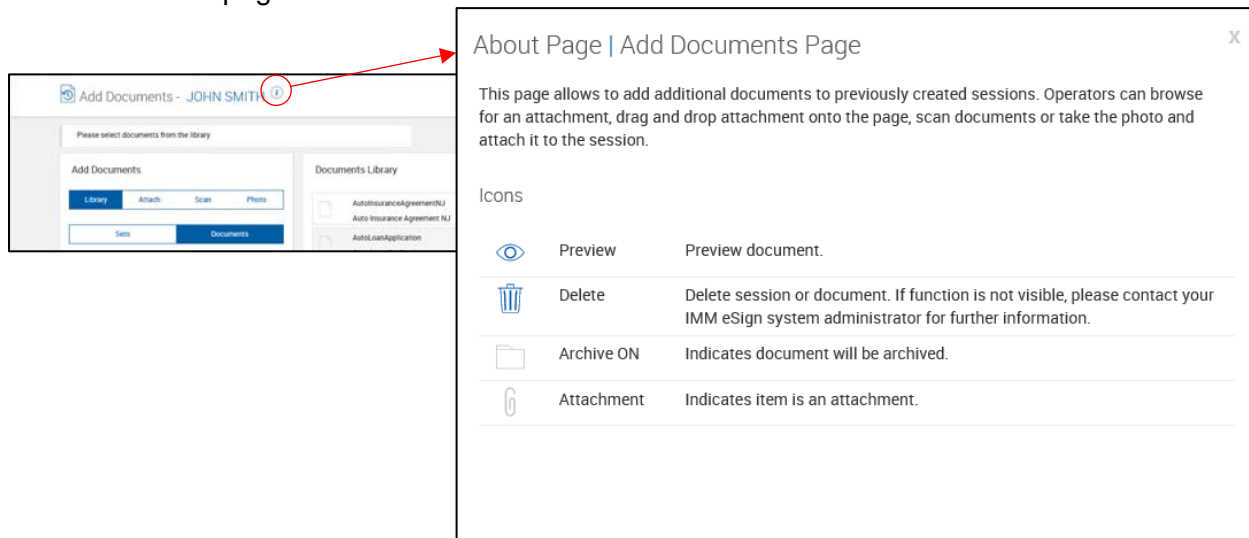
RTS Integrations	XML Integrations

- (XML Only) When data is passed from the core/host system, the New Session page is displayed. The New Session page contains the Add Documents area. The New Session page allows the user to add documents from the document library, attach external documents, scan items, and add photographs to this session before processing. Refer to **Adding and Deleting Documents for a New Session** on page **14** for details about using this page. After processing, add documents to the session using the **Add Docs** button on the Session Details page.

- (XML Only) When **Processing** > **Create New Session** is clicked to create a new session directly in IMM eSign, the New Session page is displayed. The New Session page contains a variation of the Add Documents area. The **Library**, **Attach**, **Scan**, and **Photo** tabs are not available. The page is automatically in Library mode. Refer to **Creating a New Session in IMM eSign** on page **16** for details about using this page. After processing, add documents to the session using the **Add Docs** button on the Session Details page.

Adding documents on the Add Documents page and adding documents on the New Session page are similar processes. The examples in this section show the Add Documents page. For details about the New Session page, refer to **Create New Session (XML Only)** on page **138**.

The Page Help button provides a quick listing of icons and functions available and related to the Add Documents page.
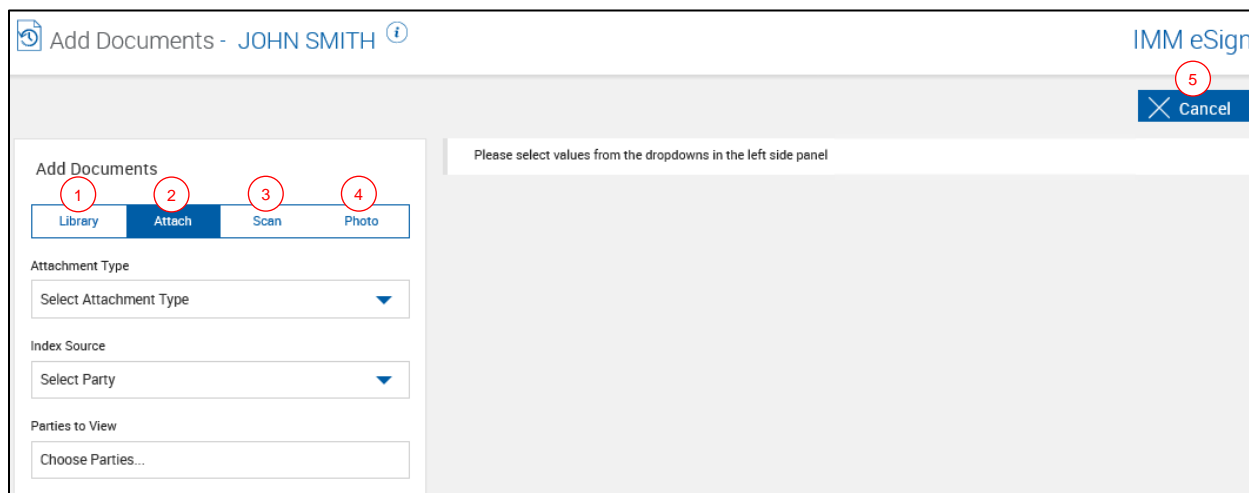
1 **Library (XML Only)**: Click **Library** to add documents or document sets from the library. This option is applicable to XML sessions only. For RTS sessions, this option is not displayed. For IMM eSign *plus* sessions, this is the only option available. Refer to **Adding Documents from the Library** for details.

2 **Attach**: Click **Attach** to add external documents and attach them to the session. Refer to **Attaching Documents** for details.

3 **Scan**: Click **Scan** to scan documents and attach them to the session. Refer to **Scanning Documents** for details.

4   **Photo:** Click **Photo** to take a photograph and attach it to the session. Refer to **Taking a Photograph** for details.

5   **Cancel**: Click **Cancel** to go back to the Session Details page without saving.

Adding Documents from the Library

1   Click **Library** and select the desired values for each field.
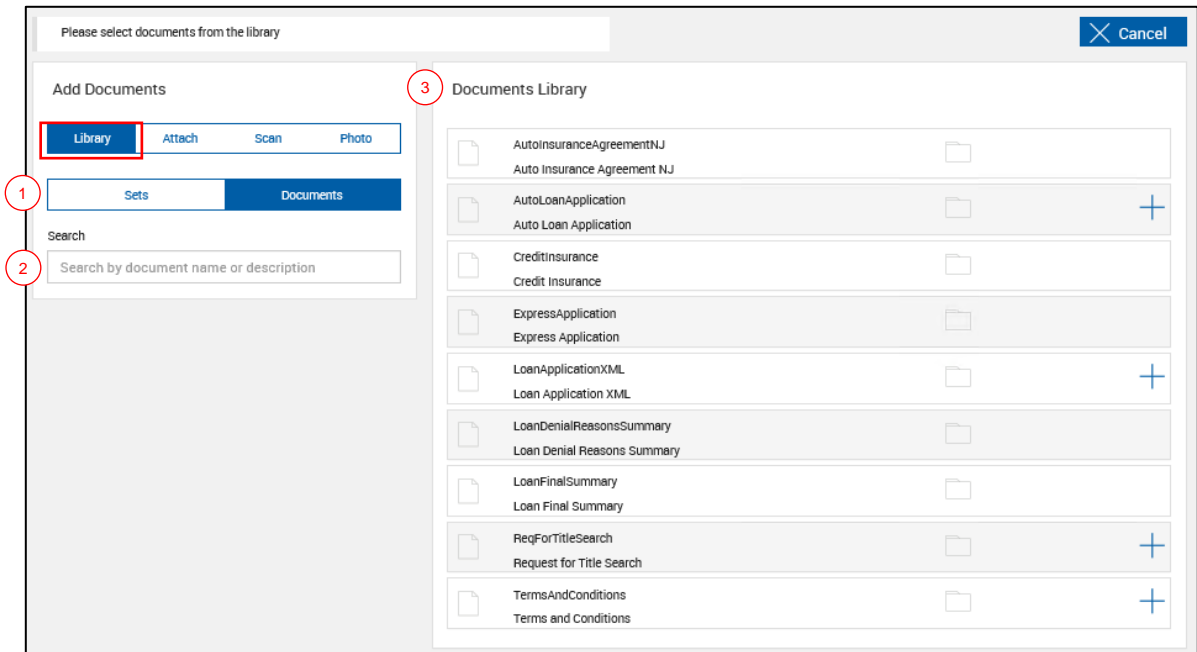
1   **Documents** or **Sets**: If **Documents** is selected, the Documents Library displays all of the documents in the library. If **Sets** is selected, the Document Sets Library displays documents organized by document set.

2   **Search**: Use the **Search** field to search for documents or document sets by name or description. When **Documents** is selected, the search results display documents. When **Sets** is selected, the search results display document sets or document set that contain the document.

3   **Documents Library** or **Document Sets Library**: If **Documents** is selected in the Add Documents area, the Documents Library is displayed. If **Sets** is selected in the Add Documents area, the Document Sets Library is displayed. Collapse or expand the library by clicking on the title row.

2   In the Documents Library, add a document by clicking **Select Document** ┼ next to the desired document. If **Select Document** ┼ is not available for a particular document, then that document is already included.
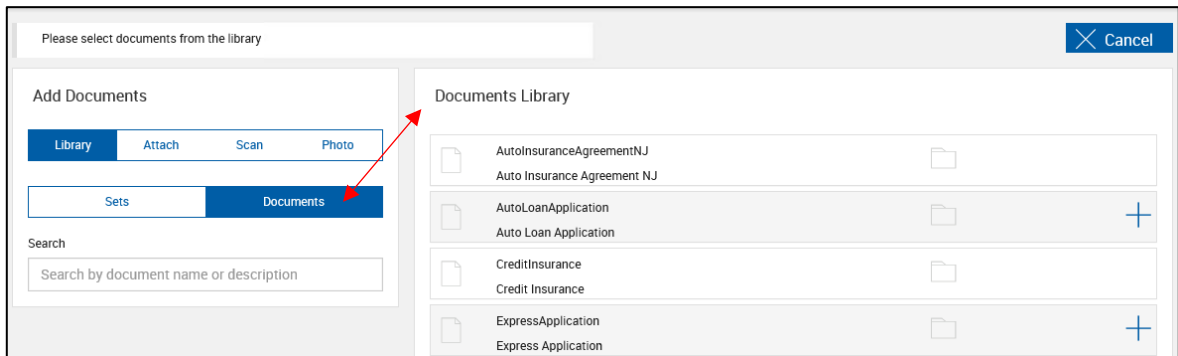
In the Document Sets Library, expand a document set by clicking on the row. Then, click **Select Document** ┼ next to the desired document. To select all of the documents in a document set, click **Select Document Set** ⊞. If **Select Document** ┼ is not available for a particular document, then that document is already included. If **Select Document Set** ⊞ is not available, then at least one document from the document set is already included.
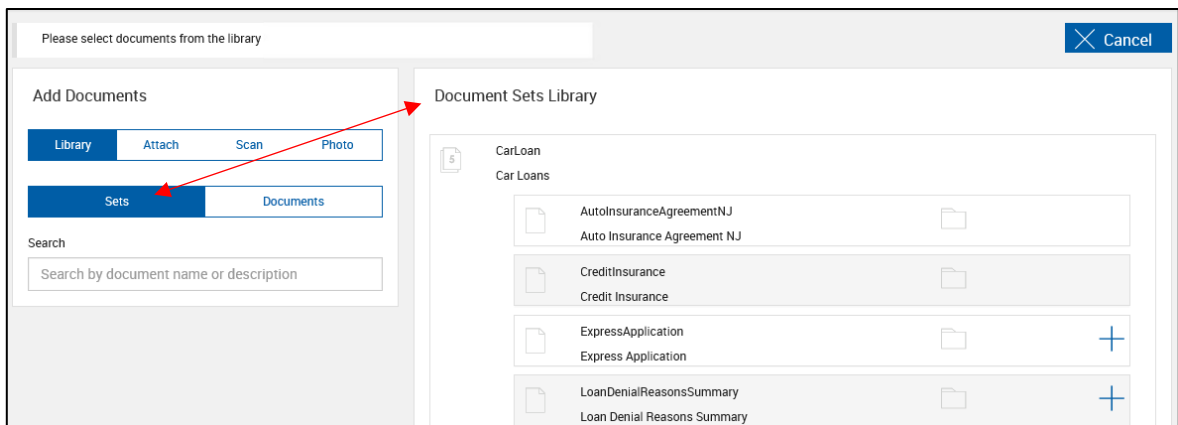
3 The Selected Documents area displays the documents that you choose. The documents listed in the Selected Documents area will not be available in the Documents Library or Document Sets Library again for that session unless the documents are deleted from the Selected Documents area.
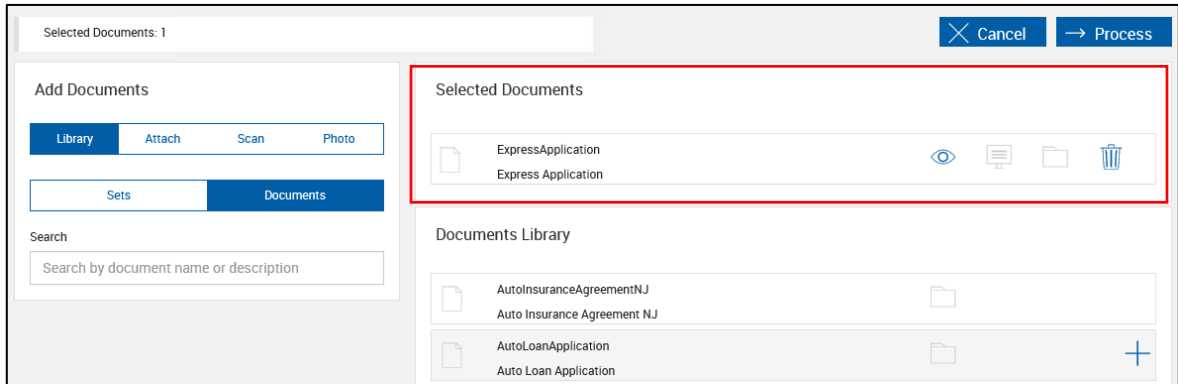
4 When you are done adding documents, click **Process** to process the files and to return to the Session Details page.

For IMM eSign *plus* integrations, you may be prompted to select a workflow when you click **Process**. Refer to Selecting a Workflow on page for details.

Attaching Documents

Attach documents including third-party documents using the **Attach** option. When attaching supported third-party documents, signature fields and parties are automatically recognized.

To attach documents to your sessions, follow these steps.

1 Click **Attach** and select the desired values for each field.
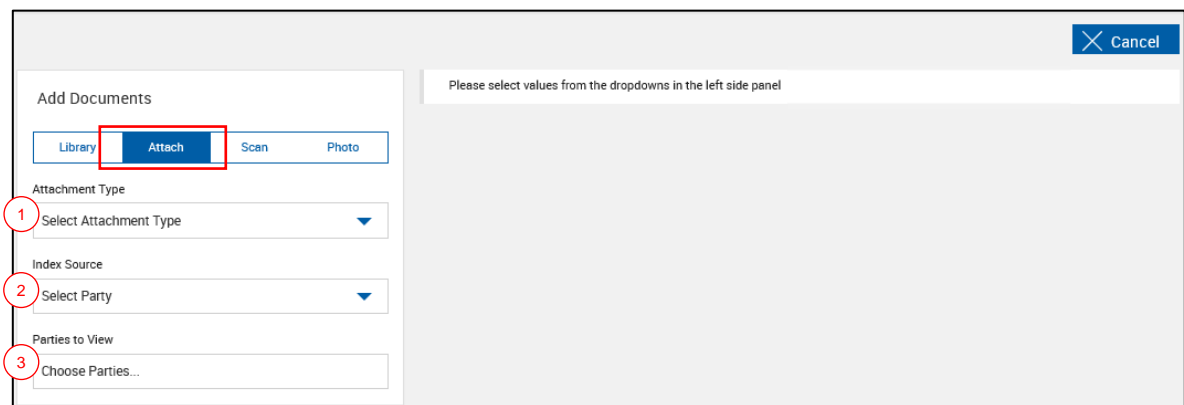
1   **Attachment Type**: Select an attachment type from the dropdown menu.

2   **Index Source**: For XML sessions, select a party to use as an index source (shown). For RTS sessions, select a document to be used as an index source.

3   **Parties to View:** Select one or more parties to have them view the file during the signing and reviewing process.

2   To attach the file, either drag and drop the file from the file location into the **Drop files here or click to select file** box, or click the **Drop files here or click to select file** box to navigate to the file and select it.
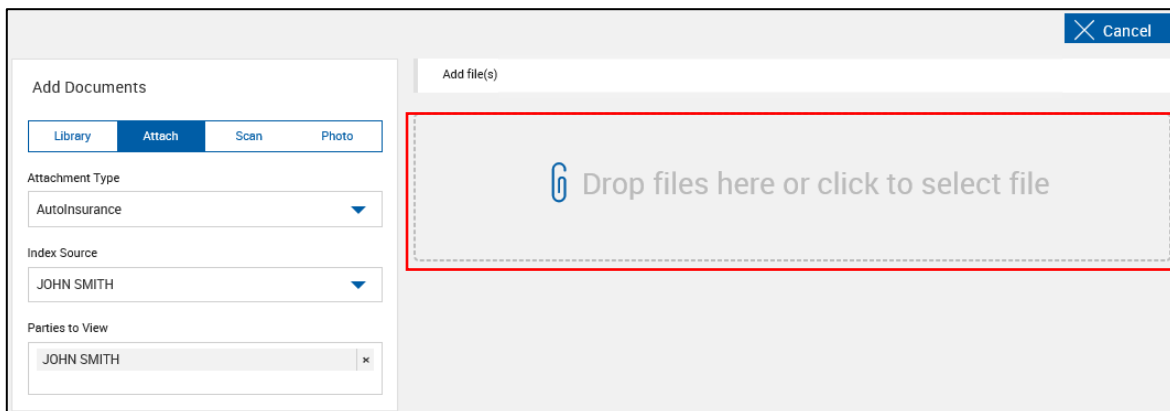
3   The file is uploaded automatically. The uploaded file is listed in the Selected Documents section.

When you are done adding documents, click **Process** to process the files and to return to the Session Details page.
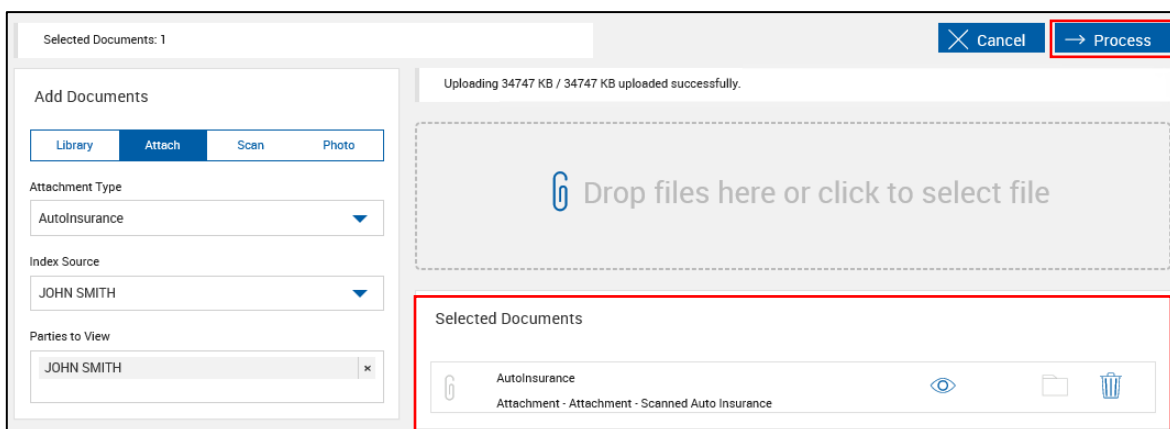
Scanning Documents

Scanning attachments is only supported with Internet Explorer.

When the Show UI scanner setting is enabled, the Scan Panel popup is displayed to start and stop scanning. IMM recommends disabling the Show UI setting. Use of the Scan Panel popup is not recommended with IMM eSign.
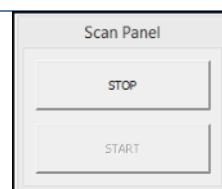
To scan a document for this session, follow these steps:

1 Click **Scan** and select the desired values for each field.

1 **Scanner Name**: The name of the scanner is displayed here.

2 **Attachment Type**: Select an attachment type from the dropdown menu.

3 **Index Source**: Select a document to be used as an index source.

4 **Parties to View:** Select one or more parties to have them view the file during the signing and reviewing process.

2 To scan the file, click **Scan**.

3 Once scanning is done, the uploaded file is listed in the Selected Documents section.

When you are done adding documents, click **Process** to process the files and to return to the Session Details page.
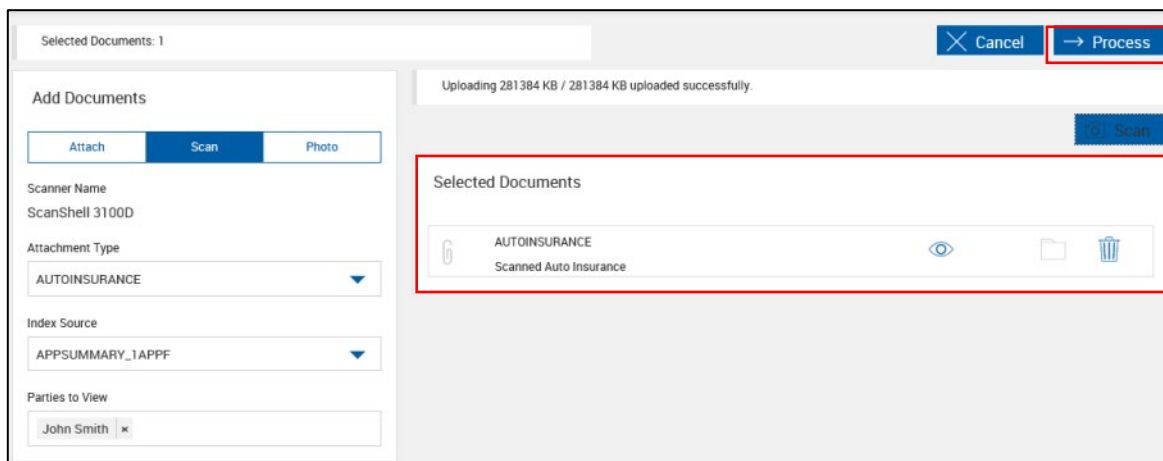
To change or set your scanner settings, refer to **Workstation Scanner Settings** on page **182** for more information.

Taking a Photograph

To take a photograph for this session, follow these steps:

**1** Click **Photo** and select the desired values for each field.
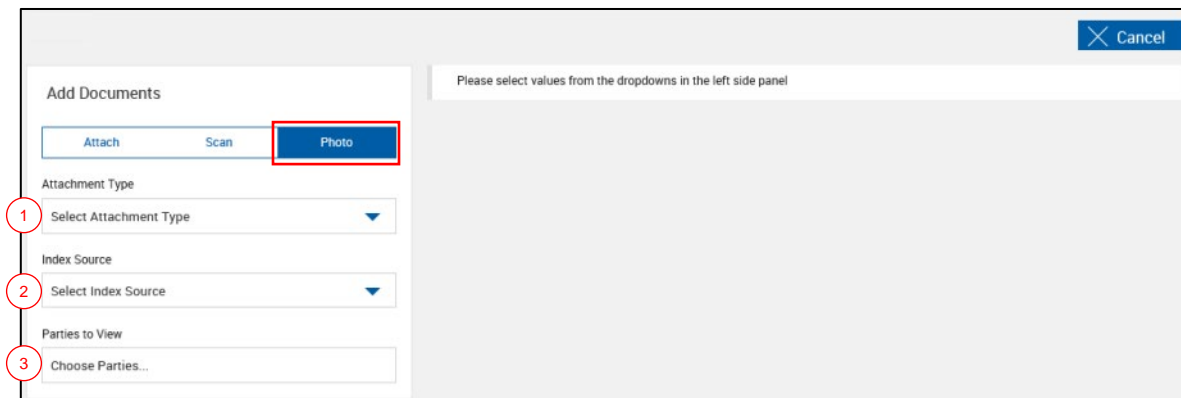
1 **Attachment Type**: Select an attachment type from the dropdown menu.

2 **Index Source**: Select a document to be used as an index source.

3 **Parties to View:** Select one or more parties to have them view the file during the signing and reviewing process.

2   Once the values are entered in the fields, the camera becomes available.
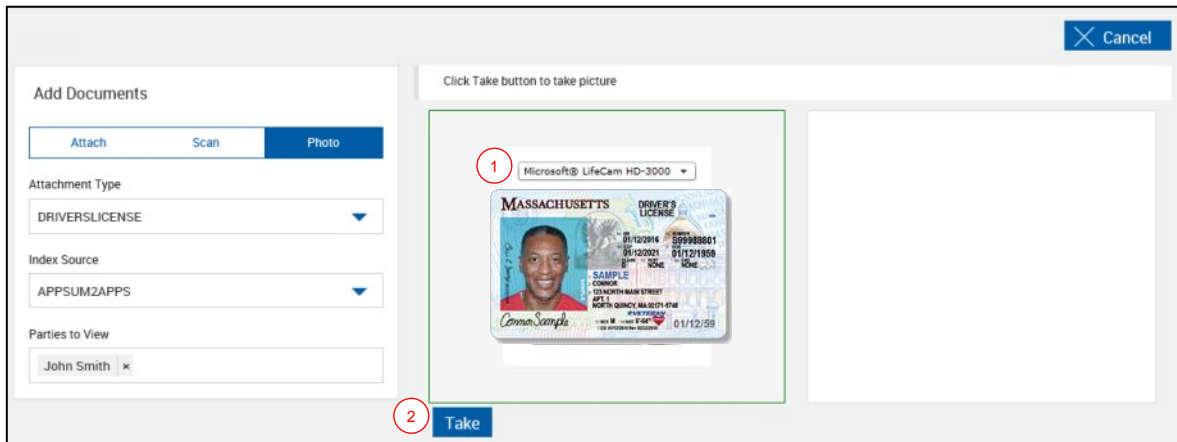
1   Select a camera from the dropdown menu.

2   Click **Take** to take the photograph.

3   The photograph appears.
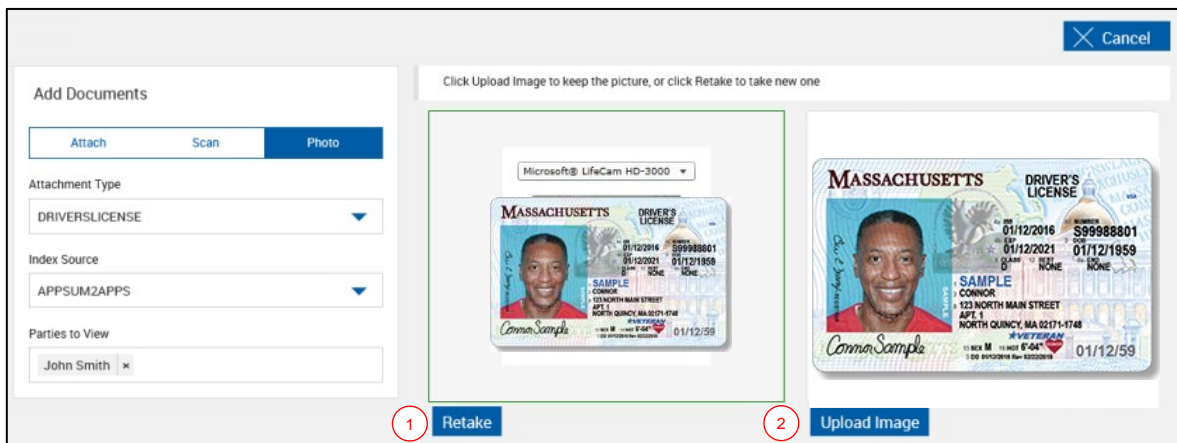
1   Click Retake to take another photograph.

2   Click Upload Image to add the photograph to the document set.

4 When the photograph is uploaded, it appears in the Selected Documents list.
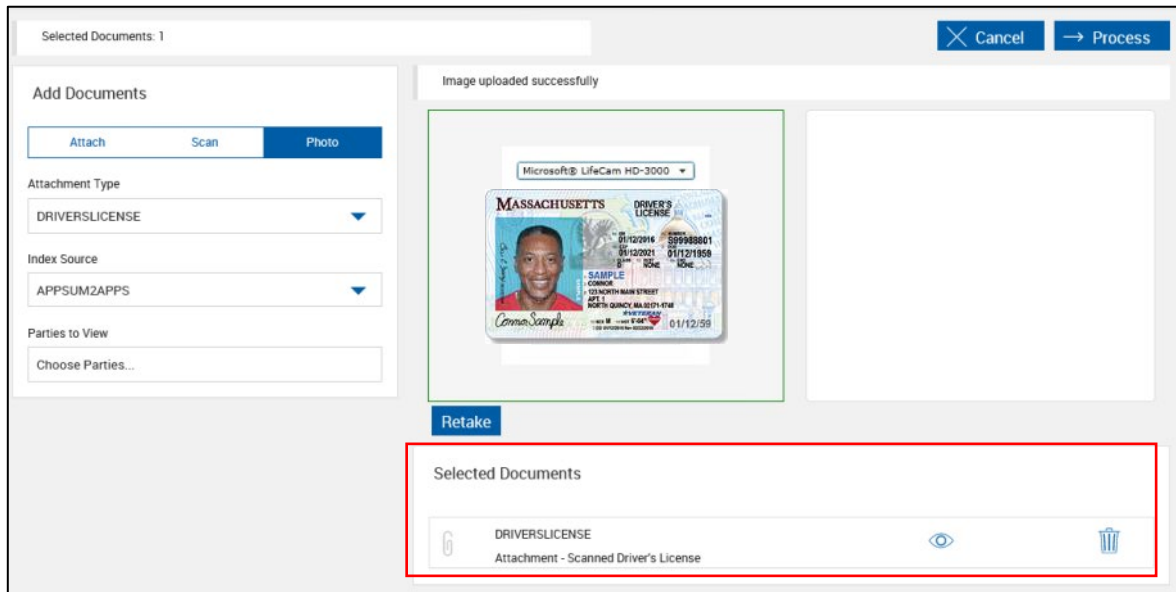
If another photograph is needed, adjust the fields as necessary and use the **Retake** button to take another photograph.

When you are done adding documents, click **Process** to process the files and to return to the Session Details page.

Adding Documents Using an iPad

When using an iPad, you have the ability to attach documents and add documents from the library (XML only).
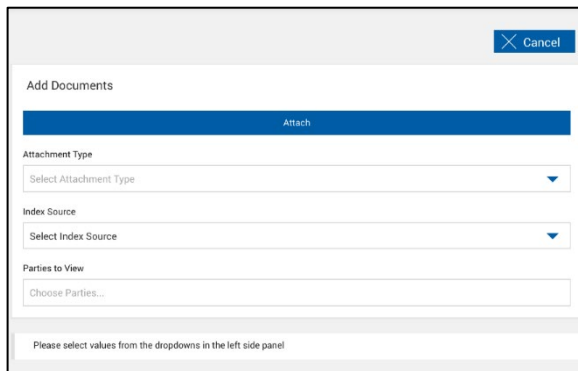
RTS Integrations   XML Integrations
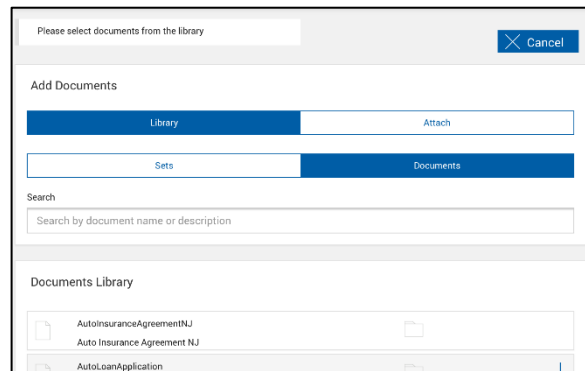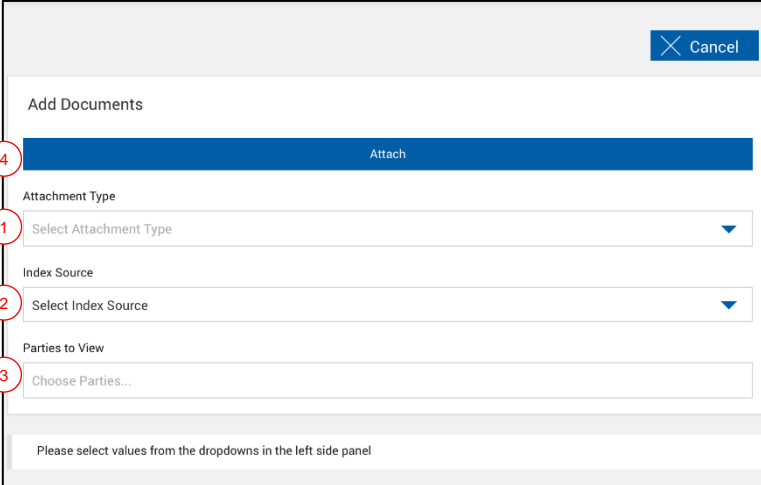
To add documents from the library, refer to **Adding Documents from the Library** on page **63** for details.

To attach documents, refer to the following procedure.

> ℹ️ The example screenshots in this section are based on RTS sessions.

1 On the Add Documents page, select the desired values for each field, and then click **Attach**.

1 **Attachment Type**: Select an attachment type from the dropdown menu.

2 **Index Source**: For RTS sessions, select a document to be used as an index source (shown). For XML sessions, select a party to use as an index source.

3 **Parties to View**: Select one or more parties to have them view the file during the signing and reviewing process.

4 **Attach**: Click this button once the desired values for each field have been selected.

2 To attach the file, perform one of the following actions:

- Drag and drop the file from the file location into the **Drop files here or click to select file** box.

- Click the **Drop files here or click to select file** box to navigate to the file and select it.

- Click the **Drop files here or click to select file** to take a picture using the iPad.

3 The file is uploaded automatically. The uploaded file is listed in the Selected Documents section.

When you are done adding documents, click **Process** to process the files and to return to the Session Details page.

Routing Documents

1   Click the **Route** button to route the case to the next step. The Document Routing popup is displayed.


2   Select a workflow response from the **Response** drop-down menu.

3   Select **Important** to mark the case as important. All cases marked as important must have a comment entered in the **Comments** field.

4   Enter a comment in the **Comments** field. All cases marked as important must have a comment. Otherwise, this field is optional. The first 80 characters of these comments are added to the case's audit report in the entry associated with document routing.

5   Click **Submit** to route the document set. The Cases page is displayed. Refer to **Cases (eSign plus)** on page **166** for detailed information about the Cases page.

Signing Documents

> ℹ️ Signature methods available and the default signature method are set by the Administrator.
>
> For PC-touch capable devices, do not use the signature pad in-person signing method.
>
> For ViewSonic, Wacom, and Topaz GemView displays, use the in-person draw method.
>
> The signature pads shown in this section are examples only. Your signature pad will be different.
>
> The examples in this section have both signatures and initials.
>
> Not available for eSign Lite installations.

To initiate document signing, click the **Sign** button on the Session Details page. The eSignature Management page is displayed. Refer to **eSignature Management** on page **158** for an overview of the eSignature Management page.

> ℹ️ When unmapped or optional fields are detected, you are rerouted to the Document Designer page instead of the eSignature Management page.

This section provides an overview of the following information:

Merging Signers

In-Person Signing

In-Person Viewing

Remote Signing

Merging Signers (RTS Only)

If there are two or more duplicate signers shown on the eSignature Management page, the names and documents of the signers can be merged. The merge functionality is not available if the documents are already signed. Perform the following procedure to merge signers.

1   On the eSignature Management page, click the **Merge Party Names** icon next to the name that you would like to use to represent the signer after merging is complete.
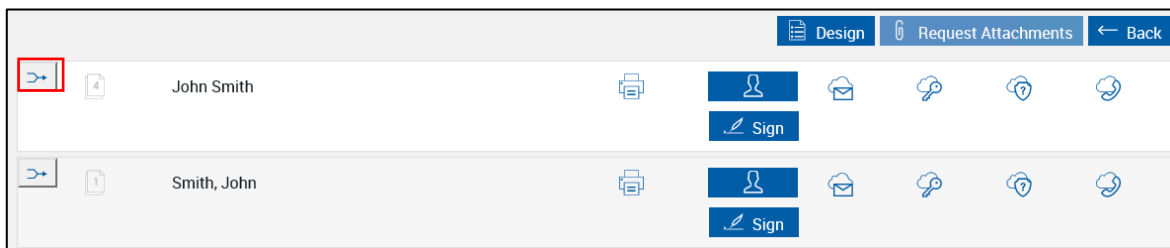
2   Click the **Merge Party Names** icon next to the names that you would like merged with the name that you selected in Step 1.

3   Once the names are selected, click **Merge** next to the name you would like to keep.

Click **Cancel** to undo all merge selections.

4   The eSignature Management page refreshes and all of the selected names are merged into one signer.

In-Person Signing

IMM eSign 2018.1 provides a simple, guided process to sign and view documents in person. Instead of signing in each signature field in each document, the signer creates a signature that is used throughout the entire signing process. Once the signature is created, the signer must accept the signature to confirm his or her intent to sign. Then, the signer is guided to each signature field where the signature can be applied with an easy click or tap.

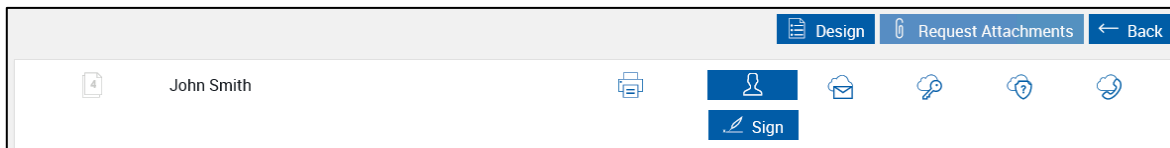In addition, specific documents and attachments within a document set can be assigned to a party so that the party can view and approve them without the need for signatures or data entry. Parties can be assigned to sign, sign and view, or view certain documents within a document set.

To initiate the in-person signing and viewing process on the eSignature Management page, the financial institution representative clicks **Sign** or **Start**:

- When a party has documents to sign or when a party has documents to sign and documents to view, the **Sign** button is displayed.

- When a party only has documents to view, the **Start** button is displayed. Refer to **In-Person Viewing** for details.
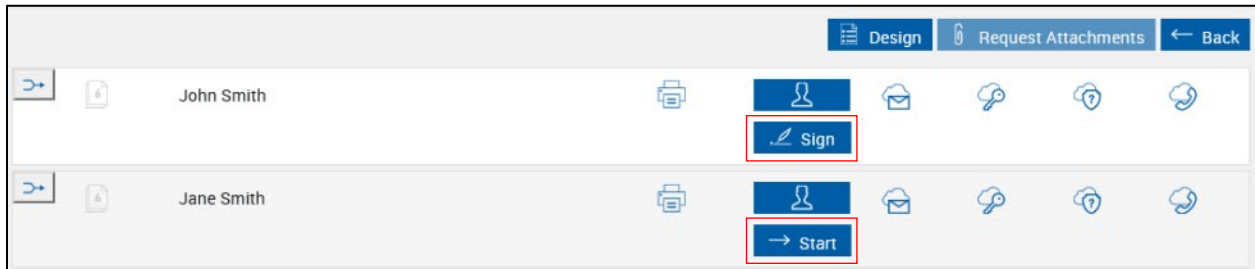
When signing in person, signatures can be created using a signature pad, by typing, or by drawing as follows:

Signature Pad with Messages

Signature Pad without Messages

Type

Draw

Signature Pad with Messages

In-person signing with the signature pad is available for traditional PCs and touch PCs. Signature pads display messages on the screen to improve usability and to support self-guided signing.

Financial institution (FI) representatives start the signing process while the signers use a signature pad to create a signature, accept terms, apply the signature throughout the document set, and confirm completion of the signing process.
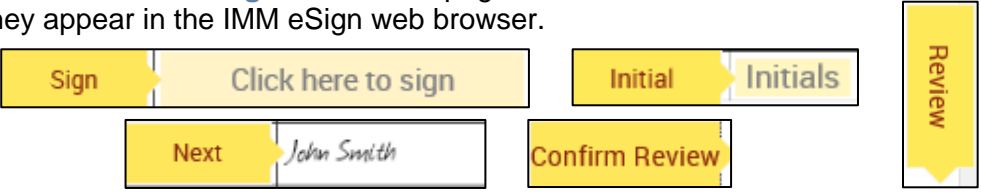
This is a summary of how terms are reviewed, signatures and initials are created, signatures and initials are applied, and signatures/initials/review are confirmed:

1. The FI representative reviews the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer.

2. The FI representative clicks **Start** below the Signature box. The signature pad displays "Please Sign Below." The signer signs the signature pad and selects **OK**.

3. The FI representative clicks **Start** below the Initials box. The signature pad displays "Please Initial Below." The signer initials the signature pad and selects **OK**.

4. The FI representative clicks **Continue**. The signature pad displays "I have reviewed the provided Disclosure and Consent and agree to the Terms of Use." The signer selects **Accept**.

5. Once the signature and the initials are created and the Disclosure and Consent and the Terms of Use are accepted, the first document that requires a signature is displayed in the IMM eSign web browser. The signature pad does not display the documents. For the signer to see the documents, the signer must see the IMM eSign web browser.

6. The signer selects **Sign**, **Initial**, **or Review** when prompted by the signature pad to apply his or her signature or initials or to confirm that he or she viewed the document (e.g., "I hereby sign *DOCUMENTNAME*."). The signer is automatically moved to the next field. The signer continues to select **Sign**, **Initial**, or **Review** on the signature pad until the document set is completely signed.

> **STOP** If the IMM eSign web browser displays **Next**, **Sign**/**Click Here to Sign**, **Initial**/**Initials**, or **Review**/**Confirm Review** buttons that you must click before the signer can apply signatures/initials or confirm review on the signature pad, contact your administrator. Examples of the buttons are shown below. The recommended Signature Pad Administration eSignature settings are outlined in the financial institution administrator's guide.
>
> The buttons are not displayed in this section because they are not recommended when using the signature pad with messages. When these buttons are disabled as recommended, additional unnecessary clicks are eliminated. The buttons are ideal for scenarios where signers are using mobile devices like tablets.
>
> If the **Next**, **Sign**/**Click Here to Sign**, **Initial**/**Initials, and Review**/**Confirm Review** buttons are desired, refer to the detailed procedure in the **Signature Pad without Messages** section on page **91** to view the buttons as they appear in the IMM eSign web browser.

7. When the document set is complete, the signature pad displays "I confirm that I have applied my signatures and have completed the signing process." The signer selects **Confirm Signatures**. The signer is done. The IMM eSign web browser returns to the eSignature Management page.

8. Repeat this self-guided process until all of the signers have signed all of the documents.

Refer to the following procedure for details on in-person signing with signature pads that display messages:

1 After clicking **Sign** from the eSignature Management page, the Welcome page is displayed. The name and initials are automatically populated. The examples in this guide have both signatures and initials.

Welcome John Smith

To electronically sign your documents, there are three things you need to do:
1. Agree to the disclosure below
2. Allow us to capture your signature
3. Sign your documents and approve them on the next page

Review the Disclosure and Consent to Use of Electronic Signatures and Records

Sample Disclosure and Consent to the Use of Electronic Signatures and Records
This is a sample only - each system user is responsible for determining the appropriate content for an ESIGN Consent Disclosure applicable to the system-user's business. The system user should consult its own counsel to prepare the ESIGN Consent Disclosure and approve its contents for legal sufficiency.

Please read this Disclosure and Consent to the Use of Electronic Signatures and Records ("Disclosure") carefully, it contains important information. In this disclosure, "we", "us" and "our" are used to refer to the financial institution providing the service or account you are applying for, and its current and future affiliates. "You" and "your" refer to the person giving this consent.

Please click here for full disclosure   🖶 Print

Select how you would like us to capture your signature

| ✍ Signature Pad | ⌨ Type | ✋ Draw |
| Sign your name using a signature pad | Type your name using the keyboard | Use your finger or mouse |

Your Name   Initials
John Smith   JS

Signature   Initials   📷 Add Photo

✓ Start   ✓ Start

→ Continue   ✕ Decline

1 Review the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer. You may print the disclosure and consent agreement by clicking the Print button, or simply read it by using the scroll bar.

2 Verify **Signature Pad** is selected. Your Name and Initials fields are automatically populated from party information in the documents. Modify as necessary.

3 Click **Start** below the Signature box and direct the signer's attention to the signature pad.

2   The signature pad displays "Please Sign Below."
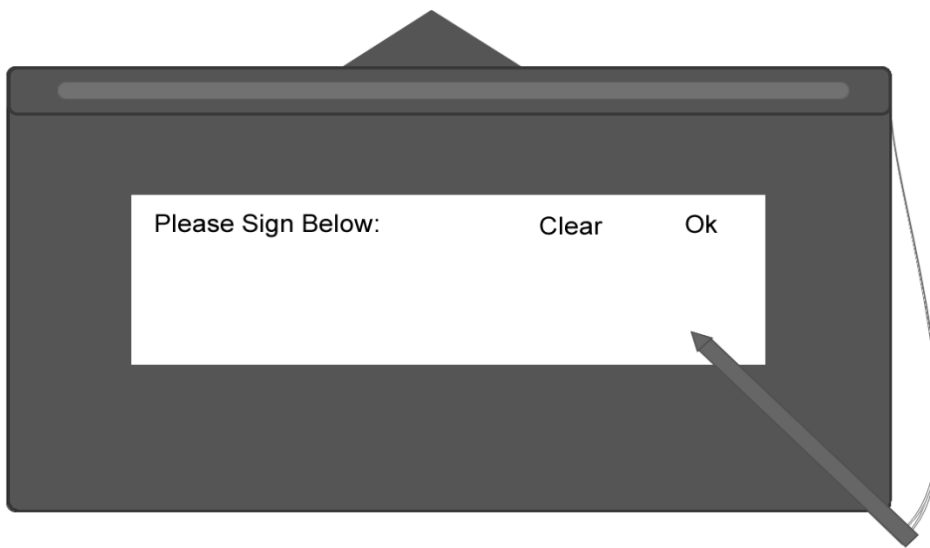
Direct the signer to use the signature pad to create a signature. Then, the signer must either select **Clear** or **Ok**:

- The signer selects **Clear** to remove the signature. The signer must sign again.

- The signer selects **Ok** to accept the signature. After selecting **Ok**, it may take a few seconds for the signature to process.

3

1. On the Welcome page, the signature is displayed in the **Signature** box.

2. The Signature **Start** button is replaced with **Clear** when the signature is processed.

3. Click **Start** below the Initials box and direct the signer's attention to the signature pad.

4   The signature pad displays "Please Initial Below."

Direct the signer to initial the signature pad. Then, the signer must either select **Clear** or **Ok**:

- The signer selects **Clear** to remove the initials. The signer must initial again.

- The signer selects **Ok** to accept the initials. After selecting **Ok**, it may take a few seconds for the initials to process.

5   1   On the Welcome page, the initials display in the **Initials** box.

2   The Initials **Start** button is replaced with **Clear** when the initials are processed.

3   A photo can be added at this point in the signing process. To add a photo refer to **Adding a Photo** on page 115 for more information.

4   Click **Continue** and direct the signer's attention to the signature pad.

6   The signature pad displays "I have reviewed the provided Disclosure and Consent and agree to the Terms of Use."

Direct the signer to select either **Accept** or **Decline** on the signature pad:

- The signer selects **Accept** to use the signature, initials, and/or photo.

- The signer selects **Decline** to stop this transaction. The Declining Terms popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Decline Terms** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Terms**.

7 When the signature and initials have been accepted, the first document that requires signing is displayed on the IMM eSign web browser. Direct the signer's attention to the signature pad.

Documents that require signatures or review confirmation are listed below the signer name. When a document is selected from the list, it will display in Preview mode. If a document is selected from the list, return to Signing mode by clicking the field in the document where the next signature is required.

1   The IMM eSign web browser automatically navigates to each signature, initials, and review field that requires a signature or initials mark or review confirmation. Before the signer applies the signature or initials mark or review confirmation using the signature pad, the field displayed in the IMM eSign web browser contains the message "Please wait." Once the signer applies the signature or initials mark or review confirmation on the signature pad, the next signature, initials, or review field that requires a mark is displayed in the IMM eSign web browser with the message "Please wait." This continues until the process is complete.

2   **Print Unsigned** allows you to print a copy of this document without signatures.

3   **Cancel** exits signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

8   For signatures, the signature pad displays "I hereby sign *DOCUMENTNAME*."

For initials, the signature pad displays "I hereby initial *DOCUMENTNAME*."

For review confirmation, the signature pad displays "I hereby reviewed *DOCUMENTNAME*."

DOCUMENTNAME will be replaced by the actual name of the document being signed.
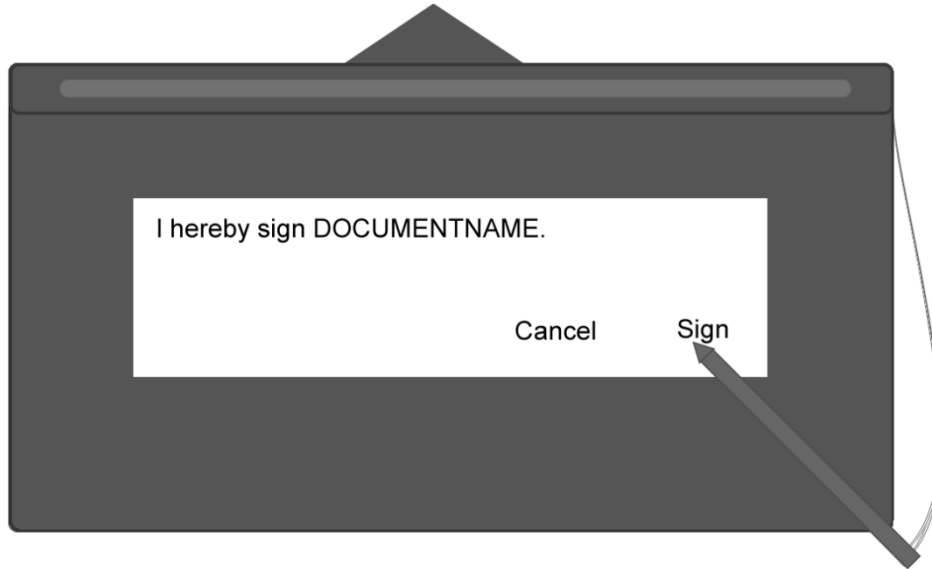
Direct the signer to select **Sign**, **Initial**, **Review**, or **Cancel** on the signature pad:

- The signer selects **Sign** to apply the signature, **Initial** to apply initials, or **Review** to confirm review.

- The signer selects **Cancel** to exit signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

The signer continues to apply his or her signatures and initials or confirm review using the signature pad until all of the documents have been signed.

To view the applied signatures or initials, locate the field in the IMM eSign web browser using the scroll bar and the list of documents on the left side of the page. Refer to the following example of an applied signature and applied initials.

9 When the signer is done signing all of the documents, the message "You have signed all documents. Click the Confirm Signatures and Finish button." is displayed on the IMM eSign web browser.

Direct the signer's attention to the signature pad.

10 The signature pad displays "I confirm that I have applied my signatures and have completed the signing process."
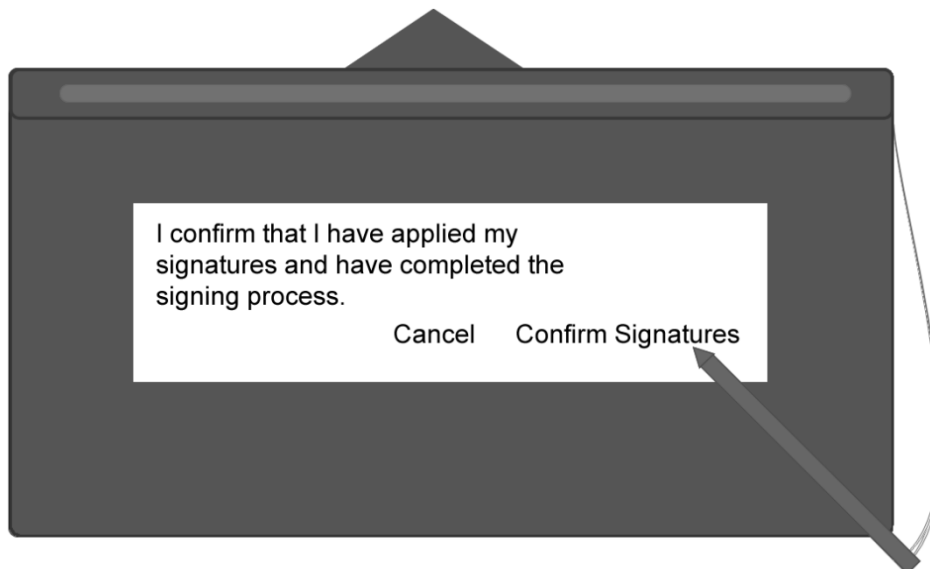
Direct the signer to select **Confirm Signatures** or **Cancel** on the signature pad:

- The signer selects **Confirm Signatures** to apply the signatures.

- The signer selects **Cancel** to exit signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

11 On the IMM eSign web browser, you are returned to the **eSignature Management** page. Repeat this process as necessary until all of the documents have been signed by all of the signers.

After all documents in the session have been signed/viewed by all parties in-person, click **Delivery** to send the documents securely to all of the signing/viewing parties. Refer to **Secure Email Delivery** on page **161** for more details.

> ℹ The **Delivery** button is only available if the parties are signing/viewing in-person.

Click **Continue** to return to the Session Details page.

Signature Pad without Messages

In-person signing with the signature pad is available for traditional PCs and touch PCs. The procedure in this section is for financial institution representatives who are guiding signers through the signing process. FI representatives control the signing process while the signers use a signature pad to create a signature. Unlike the **Signature Pad with Messages** process, the signature pads in this procedure do not display messages. The signature pads are only used to create signatures and initials.

This is a summary of how terms are reviewed, signatures and initials are created, signatures and initials are applied, and signatures/initials/review are confirmed:

1. The FI representative reviews the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer.

2. The FI representative clicks **Start** below the Signature box, and then the signer signs the signature pad.

3. The FI representative clicks **Start** below the Initials box, and then the signer initials the signature pad.

4. The FI representative clicks **Accept** if the signer agrees to the Disclosure and Consent and Terms of Use.

5. Once the signature and the initials are created, the first document that requires a signature is displayed on the IMM eSign web browser. The signature pad does not display the documents. For the signer to see the documents, the signer must see the IMM eSign web browser.

   > *i*   It is recommended to give the signer control of the IMM eSign web browser to apply his or her signatures and initials.

6. The signer clicks **Sign** or **Click Here to Sign** (or **Initial/Initials**) on the IMM eSign browser to apply the signer's signature or initials. The signer clicks **Review** and/or **Confirm Review** on the IMM eSign browser to confirm that he or she viewed the document. Once applied, the **Next** button appears.

7. The signer clicks **Next** on the IMM eSign browser to move to the next field.

8. The signer repeats steps 6 and 7 as necessary until the IMM eSign web browser displays "You have signed all documents."

9. The signer clicks **Confirm your Signatures** or **Confirm Signatures and Finish** on the IMM eSign browser. The signer is done. The IMM eSign web browser returns to the eSignature Management page.

10. Repeat this process until all of the signers have signed all of the documents.

Refer to the following procedure for details on in-person signing with signature pads:

1 After clicking **Sign** from the eSignature Management page, the Welcome page is displayed. The name and initials are automatically populated. The examples in this guide have both signatures and initials.

1 Review the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer. You may print the disclosure and consent agreement by clicking the Print button, or simply read it by using the scroll bar.

2 Click **Signature Pad**. Clicking **Signature Pad** will clear the Signature and Initials blocks.

3 Click **Start** below the Signature box and direct the signer's attention to the signature pad.

2   Direct the signer to sign the signature pad.

3

1 On Welcome page, the signature is displayed in the **Signature** box.

2 The Signature **Start** button is replaced with **Clear** when the signature is processed.

3 Click **Start** below the Initials box and direct the signer's attention to the signature pad.

4   Direct the signer to initial the signature pad.

5

1   On the Welcome page, the initials display in the **Initials** box.

2   The Initials **Start** button is replaced with **Clear** when the initials are processed.

3   A photo can be added at this point in the signing process. To add a photo refer to **Adding a Photo** on page 115 for more information.

4   Click outside the box to enable the **Accept** button. Click **Accept** to use the signature, initials, and/or photo and to continue with the signing process. Click **Decline** to stop this transaction. The Declining Terms popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Decline Terms** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Terms**.

6 When the signature and initials have been accepted, the first document that requires signing is displayed on the IMM eSign web browser.

Documents that require signatures or review confirmation are listed below the signer name. When a document is selected from the list, it will display in Preview mode. If a document is selected from the list, return to Signing mode by clicking the field in the document where the next signature is required.

1 **Print Unsigned** allows you to print a copy of this document without signatures.

2 **Cancel** exits signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

7 The signer clicks **Sign** or **Click here to sign** for signatures, **Initial** or **Initials** for initials, and **Review** and/or **Confirm Review** for review confirmation on the IMM eSign browser.

8 If more signatures are required, the signer clicks **Next** on the IMM eSign browser. The signing prompt moves to the next field. The signer repeats steps 7 and 8 until all documents have been completely signed.

9 When the signer is done signing all of the documents, the message "You have signed all documents. Click the Confirm Signatures and Finish button." is displayed on the IMM eSign web browser. The signer clicks **Confirm your Signatures** or **Confirm Signatures and Finish** on the IMM eSign browser.

10 You are returned to the **eSignature Management** page. Repeat this process as necessary until all of the documents have been signed by all of the signers.

After all documents in the session have been signed/viewed by all parties in-person, click **Delivery** to send the documents securely to all of the signing/viewing parties. Refer to **Secure Email Delivery** on page **161** for more details.

> ℹ The **Delivery** button is only available if the parties are signing/viewing in-person.

Click **Continue** to return to the Session Details page.

Type

In-person signing with the type method is available for PCs and iPads. Type is the default signing method. The procedure in this section is for financial institution representatives who are guiding signers through the signing process.

This is a summary of how terms are reviewed, signatures and initials are created, signatures and initials are applied, and signatures/initials/review are confirmed:

1. The FI representative reviews the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer.

2. If the signer approves the prepopulated signature and initials fields, the FI representative clicks **Accept**. If the name or initials need to be modified, retype them, and then click **Accept**.

3. Once the signature and the initials are created, the first document that requires a signature or review confirmation is displayed on the IMM eSign web browser.

   > *i* It is recommended to give the signer control of the IMM eSign web browser to apply his or her signatures and initials.

4. The signer clicks **Sign** or **Click Here to Sign** (or **Initial/Initials**) to apply the signer's signature or initials. The signer clicks **Review** and/or **Confirm Review** on the IMM eSign browser to confirm that he or she viewed the document. Once applied, the **Next** button appears.

5. The signer clicks **Next** to move to the next field.

6. The signer repeats steps 4 and 5 as necessary until the IMM eSign web browser displays "You have signed all documents. Click the Confirm Signatures and Finish button."

7. The signer clicks **Confirm your Signatures** or **Confirm Signatures and Finish**. The signer is done. The IMM eSign web browser returns to the eSignature Management page.

8. Repeat this process until all of the signers have signed all of the documents.

Refer to the following procedure for details on in-person signing using the type method:

1 After clicking **Sign** from the eSignature Management page, the Welcome page is displayed. The name and initials are automatically populated. The examples in this guide have both signatures and initials.

1 Review the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer. You may print the disclosure and consent agreement by clicking the Print button, or simply read it by using the scroll bar.

2 Select **Type**. When Type is the default signing method (as set by the Administrator), the Type button is preselected.

3 **Your Name** and **Initials** are automatically populated from party information in the documents. Modify as necessary.

4 When the **Name** and **Initials** have been approved, click **Add Photo** to add a photo of the Signer. Refer to **Adding a Photo** on page 115 for more information.

5 Click **Accept** to use the Signature, Initials, and/or Photo. Continue with the next step.

Click **Decline** to stop this transaction. The Declining Terms popup is displayed. Click **Decline Terms** to decline the terms and return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for declining. To continue signing the document, click **Return to Terms**.

2 When the signature and initials have been accepted, the first document that requires signing is displayed.

Documents that require signatures or review confirmation are listed below the signer name. When a document is selected from the list, it will display in Preview mode. If a document is selected from the list, return to Signing mode by clicking the field in the document where the next signature is required.

1 **Print Unsigned** allows you to print a copy of this document without signatures.

2 **Cancel** exits signing. The Cancelling Document Signing popup is displayed. Click **Cancel Signing** to discontinue signing the document and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue signing the document, click **Return to Signing**.

3   The signer clicks **Sign** or **Click here to sign** for signatures, **Initial** or **Initials** for initials, and **Review** and/or **Confirm Review** for review confirmation.

4   The signature is displayed in the document.

The signer clicks **Next**. The signing prompt moves to the next field.

5 The signer repeats steps 3 and 4 until all documents have been completely signed and reviewed.

When the signer is done signing and reviewing all of the documents, the message "You have signed all documents. Click the Confirm Signatures and Finish button." is displayed on the IMM eSign web browser.

The signer clicks **Confirm your Signatures** or **Confirm Signatures and Finish** on the IMM eSign browser.
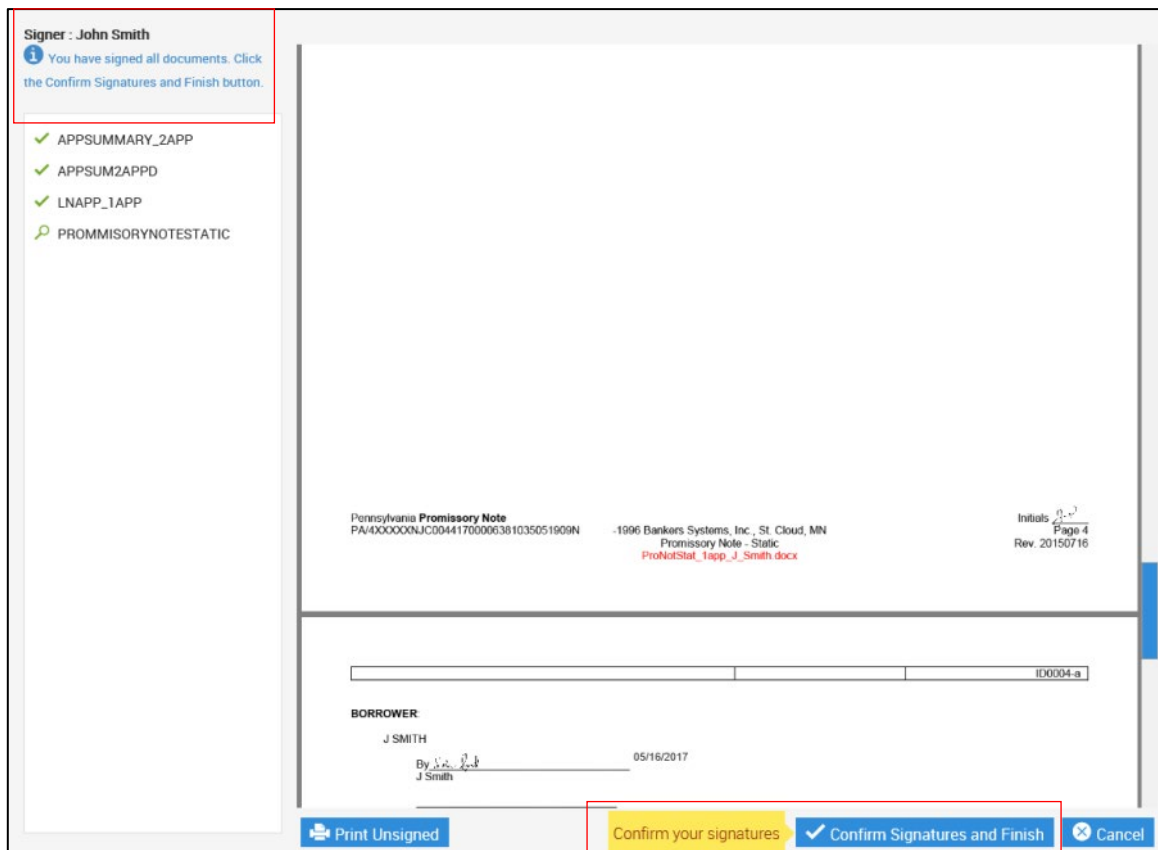
6 You are returned to the **eSignature Management** page. Repeat this process as necessary until all of the documents have been signed by all of the signers.

After all documents in the session have been signed/viewed by all parties in-person, click **Delivery** to send the documents securely to all of the signing/viewing parties. Refer to **Secure Email Delivery** on page **161** for more details.

> The **Delivery** button is only available if the parties are signing/viewing in-person.

Click **Continue** to return to the Session Details page.

Draw

In-person signing with the draw method is available for PCs, iPads, and ViewSonic and Wacom displays. If using Wacom or ViewSonic displays, you have the ability to slide the interface between monitors as needed when your monitors are set to extended display.

This PC-touch capable feature gives signers as much control as your financial institution desires, such as the ability to create signatures, confirm intent to sign, and apply signatures, while you easily maintain control of the overall signing process from your own monitor. The procedure in this section applies to the party that is operating the IMM eSign web browser (the FI representative or the signer) during that particular step.

> **i** Certain Wacom displays are supported. Use a Wacom display as an extended monitor to enhance the in-person document viewing and signing experience. Move the eSign browser back and forth between the operator's primary monitor and the Wacom display by dragging and dropping the browser while in extended monitor mode. Alternatively, purchase a third-party tool for configuring keyboard shortcuts, such as UltraMon (https://www.realtimesoft.com/ultramon/), to move the eSign browser back and forth between the operator's primary monitor and the Wacom display. Before use, confirm that the Wacom display is using the latest drivers found on the Wacom website: http://www.wacom.com/en-us/support/product-support/drivers. Wacom displays are not compatible with DisplayLink drivers.
>
> Refer to the following suggested model of how to use a Wacom display:
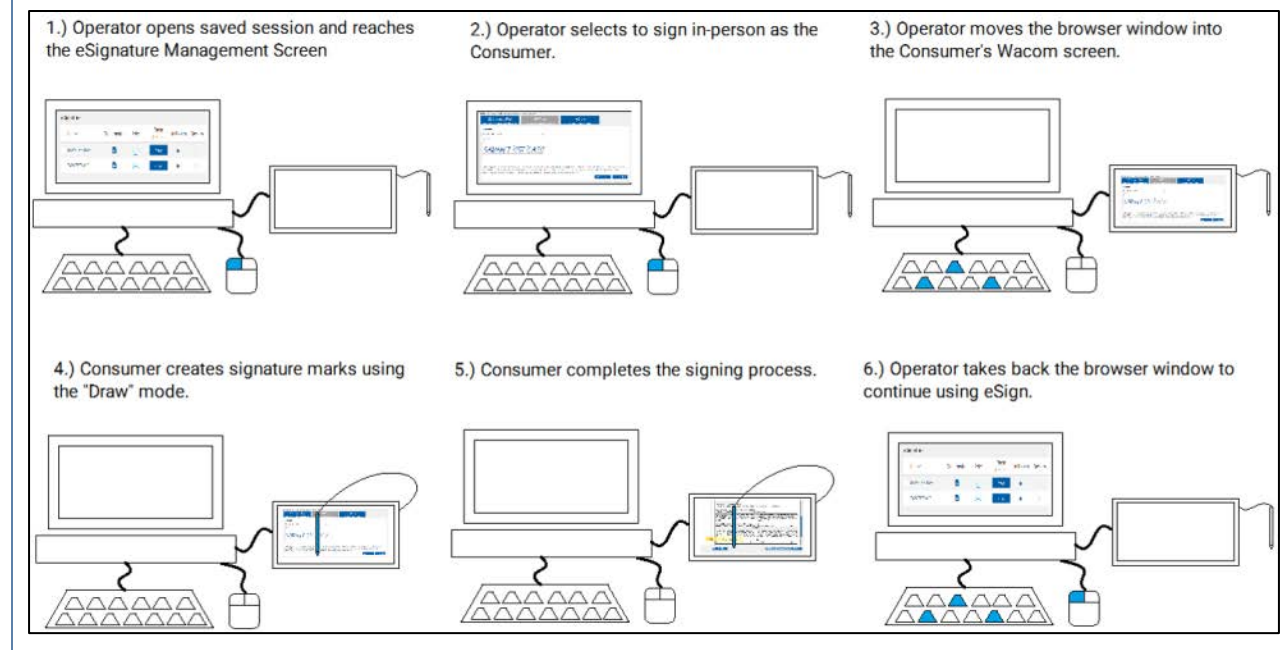
> **i** Verify that the driver software that comes with the monitors is installed prior to using IMM eSign.

This is a summary of how terms are reviewed, signatures and initials are created, signatures and initials are applied, and signatures/initials/review are confirmed:

1. The FI representative reviews the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer.

> ℹ️ It is recommended to give the signer control of the IMM eSign web browser to create and apply his or her signatures and initials.

2. The signer draws his or her signature and initials in the Signature and Initials fields.

3. The signer clicks **Accept** if the signer agrees to the Disclosure and Consent and Terms of Use.

4. Once the signature and the initials are created, the first document that requires a signature or review confirmation is displayed on the IMM eSign web browser.

5. The signer clicks **Sign** or **Click Here to Sign** (or **Initial/Initials**) to apply the signer's signature or initials. The signer clicks **Review** and/or **Confirm Review** on the IMM eSign browser to confirm that he or she viewed the document. Once applied, the **Next** button appears.

6. The signer clicks **Next** to move to the next field.

7. The signer repeats steps 5 and 6 as necessary until the IMM eSign web browser displays "You have signed all documents."

8. The signer clicks **Confirm your Signatures** or **Confirm Signatures and Finish**. The signer is done. The IMM eSign web browser returns to the eSignature Management page.

9. Repeat this process until all of the signers have signed all of the documents.

Refer to the following procedure for details on in-person signing using the draw method:

1 After clicking **Sign** from the eSignature Management page, the Welcome page is displayed. The name and initials are automatically populated. The examples in this guide have both signatures and initials.

Welcome John Smith

To electronically sign your documents, there are three things you need to do:
1. Agree to the disclosure below
2. Allow us to capture your signature
3. Sign your documents and approve them on the next page

Review the Disclosure and Consent to Use of Electronic Signatures and Records

Sample Disclosure and Consent to the Use of Electronic Signatures and Records
This is a sample only - each system user is responsible for determining the appropriate content for an ESIGN Consent Disclosure applicable to the system-user's business. The system user should consult its own counsel to prepare the ESIGN Consent Disclosure and approve its contents for legal sufficiency.

Please read this Disclosure and Consent to the Use of Electronic Signatures and Records ("Disclosure") carefully, it contains important information. In this disclosure, "we", "us" and "our" are used to refer to the financial institution providing the service or account you are applying for, and its current and future affiliates. "You" and "your" refer to the person giving this consent.

Please click here for full disclosure   Print

Select how you would like us to capture your signature

| Signature Pad | Type | Draw |
| Sign your name using a signature pad | Type your name using the keyboard | Use your finger or mouse |

Your Name   Initials
John Smith   JS

Signature   Initials   Add Photo

Clear   Clear

By creating your electronic signature in the space provided above and clicking the "Accept" button you are consenting to use electronic records and signatures in connection with this transaction, confirming your name and initials displayed above are correct and that you have received the disclosure and consent. Your electronic signature will be just as enforceable as signing the same document using a handwritten signature.

√ Accept   × Decline

1   Review the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer. You may print the disclosure and consent agreement by clicking the Print button, or simply read it by using the scroll bar.

2   Verify **Draw** is selected.

3   Direct the signer to draw a signature and initials. Click **Clear** to clear the signature or initials and sign or initial again.

4   Click **Add Photo** to add a photo of the Signer. Refer to **Adding a Photo** on page 115 for more information.

2 Direct the signer to click **Accept** to use the signature, initials, and/or photo.

The signer clicks **Decline** to stop this transaction. The Declining Terms popup is displayed. Click **Decline Terms** to decline the terms and return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for declining. To continue signing the document, click **Return to Terms**.

3 When the signature and initials have been accepted, the first document that requires signing/reviewing is displayed.

Documents that require signatures or review confirmation are listed below the signer name. When a document is selected from the list, it will display in Preview mode. If a document is selected from the list, return to Signing mode by clicking the field in the document where the next signature is required.

1 **Print Unsigned** allows you to print a copy of this document without signatures.

2 **Cancel** exits signing. The Cancelling Document Signing popup is displayed. Click **Cancel Signing** to discontinue signing the document and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue signing the document, click **Return to Signing**.

4 The signer clicks **Sign** or **Click here to sign** for signatures, **Initial** or **Initials** for initials, and **Review** and/or **Confirm Review** for review confirmation.

5   The signature is displayed in the document. The signer clicks **Next**. The signing prompt moves to the next field.

6 The signer repeats steps 4 and 5 until all documents have been completely signed and reviewed.

When the signer is done signing and reviewing all of the documents, the message "You have signed all documents. Click the Confirm Signatures and Finish button." is displayed on the IMM eSign web browser.

The signer clicks **Confirm your Signatures** or **Confirm Signatures and Finish** on the IMM eSign browser.

7 You are returned to the **eSignature Management** page. Repeat this process as necessary until all of the documents have been signed by all of the signers.

After all documents in the session have been signed/viewed by all parties in-person, click **Delivery** to send the documents securely to all of the signing/viewing parties. Refer to **Secure Email Delivery** on page **161** for more details.

> The **Delivery** button is only available if the parties are signing/viewing in-person.

Click **Continue** to return to the Session Details page.

Adding a Photo

1	ⓘ	Your workstation must have a camera attached and set up.
		When a photo is captured in the consent page, the photo will appear next to the signature throughout the document.
		No physical file outside of the application can be used.
		The picture automatically resizes in the document.

To add a photo from the Welcome page, click the **Add Photo** button.

2 In the Capture Photo popup, select your camera from the dropdown menu if necessary and click **Take** to capture the photograph.

Click **Cancel** to exit the Capture Photo popup.

3 Once the photograph is captured, click **Use Photo** to use this image or click **Retake** to replace the photo with a new captured image.

If you have chosen **Retake**, the photo box clears and is ready to capture a new photo to your satisfaction.
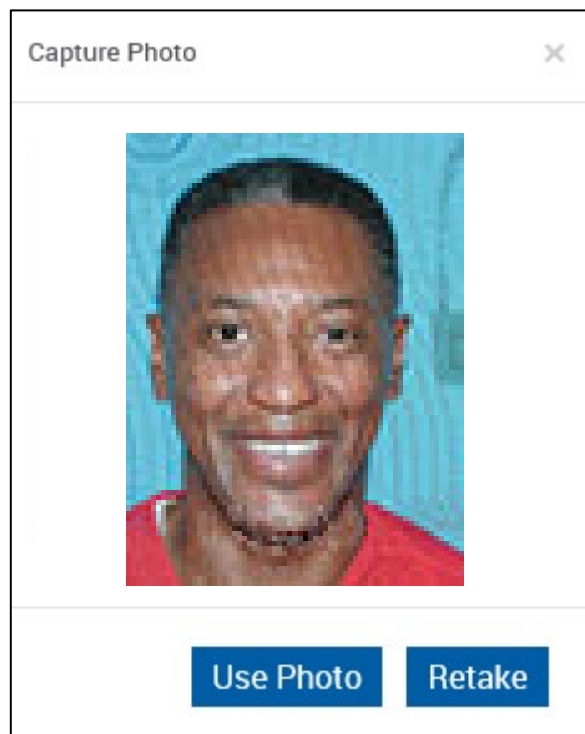
4   The eSignature Management page refreshes with the photo in place of the **Add Photo** button.

Welcome John Smith

To electronically sign your documents, there are three things you need to do:
1. Agree to the disclosure below
2. Allow us to capture your signature
3. Sign your documents and approve them on the next page

Review the Disclosure and Consent to Use of Electronic Signatures and Records

Sample Disclosure and Consent to the Use of Electronic Signatures and Records
This is a sample only - each system user is responsible for determining the appropriate content for an ESIGN Consent Disclosure applicable to the system-user's business. The system user should consult its own counsel to prepare the ESIGN Consent Disclosure and approve its contents for legal sufficiency.

Please read this Disclosure and Consent to the Use of Electronic Signatures and Records ("Disclosure") carefully, it contains important information. In this disclosure, "we", "us" and "our" are used to refer to the financial institution providing the service or account you are applying for, and its current and future affiliates. "You" and "your" refer to the person giving this consent
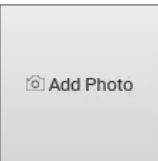
Please click here for full disclosure   🖨 Print

Select how you would like us to capture your signature

| ✍ **Signature Pad**
Sign your name using a signature pad | ⌨ Type
Type your name using the keyboard | 🖱 Draw
Use your finger or mouse |

Your Name   Initials

John Smith   JS

Signature   Initials

John Smith   *JS*

✕ Clear

By creating your electronic signature in the space provided above and clicking the "Accept" button you are consenting to use electronic records and signatures in connection with this transaction, confirming your name and initials displayed above are correct and that you have received the disclosure and consent. Your electronic signature will be just as enforceable as signing the same document using a handwritten signature.

✓ Accept   ✕ Decline

Click **Clear** to remove the picture.

Once the photograph is captured, continue with the signing process as outlined in **In-Person Signing** on page **77**.

In-Person Viewing

Specific documents and attachments within a document set can be assigned to a party so that the party can view and approve them without the need for signatures or data entry.

To initiate the in-person signing and viewing process on the eSignature Management page, the financial institution representative clicks **Sign** or **Start**:

- When a party has documents to sign or when a party has documents to sign and documents to view, the **Sign** button is displayed. Refer to **In-Person Signing** for details.

- When a party only has documents to view, the **Start** button is displayed.
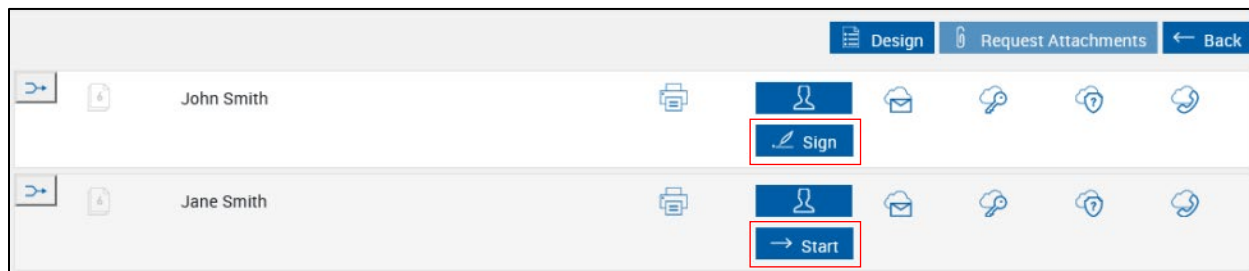
Signature Pad

> If your FI Administrator has disabled messages on the signature pad, follow the In-Person Viewing procedure for the **Type** method of signing.

This is a summary of how terms are reviewed and document review is confirmed:

1. The FI representative reviews the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer.

2. The FI representative clicks **Continue**. The signature pad displays "I have reviewed the provided Disclosure and Consent and agree to the Terms of Use." The signer selects **Accept**.

3. The first document that requires review is displayed in the IMM eSign web browser. The signature pad does not display the documents. For the signer to see the documents, the signer must see the IMM eSign web browser.

4. The signer selects **Review** when prompted by the signature pad to confirm that he or she viewed the document (e.g., "I reviewed *DOCUMENTNAME*."). The signer is automatically moved to the next field. The signer continues to select **Review** on the signature pad until the document set is completely reviewed.

> **STOP** If the IMM eSign web browser displays **Review**/**Confirm Review** buttons that you must click before the signer can confirm review on the signature pad, contact your administrator. Examples of the buttons are shown below. The recommended Signature Pad Administration eSignature settings are outlined in the financial institution administrator's guide.
>
> The buttons are not displayed in this section because they are not recommended when using the signature pad with messages. When these buttons are disabled as recommended, additional unnecessary clicks are eliminated.

5. When the document set is complete, the signature pad displays "I confirm that I have reviewed the document set." The signer selects **Confirm Review**. The signer is done. The IMM eSign web browser returns to the eSignature Management page.

6. Repeat this self-guided process until all of the signers have signed all of the documents.

Refer to the following procedure for details on in-person viewing with signature pads that display messages:

1 After clicking **Start** from the eSignature Management page, the Welcome page is displayed.

1 Review the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer. You may print the disclosure and consent agreement by clicking the **Print** button, or simply read it by using the scroll bar.

2 Select **Signature Pad**.

3 Click **Continue** to review the documents.

Click **Decline** to stop this transaction. The Declining Terms popup is displayed. Click **Decline Terms** to decline the terms and return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for declining. To continue signing the document, click **Return to Terms**.

2   The signature pad displays "I have reviewed the provided Disclosure and Consent and agree to the Terms of Use."

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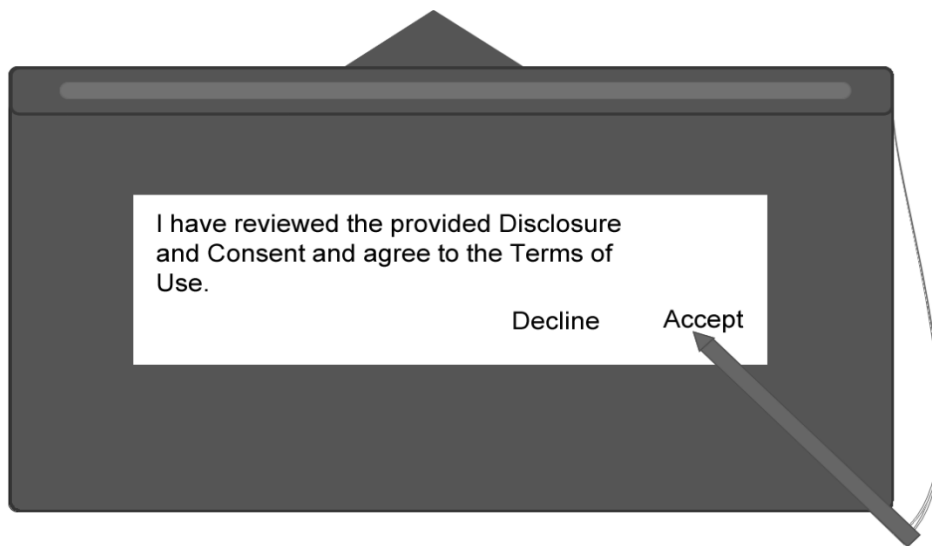
Decline   Accept

Direct the signer to select either **Accept** or **Decline** on the signature pad:

- The signer selects **Accept** to review the documents.

- The signer selects **Decline** to stop this transaction. The Declining Terms popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Decline Terms** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Terms**.

3   When the Disclosure and Consent and agree to the Terms of Use have been accepted, the first document that requires a review is displayed on the IMM eSign web browser. Direct the signer's attention to the signature pad.
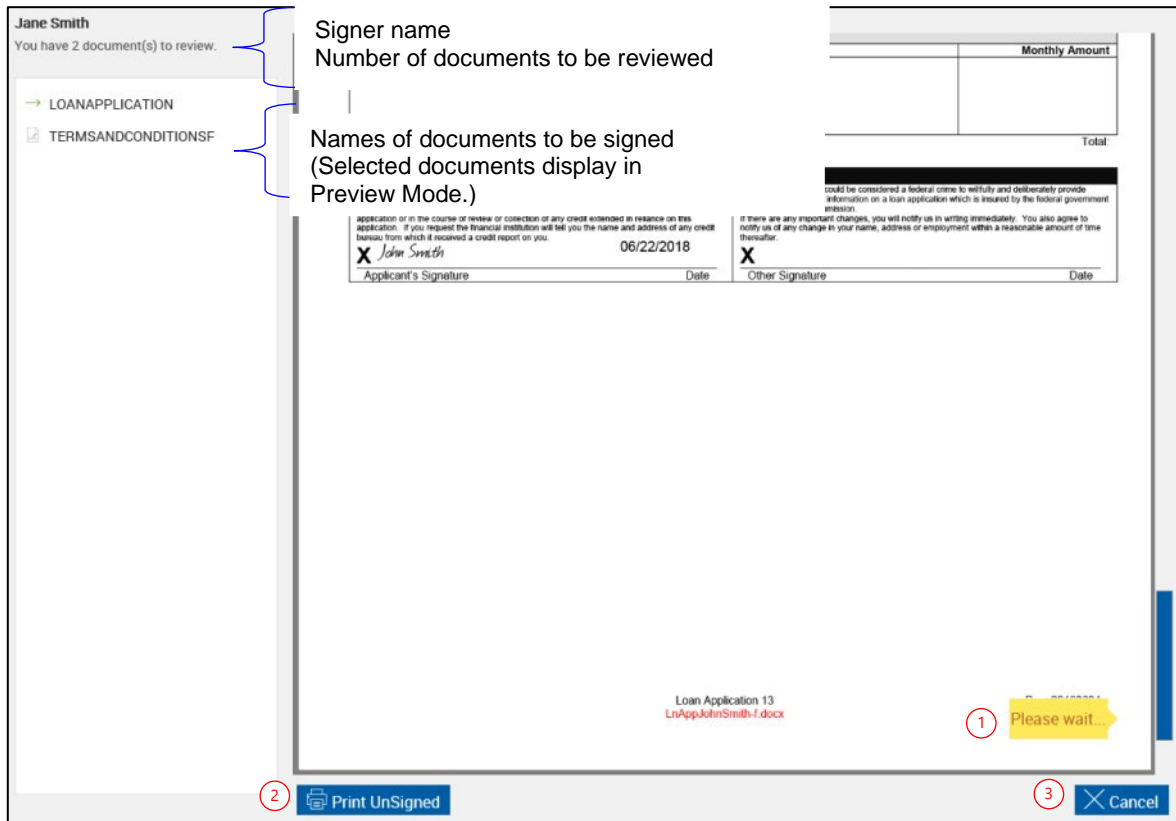
Documents that review confirmation is necessary are listed below the signer name. When a document is selected from the list, it will display in Preview mode. If a document is selected from the list, return to Signing mode by clicking the field in the document where the next signature is required.

1   The IMM eSign web browser automatically navigates to each field that requires a review confirmation. Before the signer applies the review confirmation using the signature pad, the field displayed in the IMM eSign web browser contains the message "Please wait." Once the signer applies the review confirmation on the signature pad, the next review field is displayed in the IMM eSign web browser with the message "Please wait." This continues until the process is complete.

2   **Print Unsigned** allows you to print a copy of this document without signatures.

3   **Cancel** exits signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

4   For review confirmation, the signature pad displays "I reviewed DOCUMENTNAME."
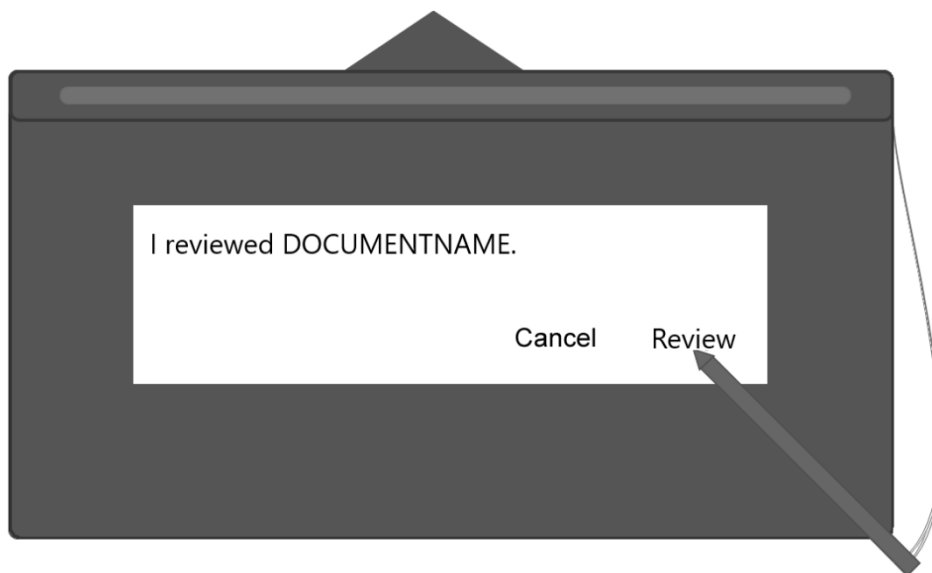
Direct the signer to select **Review** or **Cancel** on the signature pad:

- The signer selects **Review** to confirm review.

- The signer selects **Cancel** to exit signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

The signer continues to confirm review using the signature pad until all of the documents have been signed.

5 When the signer is done signing all of the documents, the message "You have reviewed all documents. Click the Confirm Review and Finish button." is displayed on the IMM eSign web browser.

Direct the signer's attention to the signature pad.

6 The signature pad displays "I confirm that I reviewed the DOCUMENTNAME document set."
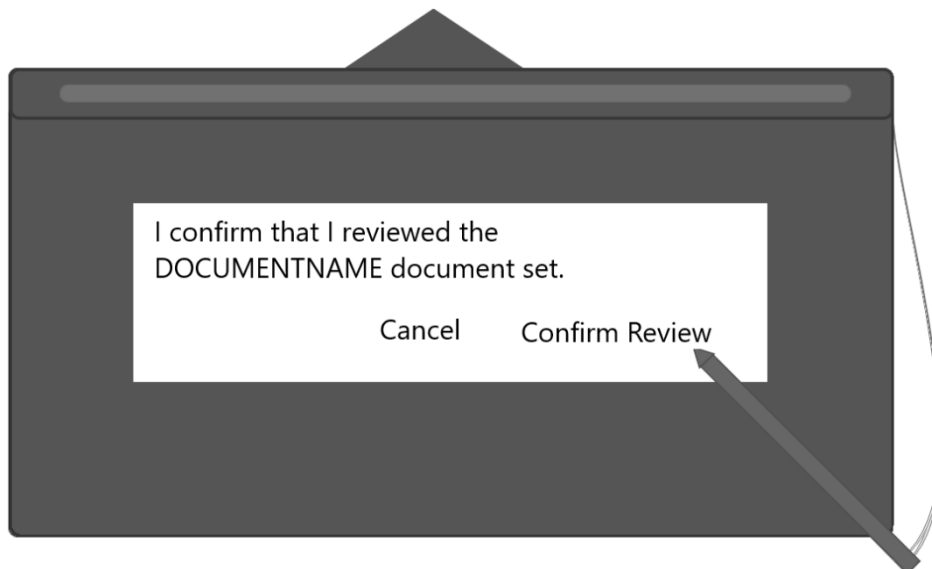
Direct the signer to select **Confirm Review** or **Cancel** on the signature pad:

- The signer selects **Confirm Review** to confirm that he or she viewed the documents.

- The signer selects **Cancel** to exit signing. The Cancelling Document Signing popup is displayed on the IMM eSign web browser. As the FI representative, it is your responsibility to click **Cancel Signing** to terminate the signing process and to return to the eSignature Management page. Prior to clicking **Cancel Signing**, you have the option to provide a reason for cancelling. To continue the signing process, click **Return to Signing**.

7 You are returned to the **eSignature Management** page. Repeat this process as necessary until all of the documents have been reviewed by all of the signers.

After all documents in the session have been signed/viewed by all parties in-person, click **Delivery** to send the documents securely to all of the signing/viewing parties. Refer to **Secure Email Delivery** on page **161** for more details.

> ℹ The **Delivery** button is only available if the parties are signing/viewing in-person.

Click **Continue** to return to the Session Details page.

Type

This is a summary of how terms are reviewed and document review is confirmed:

1. The FI representative reviews the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer.

2. If the signer approves the Disclosure and Consent to the Use of Electronic Signatures and Records, the FI representative clicks **Accept**.

3. The first document that requires a review confirmation is displayed on the IMM eSign web browser.

   > It is recommended to give the signer control of the IMM eSign web browser to review documents.

4. The signer clicks the **Review** arrow to navigate to the bottom of the document and then clicks **Confirm Review** to confirm that he or she viewed the document. If there are multiple documents to review, the signer is moved to the next field.

5. The signer repeats step 4 as necessary until the IMM eSign web browser displays "You have reviewed all documents. Click the Confirm Review and Finish button."

6. The signer clicks **Confirm completion** or **Confirm Review and Finish**. The signer is done. The IMM eSign web browser returns to the eSignature Management page.

7. Repeat this process until all of the signers have reviewed all of the documents.

Refer to the following procedure for details on in-person viewing using the type method:

1   After clicking **Start** from the eSignature Management page, the Welcome page is displayed.
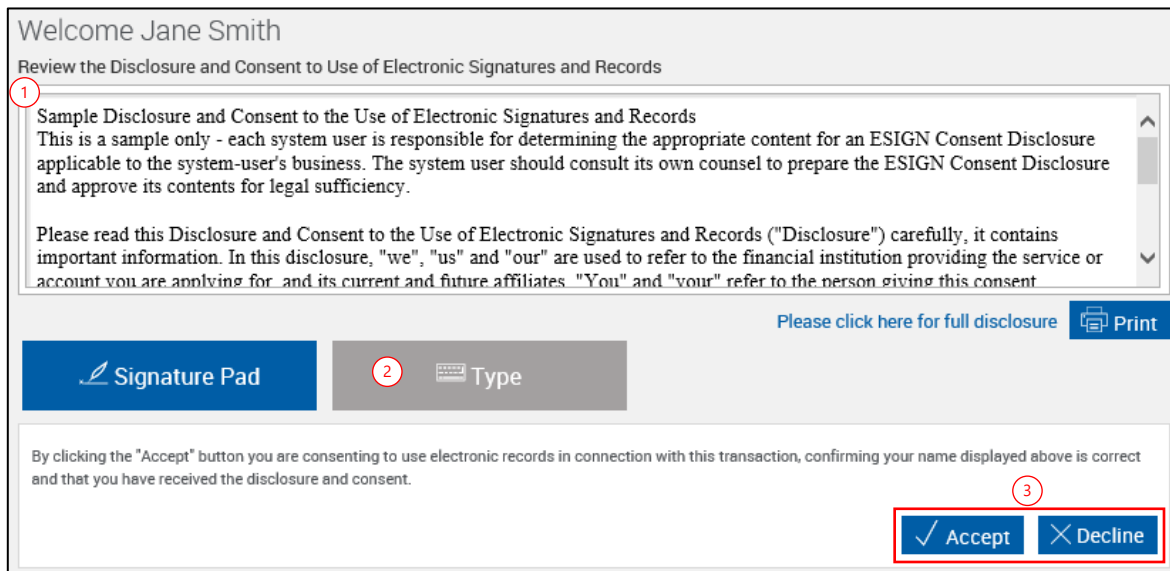
1   Review the Disclosure and Consent to the Use of Electronic Signatures and Records with the signer. You may print the disclosure and consent agreement by clicking the **Print** button, or simply read it by using the scroll bar.

2   Select **Type**. When Type is the default signing method (as set by the Administrator), the Type button is preselected.

3   Click **Accept** to review the documents.

Click **Decline** to stop this transaction. The Declining Terms popup is displayed. Click **Decline Terms** to decline the terms and return to the eSignature Management page. Prior to clicking **Decline Terms**, you have the option to provide a reason for declining. To continue signing the document, click **Return to Terms**.

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2 The signer clicks **Review** to navigate to the bottom of the document that he or she has reviewed.

3   The signer clicks **Confirm Review** for review confirmation of the document.

4 The signer repeats steps 2 and 3 until all documents have been completely reviewed.

When the signer is done reviewing all of the documents, the message "You have reviewed all documents. Click the Confirm Review and Finish button." is displayed on the IMM eSign web browser.

The signer clicks **Confirm completion** or **Confirm Review and Finish** on the IMM eSign browser.
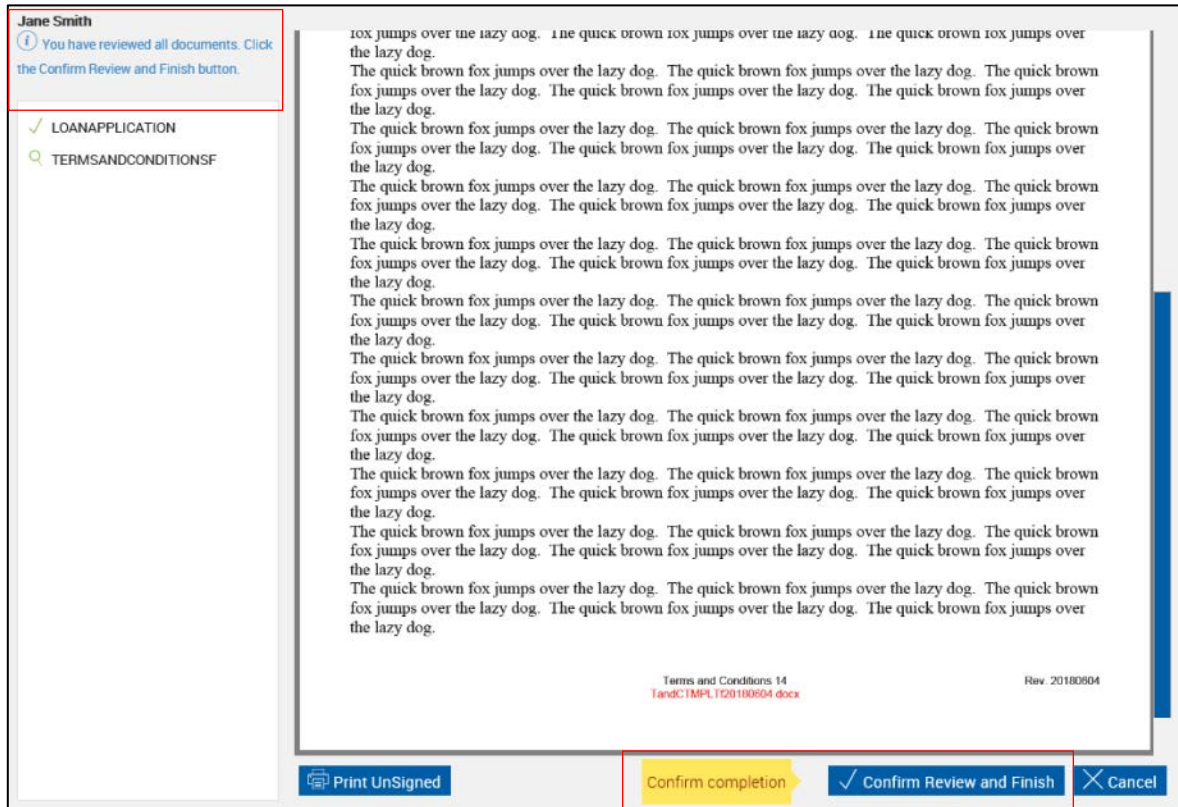
5 You are returned to the **eSignature Management** page. Repeat this process as necessary until all of the documents have been reviewed by all of the signers.

After all documents in the session have been signed/viewed by all parties in-person, click **Delivery** to send the documents securely to all of the signing/viewing parties. Refer to **Secure Email Delivery** on page **161** for more details.

> *i* The **Delivery** button is only available if the parties are signing/viewing in-person.

Click **Continue** to return to the Session Details page.

Remote Signing

1 Sign remotely from the eSignature Management page as follows. Refer to **eSignature Management** on page **158** for an overview of the eSignature Management page and the specific remote signing options.

1 Click one of the remote signing options: Email Authentication, Password Authentication, KBA, or Phone Authentication.

2 When you click a remote signing option, fields appear below the signing option. The visible fields depend on the remote signing option selected. Refer to **eSignature Management** on page **158** for more information.

3 The Message Details section automatically appears at the bottom of the eSignature page.

2   Fill in the information in the Message Details section.

1   **Sender**: Click the drop-down menu to add or change the email address in the **Sender** field. (Default: Your email address)

2   **CC**: The carbon copy (CC) field appears after the Sender field is filled. Click the drop-down menu to add one or more FI employee emails. The selected FI employees are carbon copied on the email.

3   **Subject**: The **Subject** field is prefilled with the name of the signer of the document set. The content can be changed as needed.

4   **Message**: Fill in the **Message** field. Use the default message that is displayed or change as desired.

5   Click **Send**. All in-person signatures and review confirmations must be complete for the **Send** button to be enabled.

3   The eSignature Management page refreshes. The "Session is successfully submitted for Remote Signatures" message is displayed.

4 The signing parties receive emails similar to this:

The signer clicks the link in the email **Click here to review and sign Document Set (for John Smith)**.

For password authentication, KBA, and phone authentication, the signer is prompted to enter information. Once authorization is complete, the signer must consent to do business electronically.

Then, the signer will then be prompted for each signature, initial, and review confirmation required throughout the signing process. Documents can be viewed and printed.
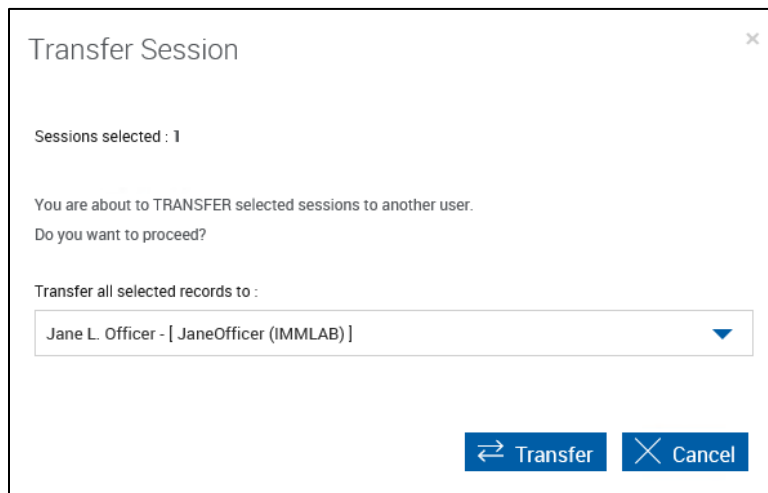
Transferring a Session

Transfer a session from the Search Active Sessions page or the Session Details page.

- If transferring a session from the Search Active Sessions page, you can transfer multiple sessions at once. Refer to Search Active Sessions **Search Results** for more information on entering Transfer mode and selecting sessions to transfer.

- If transferring a session from the Session Details page, refer to **Session Details** for more information on the **Transfer** button.

To transfer session ownership from one user to another, do the following:

1. Once the session(s) is selected on the Search Active Sessions page or the Session Details page, click **Transfer**. The Transfer Session popup is displayed.

2. To continue, select a user from the **Transfer all selected records to** drop-down list.

3. Click **Transfer** to continue or **Cancel** to cancel the session transfer and return to the Search Active Sessions page or Session Details page. Once **Transfer** is clicked, the selected session is transferred to the new session owner. If the session was transferred from the Search Active Sessions page, the page reloads and displays the new owner in the session information. If the session was transferred from the Session Details page, the page reloads, the buttons are disabled, and the message "Session successfully transferred" is displayed.

Unlocking a Session

Unlock a session from the Search Active Sessions page. Refer to **Search Active** on page **144** for more information on the features and functions of the Search Active Sessions page.

To unlock a selected session, do the following:

1. On the Search Active Sessions page, click the **Unlock** 🔓 icon next to the session that you would like to delete. The Unlock Session popup is displayed.
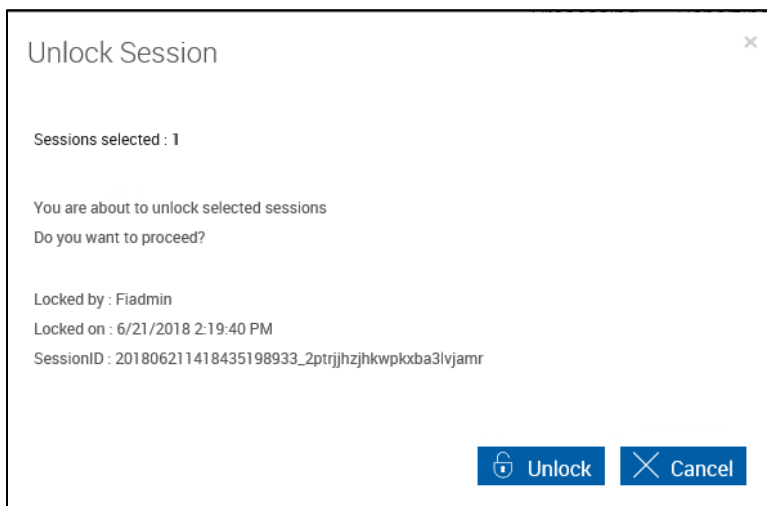
2. To continue, click **Unlock** to unlock the session. The selected session is unlocked and the Search Active Sessions page is refreshed. Click **Cancel** to return to the Search Active Sessions page.

Deleting a Session

This setting is controlled by the Administrator. Delete one or more sessions from the Search Active Sessions page. Signed sessions cannot be deleted. Refer to **Search Active** on page **144** for more information on entering Delete mode and selecting the sessions to delete.

To delete one or more sessions, do the following:

1. Once the session(s) is selected on the Search Active Sessions page, click **Delete**. The Delete Session popup is displayed.
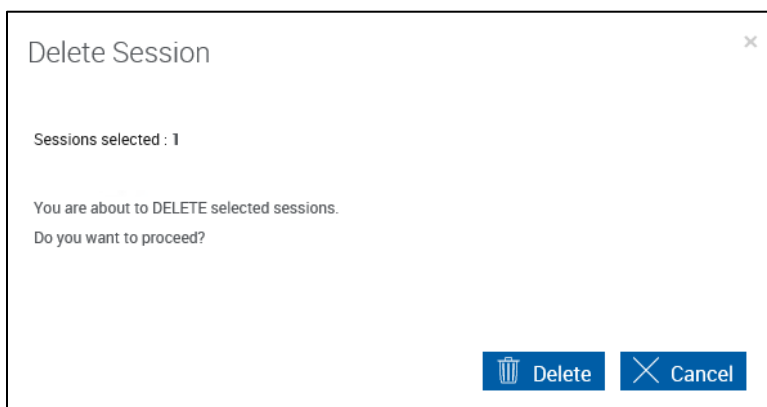
2. To continue, click **Delete** to delete the session(s). The selected session is deleted and the Search Active Sessions page is refreshed. Click **Cancel** to return to the Search Active Sessions page.

Archiving Documents

This feature allows you to archive documents that have been completed in full, including all required signatures. The **Archive** button remains disabled until all signatures have been secured. An archived document is flattened and cannot be modified.

To archive all of the documents in the document set, click **Archive** on the Session Details page. Once the document set is archived, the message "Session Archived Successfully" is displayed at the top of the page and all buttons are disabled.
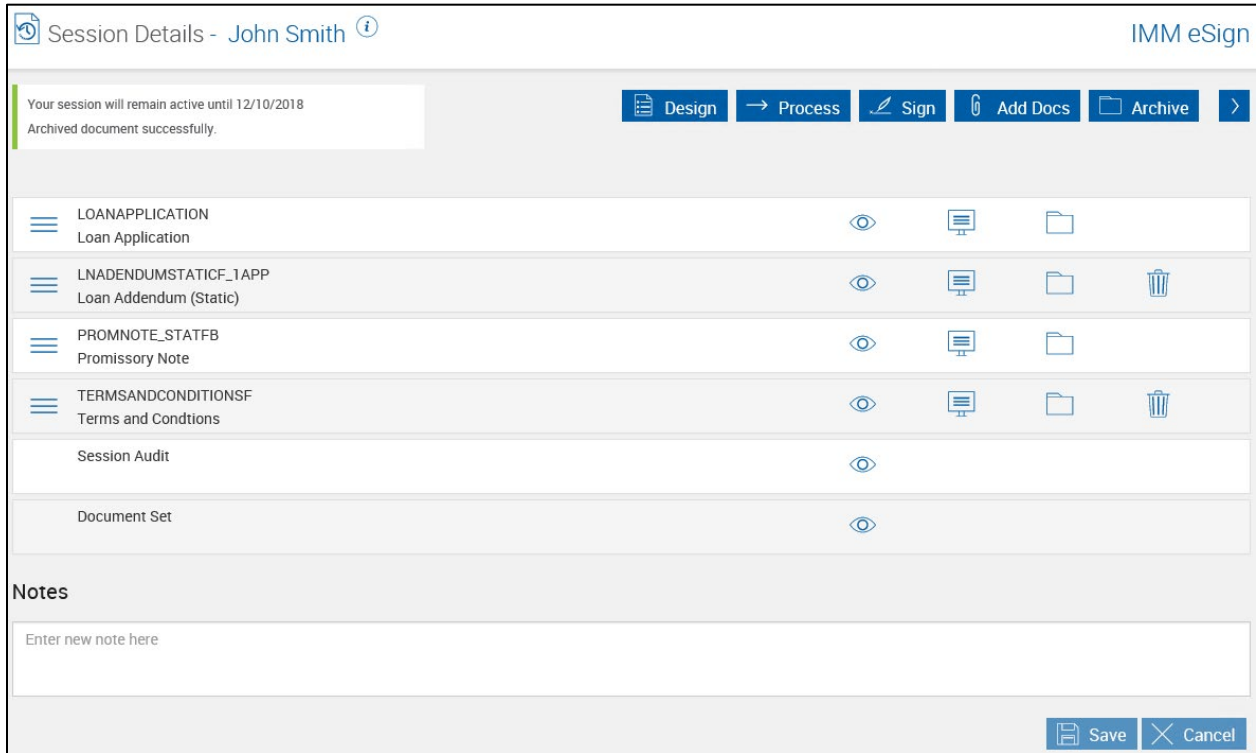
If the indexing message displays *"0 of x archived document(s) indexed successfully,"* contact your FI Administrator.

Since this document set has been archived, there should be no changes to index fields.

To archive individual documents (RTS only), click the Archive ☐ icon for the particular document. Once the document is archived, the document is removed from the set and "Archived document successfully" is displayed at the top of the page.
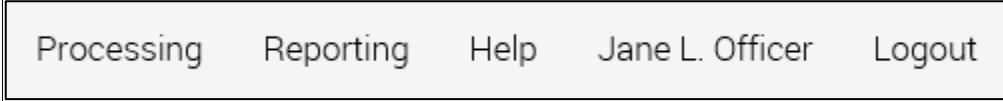
IMM eSign Menus

> ℹ️ Using IMM eSign on a tablet requires the use of a tablet-specific stylus.

After you log in, the Search Active Sessions page is displayed. Your company logo, menu choices and your user name display in the menu bar.

| Processing | Reporting | Help | Jane L. Officer | Logout |

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

Processing

Reporting

Help

User Name

Logout

Processing

The Processing menu includes the following options, which are described in detail in this section of the guide.

Create New Session (XML Only)

Search Active

Search Completed

Cases (eSign *plus*)

Loan Coupons

Starter Checks

Custom Links
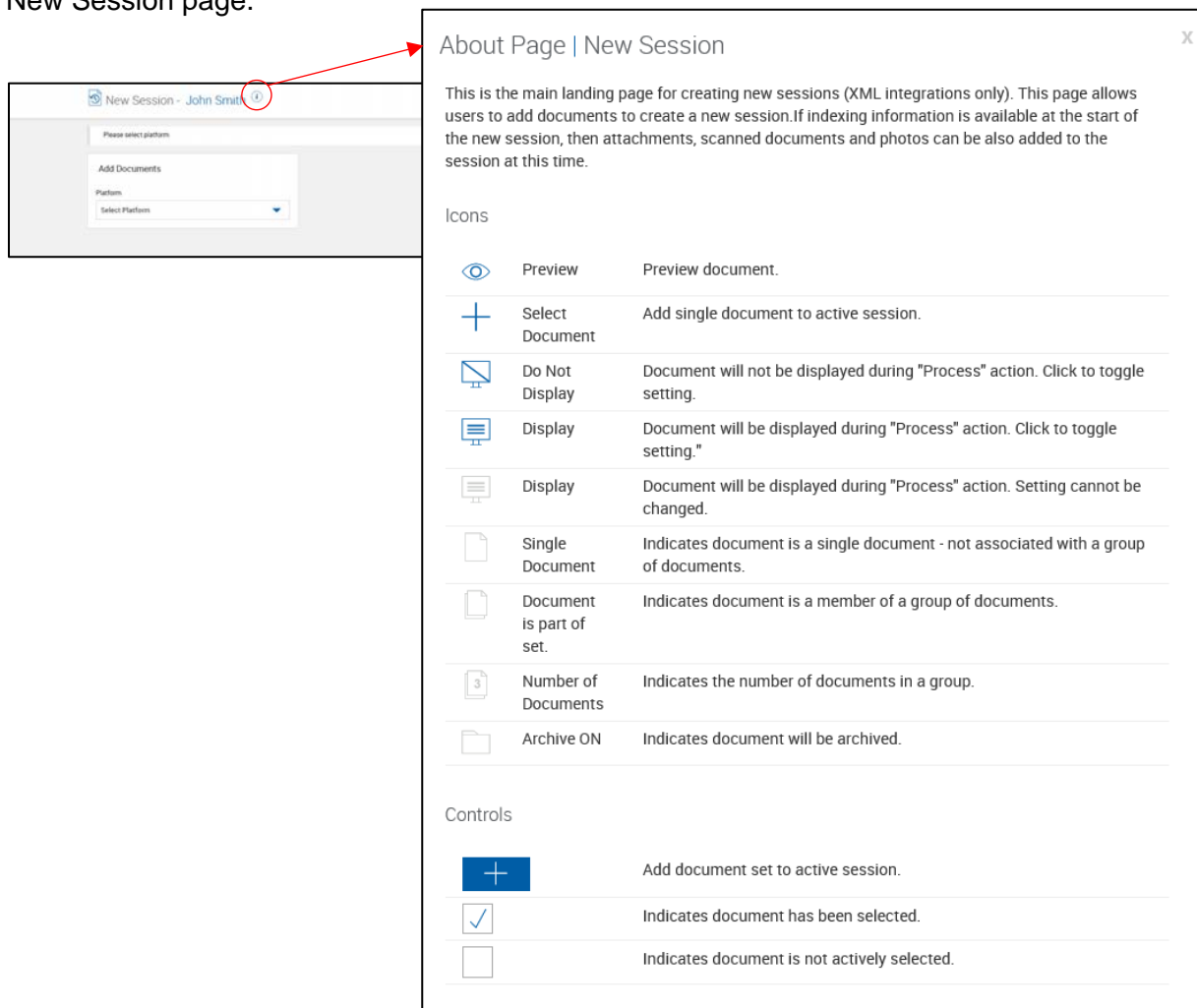
Create New Session (XML Only)

Click **Processing** > **Create New Session** to access the New Session page. The New Session page allows users to create an XML session directly in IMM eSign.

Alternatively, when data is passed from the core/host system, a variation of the New Session page is automatically launched in IMM eSign.

To use the New Session page, refer to **Creating a New Session (XML Only)** on page **14**.

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

Once you have entered the appropriate information, the New Session page is displayed as shown in the following example.

1. **Preview**: Click **Preview** to view all of the selected documents in a PDF popup window.

2. **Process**: Once you are done adding and deleting the documents for the session, click **Process**. Refer to **Processing Documents** for details about processing the documents. After you process the documents, you can still add documents to the session using the **Add Docs** button on the Session Details page. Refer to **Adding Documents** for details.

3. **Add Documents**: When creating a new session from the **Processing** > **Create New Session** menu, add documents and documents sets from the library. Refer to **Adding Documents** for details about the Add Documents area.

When the New Session page is automatically launched in IMM eSign after data is passed from the core/host system, the Add Documents area does not contain the **Platform** field. Instead, the Add Documents area contains the **Library**, **Attach**, **Scan**, and **Photo** tabs as shown below. In IMM eSign *plus* integrations, only the **Library** tab is available. Refer to **Adding and Deleting Documents for a New Session** on page **14** for details about using the New Session page when it is launched after data is passed from the core/host system.
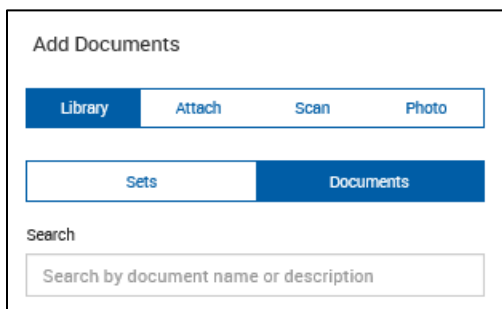
4   **Selected Documents:** The documents that are added to the session are displayed in this area.

5   **Indexes**: When creating a new session from **Processing** > **Create New Session**, there are no indexes because the documents have not been processed yet. When data is passed from the core/host system, the index data is displayed here.

6   **Documents Library** or **Document Sets Library**: When **Documents** is selected in the Add Documents area, the Documents Library is displayed. When **Sets** is selected in the Add Documents area, the Document Sets Library is displayed. Click the title row to expand and collapse the available documents.

7   Document Indicators:

- **Single Document** ⬜: The document is a single document and is not associated with a group of documents.

- **Document is part of set** ⬜: The document is a part of a group of documents.

- **Number of Documents** ⬜: The number indicates the amount of documents in a group. (Only applicable to the Document Sets Library)

Library

The Documents Library and Document Sets Library lists the available documents. Collapse or expand the Documents Library and Document Sets Library by clicking on the title row.

Documents Library

If **Documents** is selected in the Add Documents area, the Documents Library is displayed. To select documents, click **Select Document** ╋ next to the desired documents.
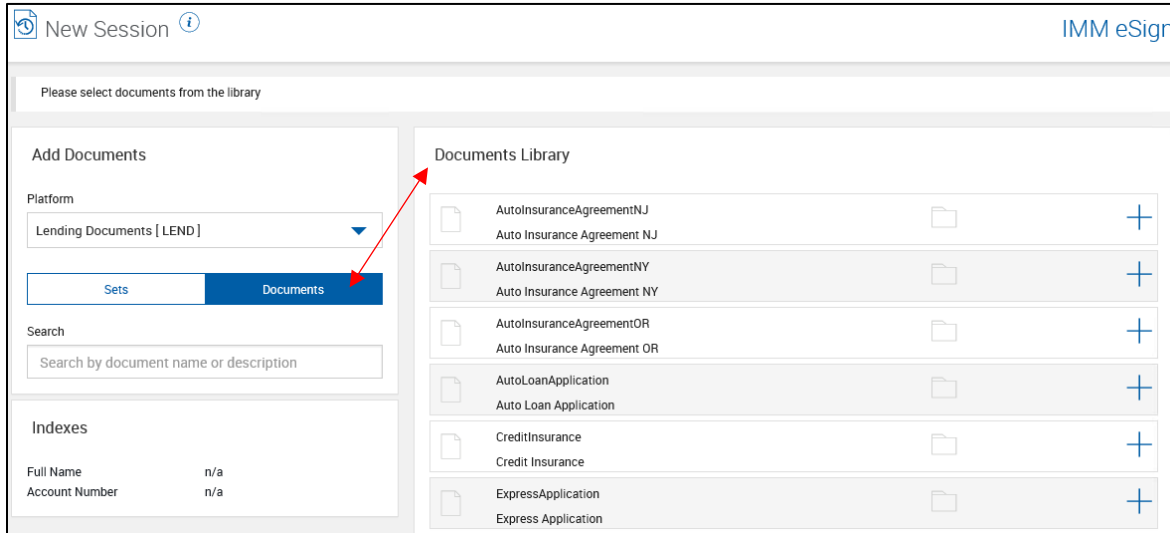
Document Sets Library

If **Sets** is selected in the Add Documents area, the Document Sets Library is displayed.
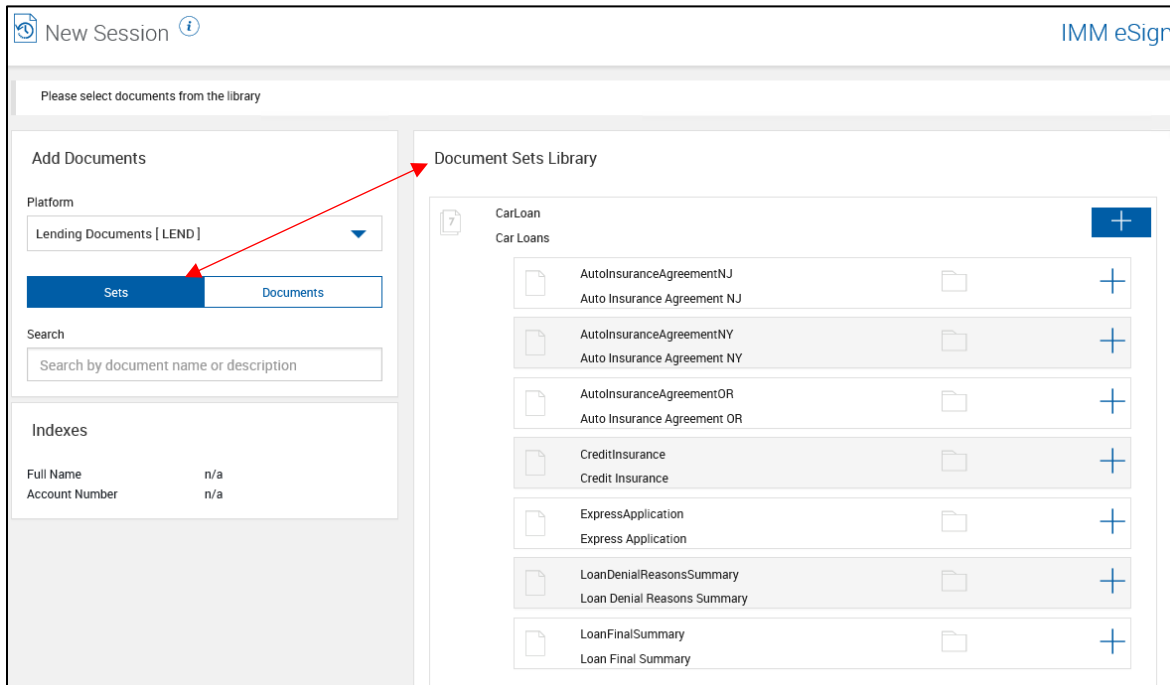
To select all of the documents in a document set, click **Select Document Set** ➕. To select specific documents in a document set, click the document set row to expand it. Then, click **Select Document** ✛ next to the desired documents.
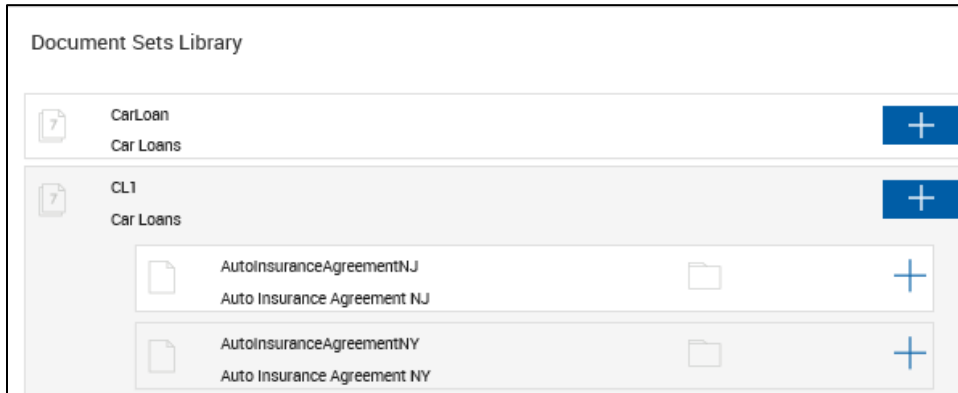
If a document set or part of a document set is added to the Selected Documents area, the **Select Document Set** ➕ icon for that document set is not shown. Similarly, if a single document that is part of a document set is added to the Select Documents area, the **Select Document** ✛ icon for that document is not shown.
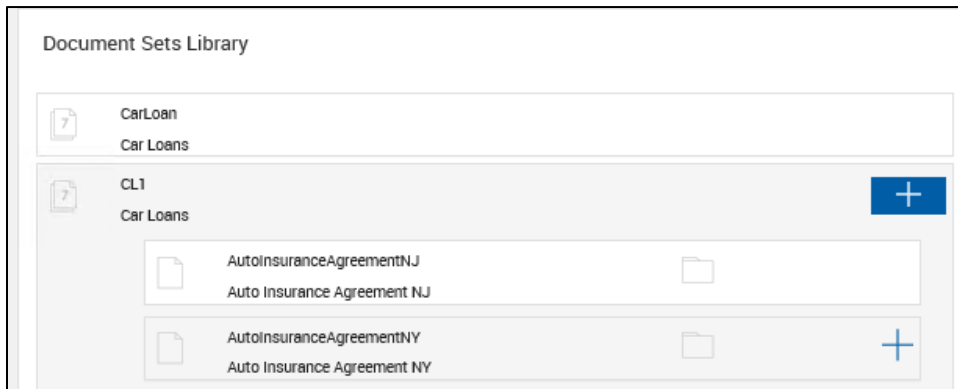
Selected Documents

When documents are added to the session, the Selected Documents area is displayed.
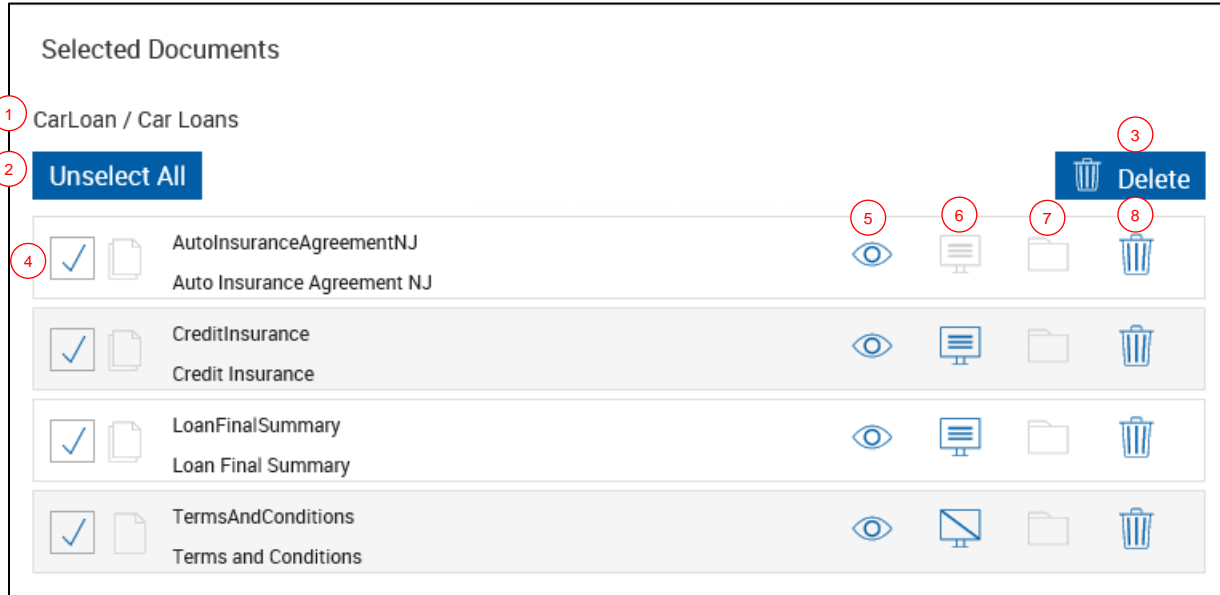
1. **Name of Document Set**: If a document set or documents that are part of a document set are added to the Selected Documents area, the name of the associated document set is displayed here.

2. **Unselect All** / **Select All**: When there are four or more documents, the **Unselect All** button appears. Click the button to toggle between **Unselect All** and **Select All**. When **Unselect All** is clicked, all of the documents that were checked become unchecked. When **Select All** is clicked, all of the documents that were unchecked become checked.

3. **Delete**: Click Delete to remove selected documents from the list.

4. ☑ : When the checkbox next to a document is checked, clicking **Delete** will remove that document from the Selected Documents area. When the checkbox next to a document is unchecked, clicking **Delete** will have no effect on that document.

5. **Preview**: Click the **Preview** 👁 icon to view a single document in a PDF popup window. From this window, you can view and print documents. Documents cannot be edited in Preview Mode. Refer to **Previewing and Printing Documents** on page **24** for more information.

6. **Display**: Click the icon to toggle the display state of the document. When display is turned on, the **Display** 🖥 icon is shown and the document is displayed in PDF format while processing. If display is turned off, the **Do Not Display** ⬜ icon is shown and the document will not display during processing. This setting is controlled by the Administrator. The default state of this icon is determined when the document is defined.

7. **Archive**: Documents that can be archived have an **Archive** ▭ icon. The **Archive** icon will not display if a document has an unsigned signature field. If the Archive icon is clicked, the document will be archived. Refer to **Archiving Documents** on page **135** for details.

8   **Delete**: Click the **Delete** 🗑 icon to the right of the document name to delete the document from the session.

Search Active
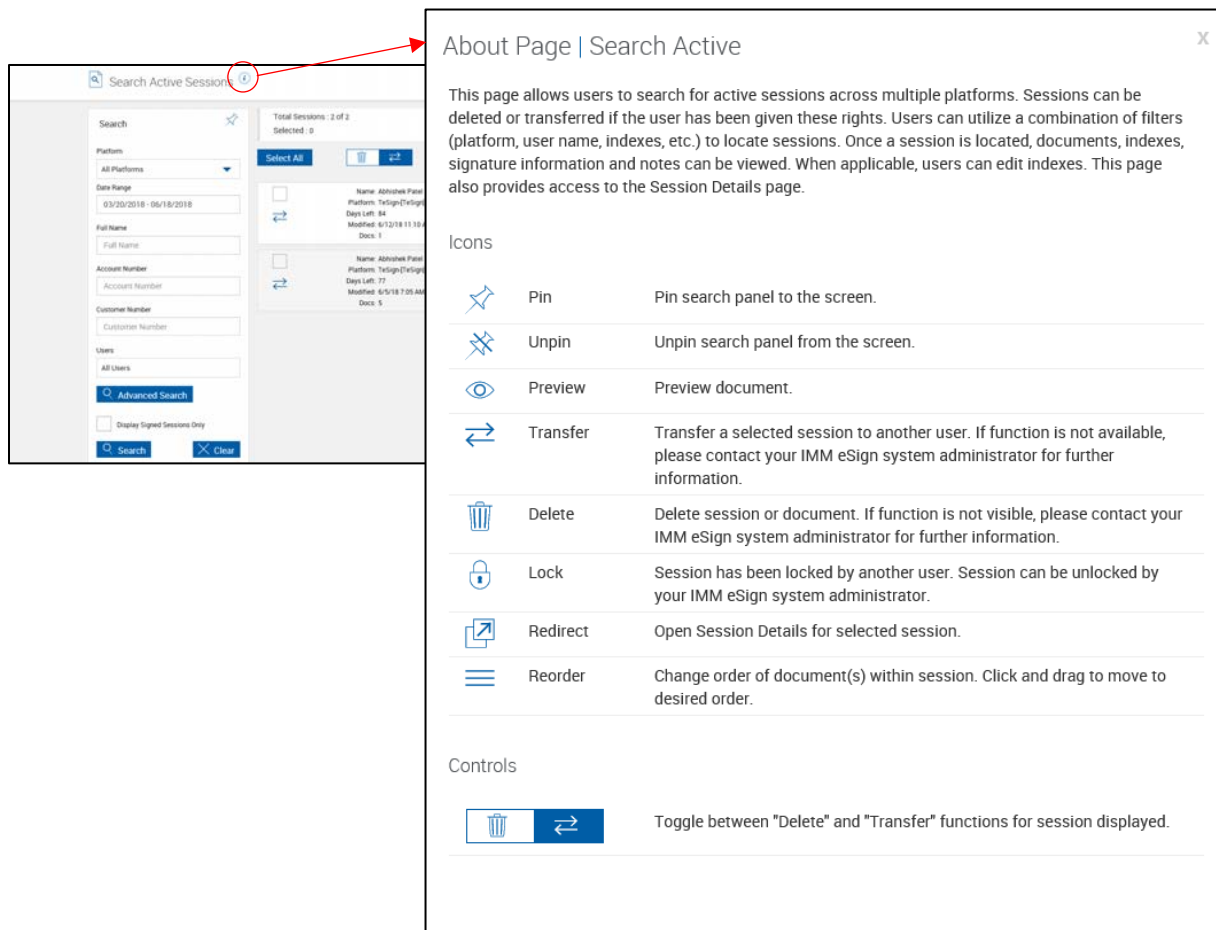
The Search Active Sessions page allows users to retrieve active sessions that have previously been saved. Search Active Sessions on the PC allows you to retrieve active sessions for processing, signing and archiving. On the iPad, sessions can be viewed and signed.

Saved sessions are retained for 90 days (default) before they expire. Your settings may vary as they are set by your Administrator.

From the Search Active Sessions page, FI representatives can access the **Session Details** page.

To open the Search Active Sessions page, click **Processing** > **Search Active**.

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

To search for active sessions, do the following:

1   Enter the search parameters. Refer to **Common Routines** on page **187** for more information. Search all active sessions by leaving all search parameters blank. Up to 150 sessions will display.

2   Select **Display Signed Sessions Only** if you would like to only display sessions that are signed in the search results.

3   After selecting or entering search parameters, click **Search** to display sessions matching the search parameters, or click **Clear** to reset the search parameters and clear any existing results.

After clicking **Search**, the Search Active Sessions page refreshes listing the search results.

1   Click the **Open Session Details** icon for any unlocked session to open the Session Details page for that session.

2   The Open Session Details icon will not display for locked sessions.

Clicking on session rows will expand that session for additional details.

Search Panel

1 **Pin Search Panel**: Clicking in the pin will display ✗ or collapse ✗ the search parameters section of the page when the results are displayed.

2 **Platform**: Search through all available platforms, or click the dropdown to select a single platform to search.

3 **Date Range**: Click the field to display a calendar and adjust the date range as desired.

4 **Index Fields Region**: Enter any additional search criteria in the available fields to narrow the search. The search fields displayed are controlled by the administrator.

5 **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. The display of this field is controlled by the administrator.

6 **Advanced Search**: Click the Advanced Search button to reveal additional search index fields.

7 **Display Signed Sessions Only**: Click the checkbox to display only sessions that have been signed.

8 **Action Buttons**:

   ▪ Click **Search** to continue.

   ▪ Click **Clear** to reset the search parameters.

Search Results

1   **Select All/Unselect All**: Click **Select All** to select all unlocked sessions in the results list and place a check by the selected sessions. Click **Unselect All** to deselect all selected sessions in the results list.

2   **Delete/Transfer Mode:** Click **Delete** or **Transfer** to toggle all related icons and buttons from **Delete** to **Transfer** and vice versa.

3   **Delete/Transfer**: This button changes state when the **Delete/Transfer Mode** buttons (2) are toggled. Clicking **Delete** [🗑 Delete] removes any selected sessions. Clicking **Transfer** [⇄ Transfer] changes session ownership of any selected sessions to another user. Refer to **Transferring a Session** for more details on changing session ownership.

4 **Sort By**: Click the **Sort By** button to choose the order in which the search results will appear (Date Modified Ascending, Date Modified Descending, Name Ascending, Name Descending).

5 Click the Lock icon 🔒 to unlock a locked session. Clicking this icon will display the Unlock Session popup, which will provide who locked the session, when it was locked, and the sessionID. The ability to unlock a session is controlled by the Administrator.

> ℹ️ Sessions automatically lock when opened for user activity and become unlocked when a user completes all activity for that session and closes the session or logs out. Sessions may remain locked unexpectedly if the user does not complete the session and closes the browser. To prevent a session from remaining locked, the user should logout after all session-related activity is completed.

6 **Selection Checkbox**: Click to check or uncheck (select or deselect) the session to be transferred or deleted.

7 **Session Transfer/Delete Icon (⇄ / 🗑)**: Click the **Transfer** ⇄ icon to transfer the session to another owner. Click to **Delete** 🗑 icon to delete a single document.

8 **Session Details Region**: The name of the first document in the session is displayed. This region summarizes the session details with Session name, Platform, Number of Days Left until expiration, Date and time last modified and the number of documents in the session.

9 **Index Fields Region**: This section provides the index information for the session. The fields names displayed vary by installation.

10 **Open Session Details**: Click this icon to go to the Session Details page for the selected session. Refer to **Session Details** for detailed information.

11 **Documents, Signature Status, and Notes Tabs**: Click on a tab to view the corresponding information:

- **Documents Tab:** Click to view a list of the documents for the selected session. Refer to the **Session Details** section for details about the features and functions of the page.

- **Signature Status Tab**: Click to display details about the signature status of the documents.

- **Notes Tab**: Click in the Notes field to add information relative to the document, user, or transaction. There can be several notes added. Notes travel with the session until the session is archived. Notes are retained with the session but will not be archived with the document set. Click **Save** to add the note to the session. Click **Cancel** to delete the contents in the Notes field.
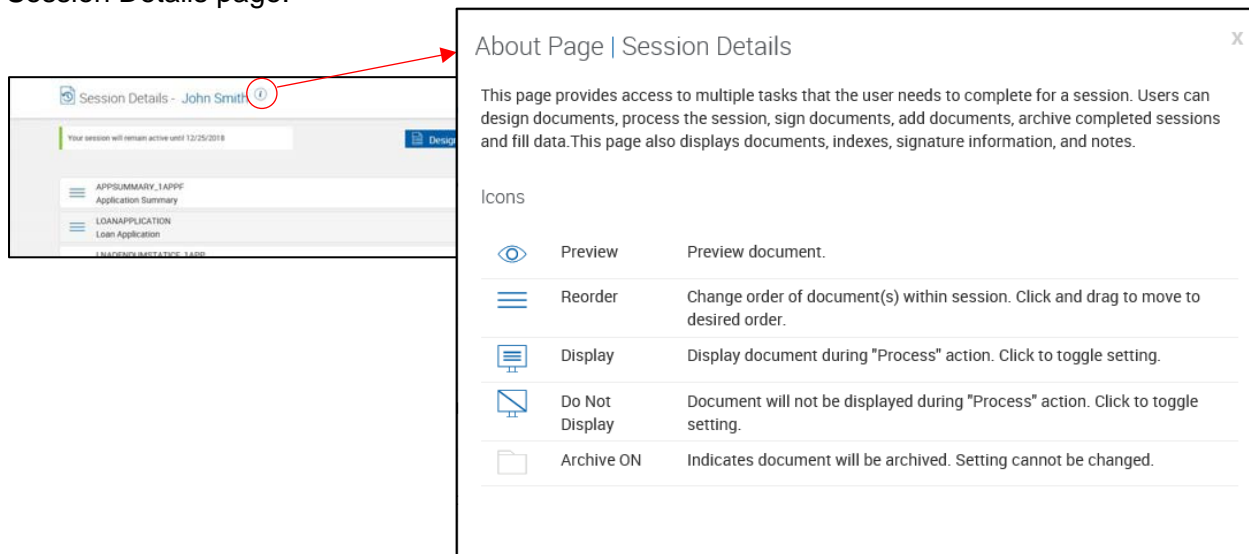
Session Details

When the documents are loaded to IMM eSign or when an active session is opened, the Sessions Details page is displayed. The user can perform the tasks associated with the session on this page.

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

The default Session Details page can be displayed with the document indexes expanded or minimized. This view is determined by your Administrator. Click on a row to expand or minimize the view.

Expanded Sessions

Minimized Sessions

The Session Details page will vary depending on your integration.

For IMM eSign plus integrations, the routing information is displayed on the page.

Current Step : Sign Documents
Step Instruction : Sign either In Branch or Remote

> If you click the History icon, a popup is displayed with the Comments, History, and Details tabs.
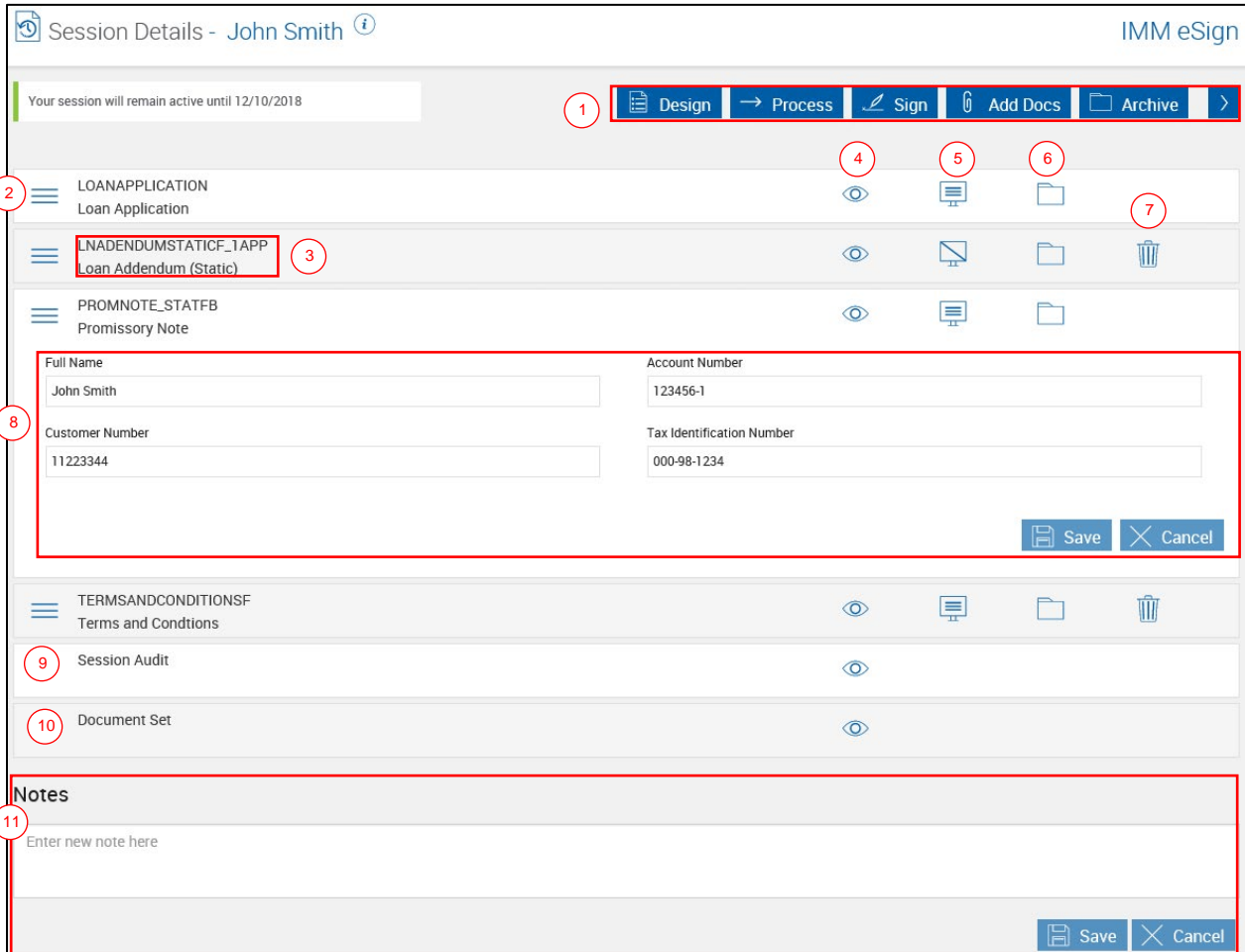
1   **Session Controls**: Use the session control buttons to perform actions related to the session. Use the ⟩ ⟨ arrows to display additional buttons.

- **Design**: Click this button to access the Document Designer page. For details on getting started with the Document Designer page, refer to **Using Document Designer** on page **26**. For details on the Document Designer page controls, refer to **Document Designer** on page **155**. The Design button is disabled after document session ownership has been transferred.

> ℹ️   Prosign documents may have unmapped fields and must be processed using Document Designer before being submitted for remote signatures.

> ℹ️   This feature is not available for iPad users.

- **Process**: Click this button to process documents. This button will be disabled if document session ownership has been transferred. The Process button will not be enabled if no documents are marked for display. Refer to **Processing** on page **137** for more information.

  > ℹ️ This feature is not available for iPad users.

- **Route**: This button is available for IMM eSign *plus* integrations. Click this button to route the session. Refer to **Routing Documents** on page **74** for details.

- **Sign**: Click this button to go to the eSignature Management page to begin signing documents in person or remotely. Refer to **eSignature Management** on page **158** for more information.

  > ℹ️ When unmapped or optional fields are detected, you are rerouted to the Document Designer page instead of the eSignature Management page.

- **Add Docs**: Click this button to attach external documents, scanned items, and photographs to this session. Refer to **Adding Documents** on page 60 for more information.

- **Archive**: Click this button to archive the session. Archive finalizes the session for use by your imaging system for permanent storage. No additional changes are allowed after the session is archived. The Archive button will be enabled if all documents within the session have been signed or if no documents in the session have signature fields. Refer to **Archiving Documents** on page **135** for more information.

- **Fill**: Click this button to populate missing index information with information from other documents in the document set. If the field is not populated anywhere, clicking Fill will not correct the missing information.

- **Transfer**: Click the Transfer button to Transfer session ownership from one user to another user. Refer to **Transferring a Session** on page **133** for details.

2 **Reorder**: Drag and drop the **Reorder** ☰ icon to change a document's order in the document set.

3 **Document Name** and **Document Description**: The name and description of the document in the document set. Click on the row to view the indexes associated with the document.

4 **Preview**: Click the **Preview** 👁 icon to view a single document in a PDF popup window. From this window, you can view and print documents. Documents cannot be edited in Preview Mode. Click the icon for the *Document Set* to view all the documents in the set in a PDF popup window. Click the preview icon next to Session Audit to view the audit information for the session. Refer to Previewing and Printing Documents on page **24** for more information.

5 **Display**: Click the icon to toggle the display state of the document. When display is turned on, the **Display** 🖥 icon is shown and the document is displayed in PDF format while processing. If display is turned off, the **Do Not Display** 📺 icon is shown and the document will not display during processing. This setting is controlled by the Administrator. The default state of this icon is determined when the document is defined.

> *(i)* On the Session Details page, the Display icon is now available for attachments with fillable data fields. During document processing, attached documents with fillable data fields are automatically displayed. Users can adjust the display settings by clicking the Display icon. Administrators cannot control if attachments are displayed; however, the Retrieved Session Default administrative setting will apply to attached documents with fillable data fields. If the Preserve Original Selection administrative setting is selected, the user's preference for the display of attachments is remembered.

6 **Archive**: Documents that can be archived have an **Archive** ☐ icon. The **Archive** icon will not display if a document has an unsigned signature field. If the Archive icon is clicked, the document will be archived. Refer to **Archiving Documents** on page **135** for details.

7 **Delete**: Click the **Delete** 🗑 icon to the right of the document name to delete the document from the session. At least one document must remain in the list. Attachments can be removed. See **Deleting a Session** on page **134** for detailed information.

8 **Document Index Fields**: When the document is expanded, the document index information is displayed.

9 **Session Audit**: Click the **Preview** icon to display the Session Audit. This report lists all activities that take place during a session. This report will be archived along with the documents. Click the preview icon next to Session Audit to view the audit information for the session.

10 **Document Set**: Preview all of the documents in the document set in one file.

11 **Notes:** Click in the Notes field to add information relative to the document, user, or transaction. There can be several notes added. Notes travel with the session until the session is archived. Notes are retained with the session but will not be archived with the document set. Click **Save** to add the note to the session. Click **Cancel** to delete the contents in the Notes field.

Document Designer

> *(i)* This feature is not available for iPad users.

The Document Designer page allows you to assign a template to unknown documents, map unmapped fields, and set optional fields as required or not. You can add, edit or delete signature fields, signature date fields, initial fields, textboxes, checkboxes, and dropdown lists.

In addition, this page can also be used to add, edit or delete signer (party) information. Attachments can be requested from remote parties from this page as well.

You can access the Document Designer from the Session Details page or eSignature Management page.

> **ℹ** Signed documents cannot be modified.

> **ℹ** When templates must be assigned, fields are unmapped, or fields are optional, the Document Designer page is displayed in different modes. Refer to **Using Document Designer** on page **26** for more information.

1   **Action Buttons**:

- **Continue**: The Continue button is only enabled when all Signature and Initial fields in all documents in the current session are mapped to Signers and any Textbox/Checkbox/Dropdown fields are mapped with a Role/Type.

- **Cancel**: The Cancel button will return you to the page from where the Document Designer was accessed.

2   **Review Assignments / Manage Unmapped Fields / Review Optional**: When **Review Assignments** is displayed, click it to review the party that is assigned to each field (RTS). When **Manage Unmapped Fields** is displayed, you are in Manage Unmapped Fields mode (XML). When **Review Optional** is displayed, click it to review optional signatures and fields (XML). Refer to **Using Document Designer** on page **26** for more information.

3   **Add Signer:** Add a new signer.

4   **Request Attachments**: Click to add accompanying documents that may be required for a signer who is signing remotely. This button will be enabled only when at least one signer is

selected for remote signature. Refer to **Requesting Attachments** on page **51** for detailed information about adding Remote Attachments.

5 **Signers**: Lists all known signers and their email addresses (if available) and lists the number of documents for each signer. Double click on a signer's name to modify the signer name or email.

- ▪ Click the document icon ⬚ to view documents associated with the selected signer. Refer to **Adding, Editing, and Removing Signers** on page **37** for detailed information on adding, editing and deleting signers.

6 **Documents**: Lists all documents currently in the session with the number of signatures or initials for each document. Click the people icon ⬚ to view the signers associated with the selected document. Attachments will display and Signature/Initial fields can be added to these attachments.

- ▪ Documents not associated with a signer display with a yellow background.

- ▪ Signers not associated with a document display with a yellow background.

- ▪ When a signer is selected while modifying a document, documents associated with that signer will display with a green background.

7 **Document name and navigation buttons**: Displays the name of the document currently being reviewed. Navigation buttons allow moving between the documents in the session.

8 **Field buttons**: Click and drag these fields into a document. You can then associate a signer, role or type with the field.
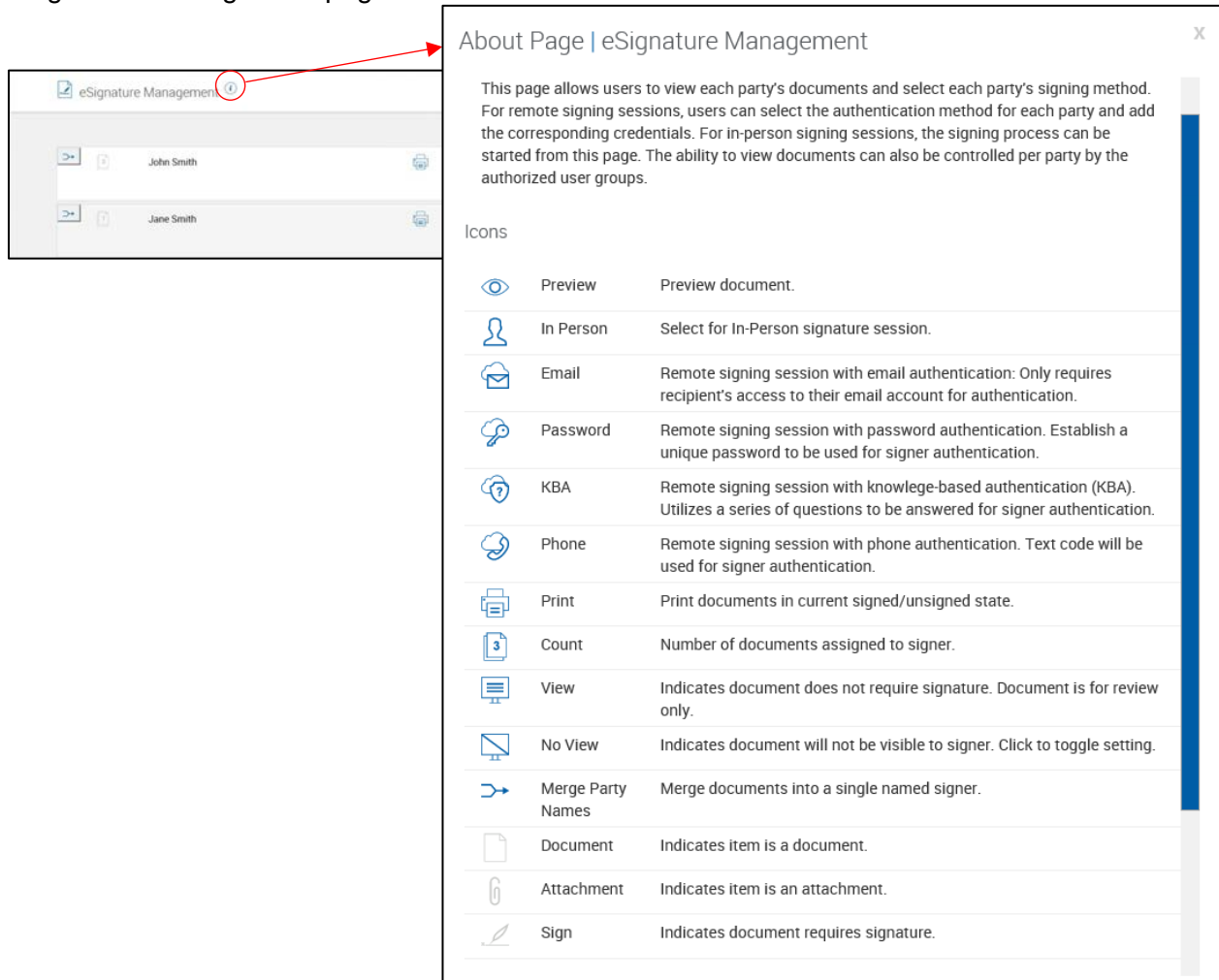
> ⓘ Colors defined in this area are used in the Blue theme and will change when other themes are used.

eSignature Management

After clicking **Sign** on the Session Details page, the eSignature Management page is displayed.

The Page Help button provides a quick listing of icons and functions available and related to the eSignature Management page.

The eSignature Management page displays a list of signers as well as the signing/viewing method. Remote signing is only available if the Remote Signatures add-on is enabled.
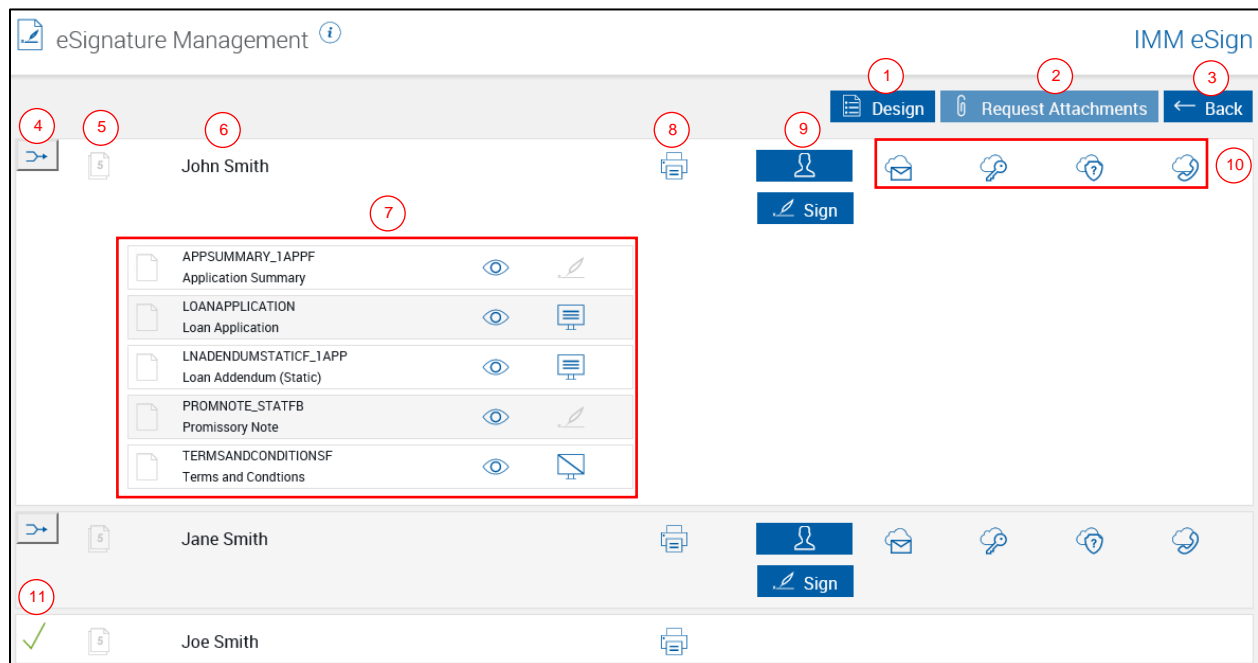
1 **Design:** Click this button to access the Document Designer page. For details on getting started with the Document Designer page, refer to Using Document Designer. For details on the Document Designer page controls, refer to **Document Designer**. The Design button is disabled after document session ownership has been transferred.

> ℹ This feature is not available for iPad users.

2 **Request Attachments:** Supporting documents such as pay stubs, W2s, Driver License, Passport, etc. can be requested as required from a remote signer by using the Request Attachments option. This option is for Remote Signatures only. The button is disabled until a remote signing option is selected. Refer to **Requesting Attachments** on page **44** for detailed information about adding remote attachments.

3 **Back:** Click **Back** to return to the Session Details page.

4 **Merge**: Click to merge two or more signers. This button will not be displayed if there is only one signer. Refer to **Merging Signers** on page 76 for more information.

5 **Number of Documents**: The icon displays the number of documents in the document set that are assigned to the signer.

6 **Party Name**: The name of the person who will sign and/or view the document(s).

7 **View the Document Set**: When a party's row is clicked, the row expands to display the documents in the document set. Click the row again to hide the document list. The

documents that have the **Sign** ✍ icon displayed next to them are documents that the party must sign. Depending on the settings configured by your Administrator, you can

perform the following actions before the signer/viewer completes the signing/viewing process:

- **Preview**: Click the **Preview** 👁 icon to view a single document in a PDF popup window. From this window, you can view and print documents. Documents cannot be edited in Preview mode.

- **View**: Click the icon to toggle the view state of the document. When the **View** 🖥 icon is displayed next to a document, the party must view the document during the signing/viewing process and confirm that he or she reviewed the document. When the **No View** 🖥 icon is displayed next to a document, the party will not view the document during the signing/viewing process. The default state of this icon is determined when the document is defined.

> ℹ The **No View** 🖥 icon may not be displayed. This setting is controlled by your administrator.

8 **Print**: Click to print the documents.

9 **Sign In Person**: When the **Sign In Person** 👤 button is clicked, the documents will be signed/viewed in person.

10 **Sign Remotely**: When one of the remote authentication methods are selected, documents will be signed remotely.

11 **Done**: The green check mark ✓ indicates that the party has completed the signing/viewing process.

Sign In Person

When the **Sign In Person** 👤 button is clicked, the documents will be signed/viewed in person.

To initiate the in-person signing and viewing process on the eSignature Management page, the financial institution representative clicks **Sign** or **Start**:

- When a party has documents to sign or when a party has documents to sign and documents to view, the **Sign** ✎ Sign button is displayed. Refer to **In-Person Signing** for details.

- When a party only has documents to view, the **Start** → Start button is displayed. Refer to **In-Person Viewing** for details.

Secure Email Delivery

After the documents are signed and/or viewed in person, the eSignature Management page is updated. The **Delivery** button is displayed.

To send the documents for secure remote delivery, perform the following procedure.

1   On the eSignature Management page, click **Delivery**.
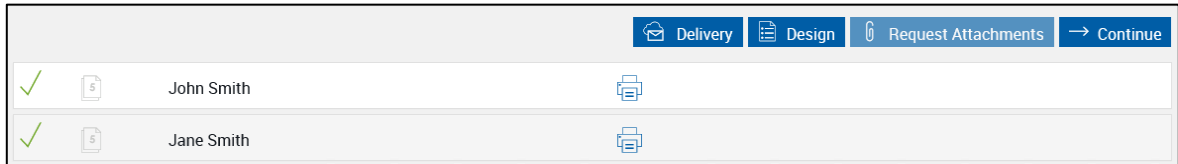
2   Make changes as necessary. Refer to the **Sign Remotely** section on page **162** for details about the page.
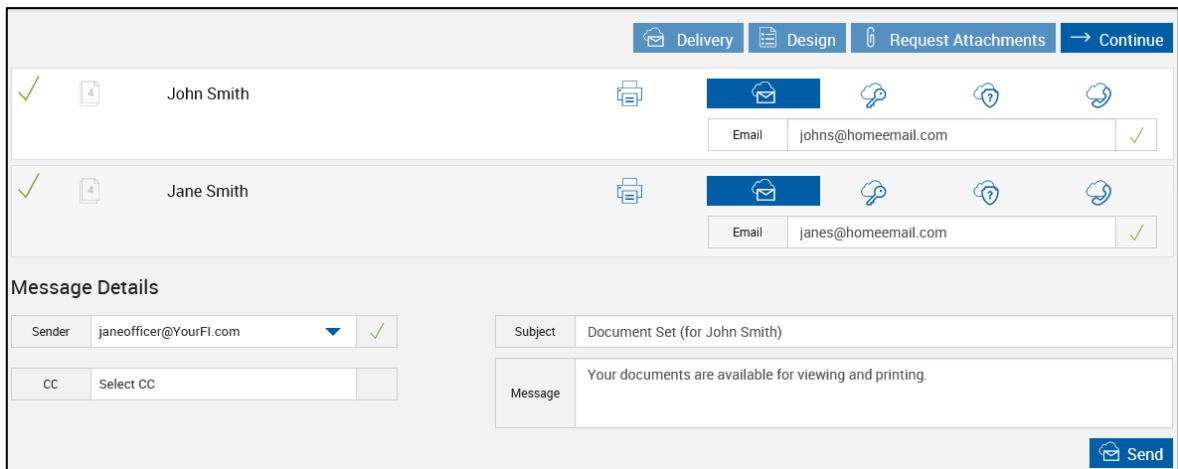
3   When finished, click **Send**. The page refreshes and displays the following message.
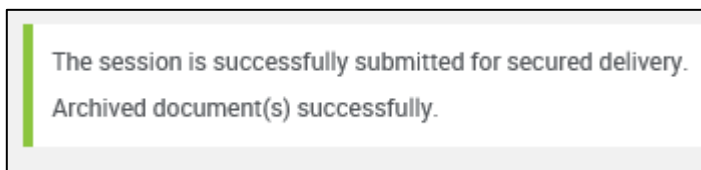
Sign Remotely

When a remote authentication method is selected (Email Authentication, Password Authentication, KBA, or Phone Authentication), the documents will be signed/viewed remotely.

> *i* If the email address that is entered in the Email Authentication, Password Authentication, KBA, or Phone Authentication fields is already registered with Adobe, the party's name that was used to register the email address is displayed during the signing process regardless of the name entered in IMM eSign.

1   **Email Authentication**: The party will receive an email notification. They are instructed to click the "Click here to review and eSign" link to gain access to the documents for signing.

2   **Password Authentication:** The party will receive an email notification. They are instructed to click the "Click here to review and eSign" link. The party is then prompted to enter the Shared Secret Password to gain access to the documents for signing. The password must be at least 8 characters and a mix of lower and upper case letters and numbers.

3   **KBA:** The party will receive an email notification. They are instructed to click the "Click here to review and eSign" link. The party is prompted to enter identity information and answer arbitrary public record questions pertaining to his or her identity. The party's credit history/report is not accessed or impacted when using the KBA authentication service.

4   **Phone Authentication**: The party will receive an email notification. They are instructed to click the "Click here to review and eSign" link. The party is prompted to select the Verification Option (Voice Call or Text Message). A Verification Code will be delivered to the Verification Option method the party selected. The party will enter the Verification Code in the Code field and click **OK** to gain access to the documents for signing.

5   **Sender**: Click the drop-down menu to add or change the email address in the **Sender** field. (Default: Your email address)

6   **CC**: The carbon copy (CC) field appears after the Sender field is filled. Click the drop-down menu to add one or more FI employee emails. The selected FI employees are carbon copied on the email.

7   **Subject**: The **Subject** field is prefilled with the name of the signer of the document set. The content can be changed as needed.

8   **Message**: Fill in the **Message** field. Use the default message that is displayed or change as desired.

9   **Send**: The **Send** button initiates the remote signing process. All in-person signatures and review confirmations must be complete for the **Send** button to be enabled.

Search Completed

The Search Completed Sessions page allows you to access completed sessions. To open the Search Completed Sessions page, click **Processing** > **Search Completed**.

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

To search completed sessions, perform the following procedure:

1. Click **Processing** > **Search Completed.** The Search Completed Sessions page is displayed.

2. Enter search parameters:

   1 **Pin Search Panel**: Clicking in the pin will display ⚲ or collapse ⚲ the search parameters section of the page when the results are displayed.

   2 **Platform**: Search through all available platforms, or click the dropdown to select a single platform to search.

   3 **Date Range**: Click the field to display a calendar and adjust the date range as desired.

   4 **Index Fields Region**: Enter any additional search criteria in the available fields to narrow the search. The search fields displayed are controlled by the administrator.

   5 **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. The display of this field is controlled by the administrator.

   6 **Advanced Search**: Click the Advanced Search button to reveal additional search index fields.

   7 **Indexing**: Select **Indexed** if you would like to display sessions that have been indexed, select **Not Indexed** to display sessions that have not been indexed, or select **All** to display sessions both indexed and not indexed.

   8 **Action Buttons**:

   ▪ Click **Search** to continue.

   ▪ Click **Clear** to reset the search parameters.

3. Click **Search**. The Search Completed Sessions page refreshes with the results for the information requested in the Search Archived Documents.

> ⓘ This page lists all documents in the Archive folder that meet the specified criteria.
>
> If your imaging system has already moved the documents, they will not be listed here.
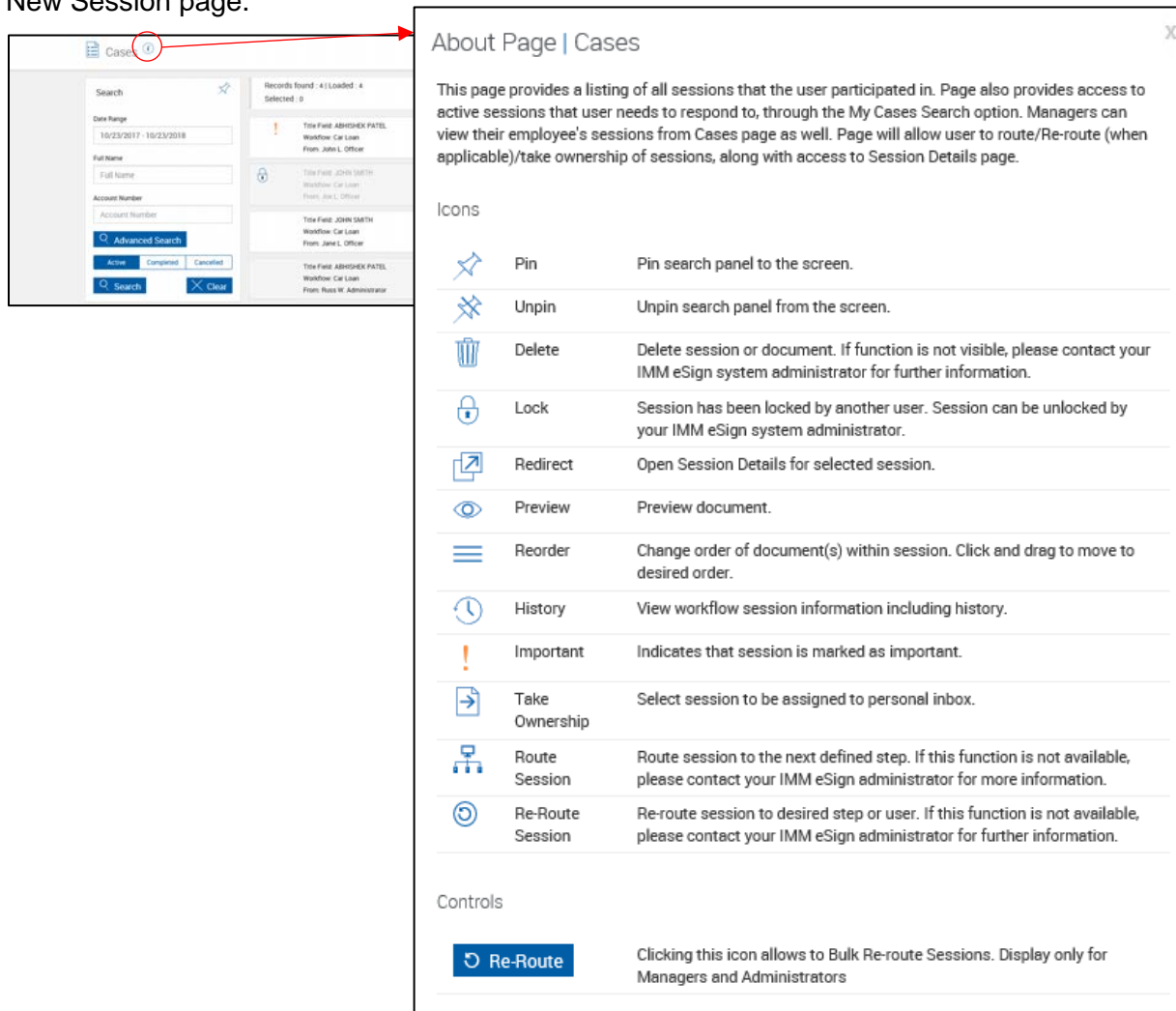
This list can be sorted by clicking on **Column Titles**. Subsequent clicks alternate between ascending and descending order.

4. Click **Clear** to clear the search results and search parameters.

Cases (eSign *plus*)

Click **Processing** > **Cases** to access the Cases page. The Cases page is available for IMM eSign *plus* integrations only. This page contains a list of tasks that a user needs to complete. Click any of the cases in the list to expand the information for that case.

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

Search Panel

1 **Pin Search Panel**: Clicking in the pin will display ✄ or

collapse ✄ the search parameters section of the page
when the results are displayed.

2 **Date Range**: Click the field to display a calendar and
adjust the date range as desired.

3 **Index Fields Region**: Enter any additional search
criteria in the available fields to narrow the search. The
search fields displayed are controlled by the
administrator.

4 **Advanced Search**: Click the **Advanced Search** button
to reveal additional search index fields. If filtering by the
Advanced Search Workflow option, the **Re-Route** button
is displayed on the search results page. Select the
desired cases and click **Re-Route** to reroute multiple
cases at once.

5 **Status Based Filters**: Filters or displays the cases by status: **My Cases**, **Active**,
Completed, or **Cancelled**.

6 **Action Buttons**:

   ▪ Click **Search** to continue.

   ▪ Click **Clear** to reset the search parameters.

Search Results

1 **Search**: Click to pin or unpin the search panel. Refer to **Search Panel** on page **167** for more information.

2 **Sort By**: Click to toggle the sort order to Title Field ASC (ascending order), Title Field DES (descending order), Date Received ASC (ascending order), or Date Received DES (descending order).

3 **Lock**: When this icon is visible, the session is locked by another user. The session can be unlocked by your administrator.

4 **Important**: When this icon is visible, the session is marked as important.

5 **Workflow Case Information:** Provides **Title Field**, **Document Set**, **From, Inbox**, **Step**, **Workflow** name, **Received**, and **Platform**. When the row is clicked, it displays additional information about the workflow case.

6 **Open Session**: When this icon is clicked, you are routed to the Session Details page.

7 **History**: Click the icon to open the History popup to see a detailed history of the case.

8   **Documents Tab**: Click to view a list of the documents for the selected session.

9   **Signature Status Tab**: Click to display details about the signature status of the documents.

10 **Comments Tab**: All of the comments associated with the session are displayed.

11   **Take Ownership**: Take ownership of the session.

12 **Route**: Route the session. Refer to **Routing Documents** on page **74** for details.

13 **Re-Route**: Re-route the session to a desired step or user.

14 **Reorder**: Drag and drop the **Reorder** ☰ icon to change a document's order in the document set.

15 **Document Information:** When this row is clicked in the Documents tab, index information is displayed.

16 **Preview:** Click the **Preview** 👁 icon to view a single document in a PDF popup window. From this window, you can view and print documents. Documents cannot be edited in Preview Mode. Click the icon for the *Document Set* to view all the documents in the set in a PDF popup window. Click the preview icon next to Session Audit to view the audit information for the session. Refer to **Previewing and Printing Documents** on page **24** for more information.

17 **Delete**: Click the **Delete** 🗑 icon to the right of the document name to delete the document from the session. At least one document must remain in the list. Attachments can be removed. See **Deleting a Session** on page **134** for detailed information.

18 **Action Buttons**: Click **Save** to save changes to the indexes in the Documents tab. Click **Cancel** to clear any changes made to the indexes in the Documents tab.

Loan Coupons

Refer to **Processing Loan Coupons** on page **20** for details.

Starter Checks

Refer to **Processing Starter Checks** on page **22** for details.

Custom Links

Click **Processing** > **Custom Links**, and then select a link that has been configured by your administrator. Up to three custom links may be displayed. This feature allows all users to navigate easily to frequently used websites outside of IMM eSign.

Reporting

The following sub-menu choices are available:

Session Status

Expiring Sessions
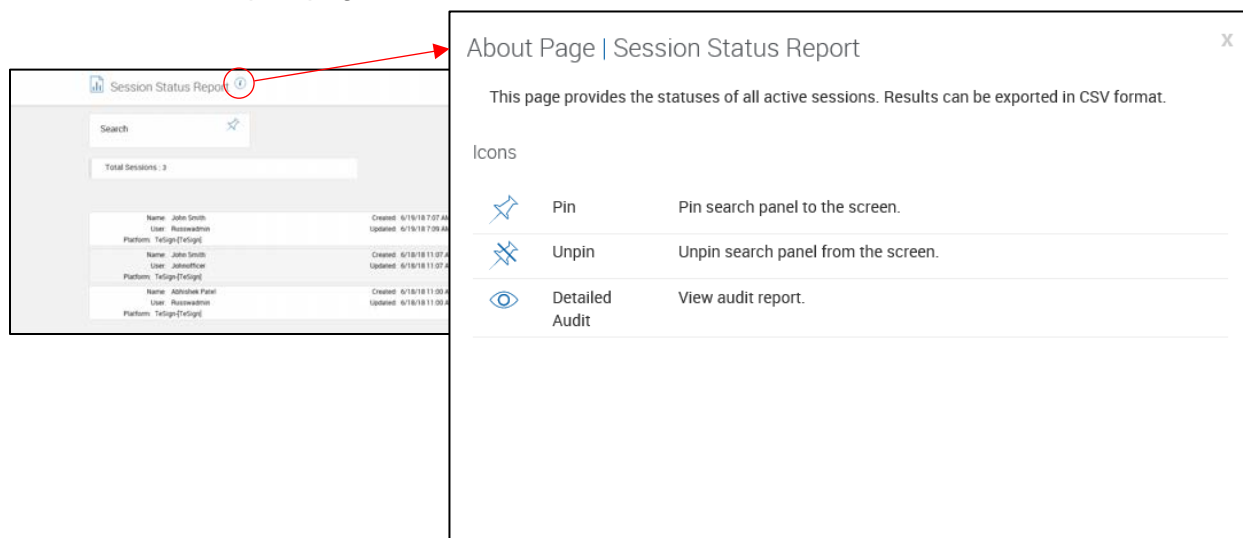
Remote Signature Status

Add-Ons

Session Status

The Session Status Report displays the status of all active sessions. To open the Session Status Report page, click **Reporting** > **Session Status**.

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

To search the status of all processed sessions, perform the following procedure:

1. Click **Reporting** > **Session Status**. The Session Status Report page is displayed.

2. Enter search parameters:
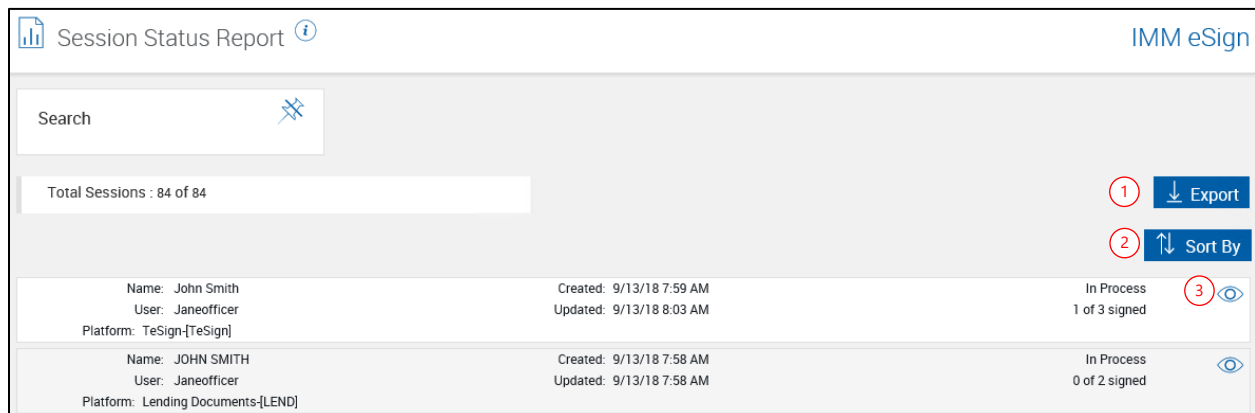
   1 **Pin Search Panel**: Clicking in the pin will display ⚲ or collapse ⚲ the search parameters section of the page when the results are displayed.

   2 **Index Fields Region**: Enter any search criteria in the available fields to narrow the search. The search fields displayed are controlled by the administrator. By default, the Date Range is 360 days.

   3 **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. The display of this field is controlled by the administrator.

   4 **Session Status**: Click the field to search for specific sessions. Choose from the dropdown list. Leave the field blank to search for all session statuses. Click outside the field to close the dropdown list.

   5 **Action Buttons**:

     ▪ Click **Search** to continue.

     ▪ Click **Clear** to reset the search parameters.

3. The Session Status Report search results are displayed.
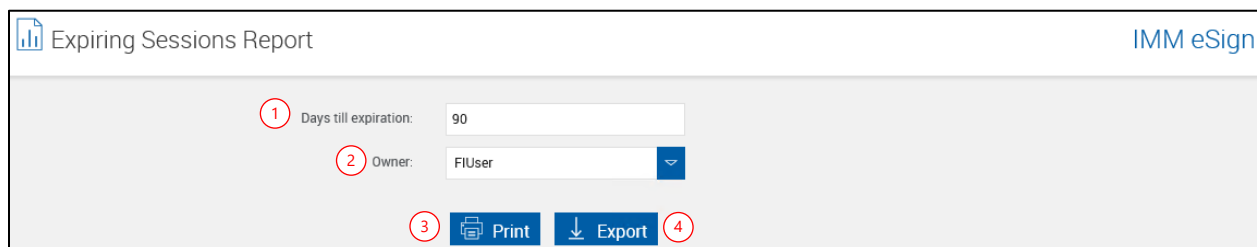
1 **Export**: Export the Session Status Report to a .csv file.

2 **Sort By**: Click the **Sort By** button to choose the order in which the search results will appear (Date Modified Ascending, Date Modified Descending, Name Ascending, Name Descending).

3 **Detailed Audit**: Click the **Detailed Audit** 👁 icon to view the Detailed Audit Report in a PDF popup window.

Expiring Sessions

The Expiring Sessions Report displays active sessions that have not expired.

1. Click **Reporting** > **Expiring Sessions**. The Expiring Sessions Report page is displayed.

2. Enter the search parameters and generate a report:

1 **Days till expiration**: Include sessions with less than this number of days left before expiration. By default, this is set to 90 days.

2 **Owner**: Leave this blank to search documents for all owners or filter the search to include documents from the selected owner only.

3 **Print**: Click **Print** to view the Expiring Sessions Report in a PDF popup window. The report is sorted by Days Left in ascending order.

4 **Export**: Click **Export** to export the Expiring Sessions Report to a .csv file. The report is sorted by Days Left in ascending order.

> ℹ️ If there are more than 2,000 sessions in the report range, a message is displayed stating that the report may take several minutes to generate and asking if you would like to continue or change the **Days till expiration** field.

When the Expiring Sessions Report opens in the PDF popup window, click the printer icon to print the report. A maximum of 10 index fields can be displayed in the report. Refer to the following example.

Remote Signature Status

This report displays the status of all outstanding remote signature sessions. Document sessions that have been completed and cleared by the FI will not display. Completed sessions are listed for up to 14 days. Expired sessions are listed for one year. This report is available only if Remote Signatures is turned on.

Click **Reporting** > **Remote Signature Status**. The Remote Signature Status Report page is displayed.

1   **Pin Search Parameters**: Clicking the Search Parameters bar will expand the search parameters or collapse the search parameters section of the page when the results are displayed.

2   **Exclude Aborted/Expired Sessions**: When this field is selected, sessions that have been aborted or sessions that are expired will not be displayed in the search results.

3   **Include Downloaded Sessions that were submitted in the past # of days**: Limit the listing to include downloaded sets for this number of days. This setting is based on the Date Submitted field and only applies to downloaded documents.

4   **Index Fields Region**: Enter any search criteria in the available fields to narrow the search. The search fields displayed are controlled by the administrator.

5   **User**: 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. The display of this field is controlled by the administrator.

6   **Additional Search Fields**: Add search fields as necessary. To add a search field, select a search field from the dropdown menu and click Add Search Field. The field is displayed with the other index fields.

7   **Action Buttons**:

   ▪ Click **Search** to display the Remote Signature Status Report records.

   ▪ Click **Clear** to reset the search parameters.

8   **Document Set Name**: The name of the document set is listed here.

9   **Signer Info** 👥: Click the icon to display the Signature Status popup. The possible statuses are Waiting for Signature, Pending Other Signers, Remotely Signed, Completed, and Expired.

Email	Status
j....s@homeemail.com	Waiting for Signature
....s@homeemail.com	Pending Other Signers
....s@homeemail.com	Expired

10 **Status**: Current status of the document set based on the signature status.

11 **Date Submitted**: The date the document set was submitted for remote signature. Click the column title to sort the search results by newest or oldest.

12 **Index Fields Region**: These names vary by installation. Click the column title to sort the search results by that field.

13 **Created By**: User ID of the FI representative that created the document or document set. Click the column title to sort the search results by user.

Add-Ons

ℹ️ 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 (by default, 90 days).

Click **Reporting > Add-Ons**. The Add-Ons Report page appears.

1   Select the **Add-On Type** (**Starter Checks** or **Loan Coupons**).
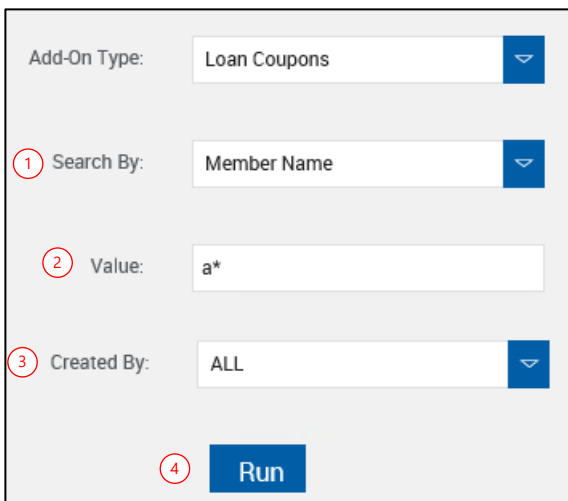
The Add-Ons Report page refreshes.

1   Select a search criteria from the **Search By** dropdown.

2   Enter a search string into the **Value** field. Wildcards are acceptable. The minimum value is the asterisk (*) and one additional character.

3   Select a user for **Created By**.

4   Click **Run**.

The Add-Ons Report lists all activity for that specific search criterion.

Starter Checks Add-On Results

Add-On Type:	Starter Checks	
Search By:	Member Name	
Value:	J*	
Created By:	ALL	

Run

1

Member #	Member/Joint Member	Address	Run Time	Starting #	Checks Printed	Created By
11223344	John Smith, Jane Smith	415 Home Sreet	7/4/2018 1:46:57 PM	1	13	Jane Officer
11223344	John Smith, Jane Smith	415 Home Sreet	9/14/2018 1:46:57 PM	14	27	Jane Officer

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

Loan Coupons Add-On Results

Add-On Type:	Loan Coupons	
Search By:	Member Name	
Value:	a*	
Created By:	ALL	

Run

1

Loan Number	Applicant/CoApplicant	Address	Amount|Due	Last|Pymnt Amt	Period	Run Time	Starting #	Coupons|Printed	Created By
143	Abhishek Patel	645 His Street, Linden, NJ 07036	200.00	200.00	Monthly	9/14/2018 12:31:53 PM	13	12	Janeofficer
143	Abhishek Patel	645 His Street, Linden, NJ 07036	200.00	200.00	Monthly	9/14/2018 12:30:49 PM	1	12	Janeofficer
143	Abhishek Patel	645 His Street, Linden, NJ 07036	200.00	200.00	Monthly	9/14/2018 12:24:27 PM	1	14	Johnofficer
143	Abhishek Patel	645 His Street, Linden, NJ 07036	200.00	200.00	Monthly	9/9/2018 7:25:27 PM	1	25	Johnofficer

Total records available: 4   Sorted by: Run Time (DESC)

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

Help

The Help option provides diagnostics, documentation and general information about your IMM eSign system.

Diagnostics

Documentation

About

Diagnostics

This option allows the user to validate that the system is working properly. The Diagnostics page checks to make sure that the system is able to perform all of the tasks required for the current user and that the proper permission have been set.

Click **Help** > **Diagnostics**. The Diagnostics page is displayed.

Documentation

The FI representative can view the user documentation (this document) in a separate window by selecting this option.

Click **Help** > **Documentation**. This document is displayed in a new window.

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. This information is available to all users.

Click **Help** > **About**. The About page is displayed.

User Name

The user name of the FI representative that is logged in is displayed on the menu. There are two submenus:
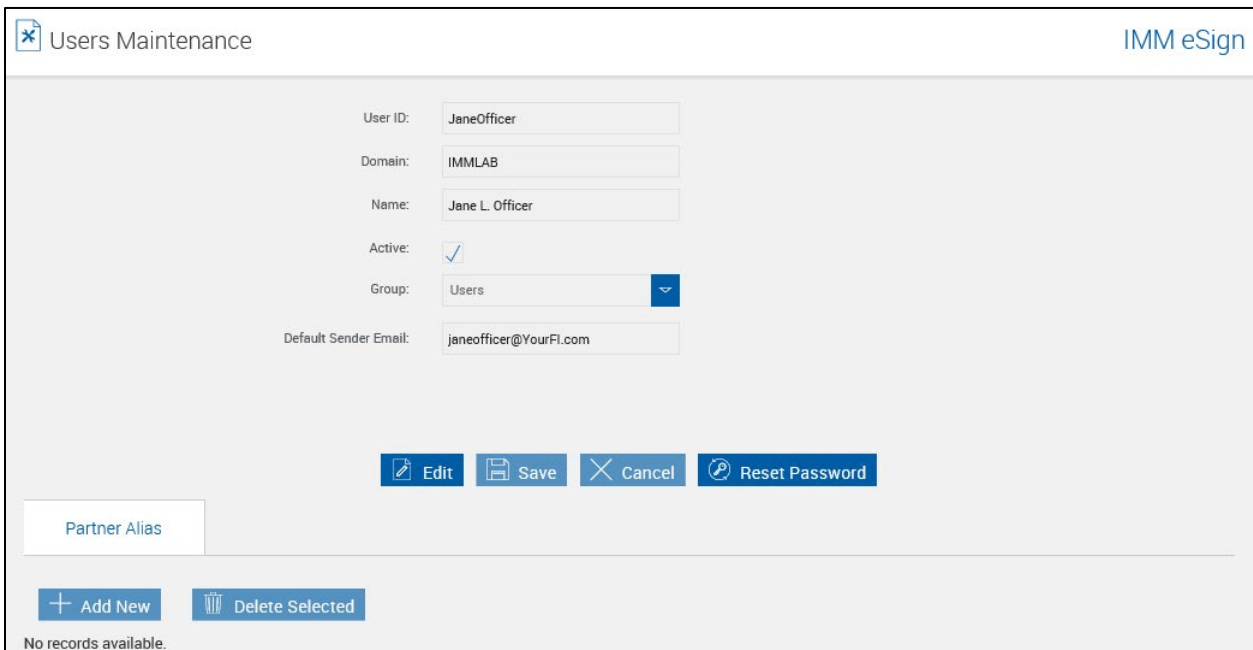
User Account Settings

Workstation Scanner Settings

User Account Settings

This menu allows the user to change the **Name**, **Default Sender Email**, and **Password** fields.

Click **[User Name]** > **User Account Settings**. The Users Maintenance page is displayed.

> ℹ️ User Account Settings may not be available for your logon method.

> ℹ️ The **Partner Alias** area is not functional for your installation.

Edit User Name and Email

1 On the Users Maintenance page, click **Edit**. The page refreshes with only the **Name** and **Default Sender Email** fields unlocked.

2 Edit the **Name** field and **Default Sender Email** field as necessary.

3 Click **Save** to save the changes.

Click **Cancel** to exit without saving.

Reset Password

1   On the Users Maintenance page, click **Reset Password**. The page refreshes.
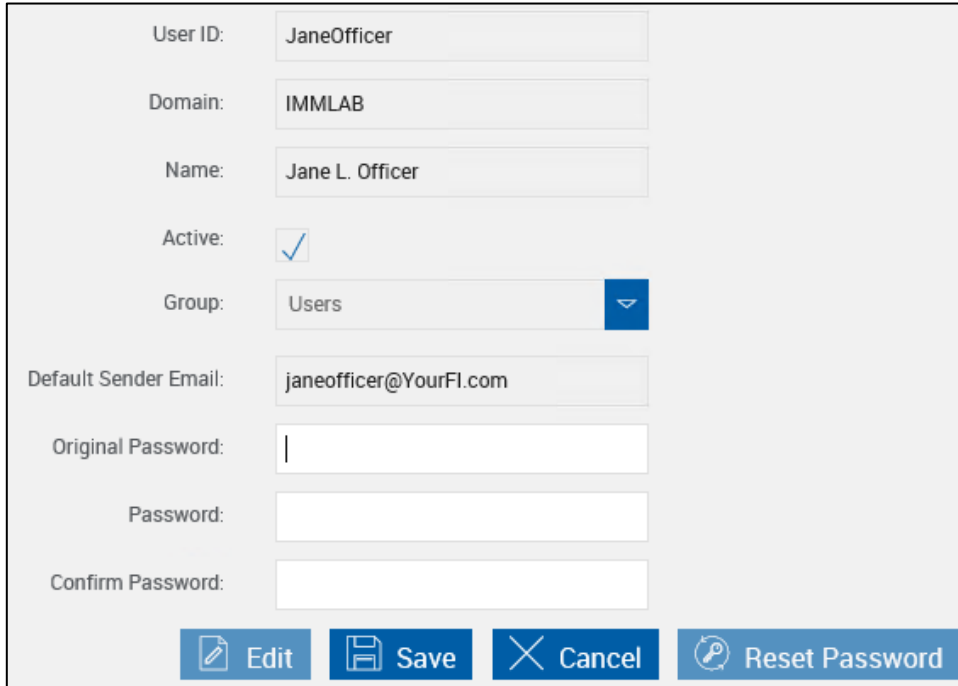
User ID:	JaneOfficer
Domain:	IMMLAB
Name:	Jane L. Officer
Active:	✓
Group:	Users ▾
Default Sender Email:	janeofficer@YourFI.com
Original Password:	|
Password:	
Confirm Password:	

✏ Edit   💾 Save   ✕ Cancel   🔑 Reset Password

2   Complete the following fields:

- **Original Password**: Enter the password currently being used by the user to connect to eSign.

- **Password**: Enter the new password.

- **Confirm Password**: Reenter the new password

> ℹ 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.

3   Click **Save** to save the changes. The Users Maintenance page refreshes and the new password is saved.

Click **Cancel** to exit without saving.

Workstation Scanner Settings

> The availability of the Workstation Scanner Settings menu is controlled by your Administrator. Your settings may differ from the ones displayed in this section depending on the Administrator settings.

This menu allows you to edit workstation scanner settings.

1   Click **[User Name]** > **Workstation Scanner Settings**.

> If this popup displays, click **Install**.
>
> This website wants to install the following add-on: 'DynamicWebTWAIN' from 'DynamSoft Corporation'.   What's the risk?   Install   ×

2   The Edit Scanner Settings - Workstation page is displayed.

1   Select a scanner from the dropdown menu.

2   Change settings as necessary for your configuration.

> ⓘ   The availability of scanner settings selections is dependent on your scanner.
>
> IMM does not recommend enabling the Show UI setting.
>
> High definition and large area scans will result in large file sizes.

3   Click **Test** to verify the settings.

4   Click **Save Settings** to save the workstation scanner settings.

5   Click **Download eSign Scanner Service** 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 sav and then installed as an Administrator.

Logout

Click **Logout** to end the session.

IMM eSign Icon

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

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

[icon] 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.

[icon] 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.

[icon] 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.

[icon] 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 ([icon]) in the system tray, a popup menu is displayed.

IMM eSign Integrations   IMM eSign *plus* Integrations

Show Documents
Settings
Exceptions (1)
Search Active Sessions
Search Completed Sessions
State
About
Exit

Show Documents
Settings
Exceptions (2)
Cases
State
About
Exit
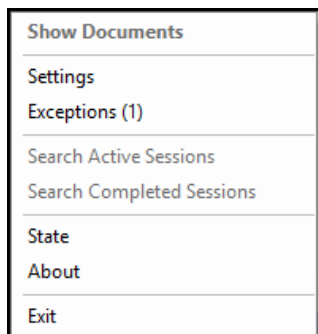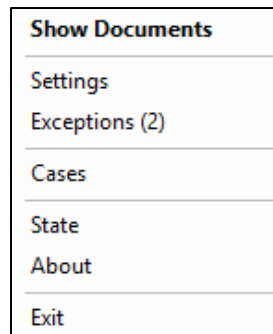
The following choices are available depending on your integration:

- **Show Documents**: Selecting this option displays the Documents List page. Refer to **Manual Output Folder** on page 11 for details.

- **Settings**: This option is for Administrator use only. Refer to the **Client Installation Guide** for more information on these settings.

- **Exceptions**: This option allows 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.

  o Click **Process** to reprocess the document.

  o Click **View Log** to view the error log for the document.

  o Click **OK** to close the Exceptions window.
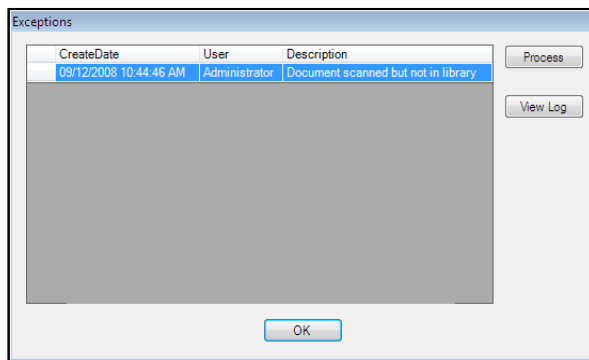
- **Search Active Sessions**: This option allows the user to find sessions that have been previously saved on the server. When selected, the Search Active Sessions page opens. Refer to **Search Active** on page 144 for details.

- **Search Completed Sessions**: This option allows 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** on page 164 for details.

- **Cases**: This option allows the IMM eSign *plus* users to navigate directly to the Cases page. This page contains a list of tasks that a user needs to complete. Refer to **Cases (eSign plus)** on page 166 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.

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

Search Hints

On some menus you can search for documents, completed documents or active session documents. You may be able to search for customer name, customer number, or other items.

You can use wildcard characters to find documents 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.

Calendars

Start/End Date

In the Start Date and End Date fields, click the Calendar button (). The **Calendar** popup is displayed.

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

Click the day of the month. The calendar closes automatically when the date is selected.

Click the Calendar button again to close the popup without changing the date.

<		March 2014				>
S	**M**	**T**	**W**	**T**	**F**	**S**
23	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

Date Range

In the **Date Range** field, click the text box. The Calendar popup is displayed.
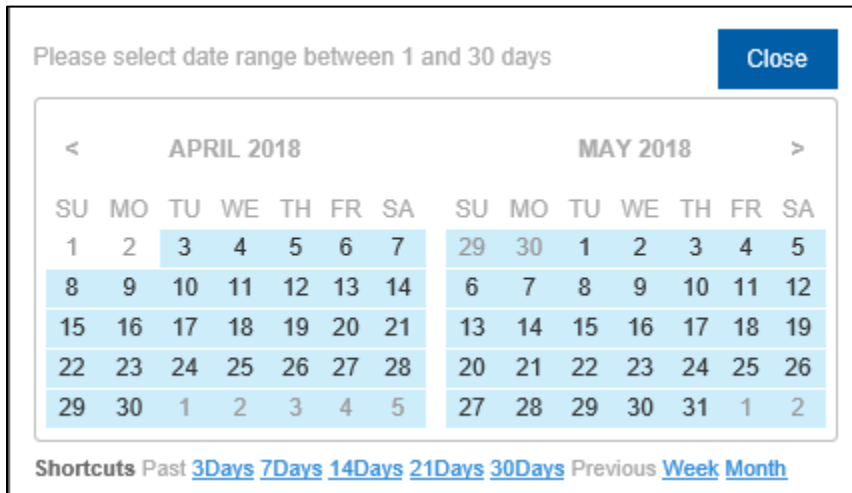
Use the < and > buttons to select the month and year.

Click the start day and then the end day. The range is highlighted in blue. The calendar closes automatically when the date range is selected.

Using an iPad

> ℹ️ After using IMM eSign on an iPad, it is important to log out and to close the browser for security.

When using an iPad, many of the functions are the same as using a PC. To get started with IMM eSign on an iPad, refer to the following sections:

- To save the IMM eSign URL as a favorite, refer to **Save the IMM eSign URL as a Favorite** on page **189** for details.

- Log in following the **Logging In** section on page **9**.

- After logging in, the Search Active Sessions page is displayed. Refer to **Search Active** on page **144** for more information.

- The iPad does not display the same menu items that a PC does. Refer to **IMM eSign Menus on an iPad** on page **189** for an overview of the menu items that are displayed when using an iPad.

- Log out by clicking the Logout menu, and then close the web browser. Refer to **Logout** on page **183** for details on the Logout menu.

IMM eSign Menus on an iPad

The iPad displays three IMM eSign menu items:

- **Processing**

  o **Search Active**: Click this menu item to search for active sessions. Refer to **Search Active** on page **144** for more information.

  o **Search Completed**: Click this menu item to search for completed sessions. Refer to **Search Completed** on page **164** for details.

  o **Loan Coupons**: Click this menu item to access the Add-Ons Processing page. Refer to **Processing Add-Ons** on page **20** for details.

  o **Starter Checks**: Click this menu item to access the Add-Ons Processing page. Refer to **Processing Add-Ons** on page **20** for details.

- **User Name**: This item displays the name of the user. Clicking this item does not route you to another page.

- **Logout**: Click this menu item to log out of IMM eSign. Close the browser after logging out. Refer to **Logout** on page **183** for general information.

Save the IMM eSign URL as a Favorite

Instead of manually entering the IMM eSign URL on the iPad every time you need to access IMM eSign, you can save the URL by adding it as a favorite on an iPad. To save the IMM eSign URL as a favorite on an iPad, perform the following procedure:

1. In the Safari web browser, navigate to *http://[YourServer]/teaasp/Login.aspx*.

2. If prompted, perform the following action depending on your authentication settings:

   - For Windows Authentication, enter your domain\username and password to log in.

- For Anonymous Authentication, enter your local user account credentials to log in.

> ℹ️ For Anonymous Authentication, FIAdmin may have to reset all auto-create user passwords in IMM eSign.

3. On the Login Screen page, tap the **Action** ⬆️ button and then click **Add to Favorites**.
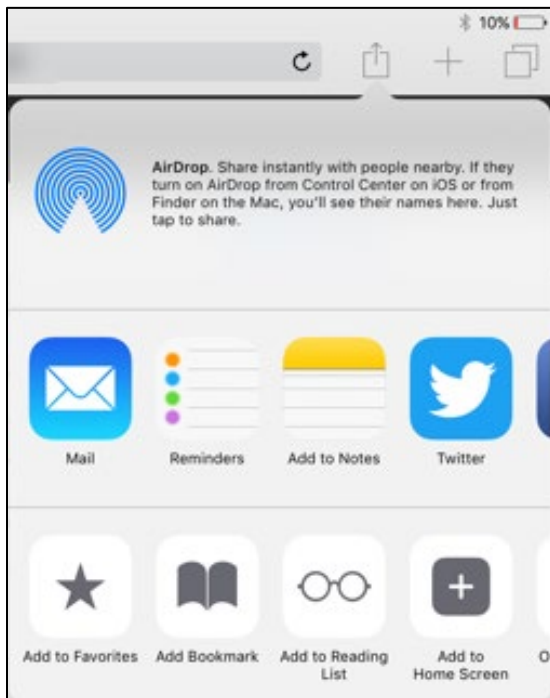
4. In the Add to Favorites window, enter a title such as "IMM eSign Login." The URL is displayed below the title.
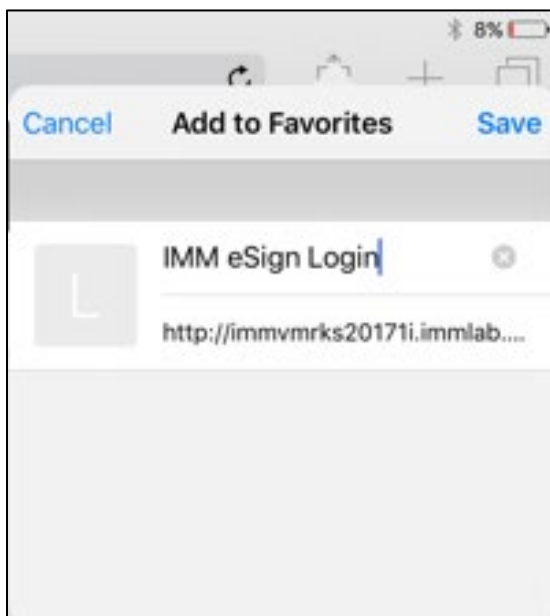
5. Click **Save**. The IMM eSign URL is added as a favorite.

6. After the favorite is created, open IMM eSign using the URL field or the **Bookmarks**
    📖 button:

• To use the URL field, tap the URL field and then tap the icon that represents IMM eSign
   (e.g., "IMM eSign Login").
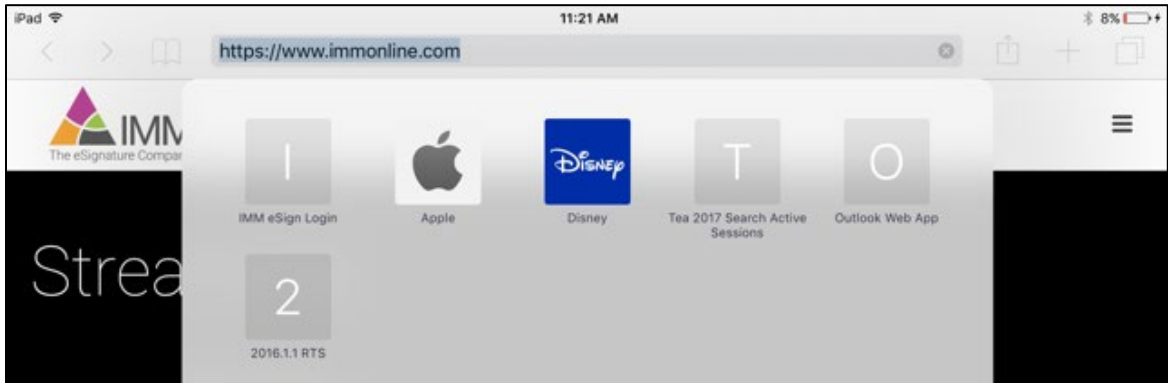
• To use the **Bookmarks** 📖 button, tap the **Bookmarks** 📖 button, tap **Favorites**,
   and then tap the name that represents IMM eSign (e.g., "IMM eSign Login").
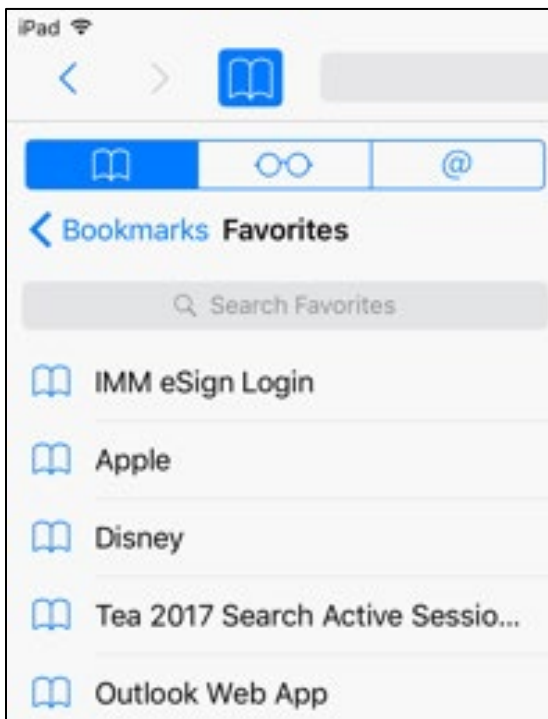
Refer to **Logging In** on page **9** to continue the login process.

Document Administrator Supplement

Overview

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

Groups and Users - Roles and Responsibilities

The following groups and users are automatically created when IMM eSign is installed:

Groups

- **Users**: Created in IMM eSign by the FI Admin. Able to process documents, save and retrieve sessions, archive documents and search archived documents and saved sessions. The FIUser is a member of the Users group.

- **DocumentAdmins**: Same rights as Users plus able to define and maintain documents. The DocAdmin is a member of the Document Admins Group.

- **Administrators**: All rights of Users and DocumentAdmins plus able to control all FI-level settings. The FIAdmin is a member of the Administrators group.

Users

- **FIUser**: Able to process documents, save and retrieve sessions, archive documents and search archived documents and saved sessions.

- **DocAdmin**: Same rights as Users plus able to define and maintain documents.

- **FIAdmin**: All rights of Users and DocumentAdmins plus able to control all FI-level settings.

- **HostAdmin**: The ability to control Host-level settings, such as enable Add-ons, maintain Financial Institution (FI) settings, and modify service level.

DocAdmin Menus

After the DocAdmin (Document Administrator) logs in, the Search Active Sessions page is displayed. Use the menu bar on the upper right-hand side of this screen to perform document administrator duties for your financial institution. The User ID displays in the upper right corner.
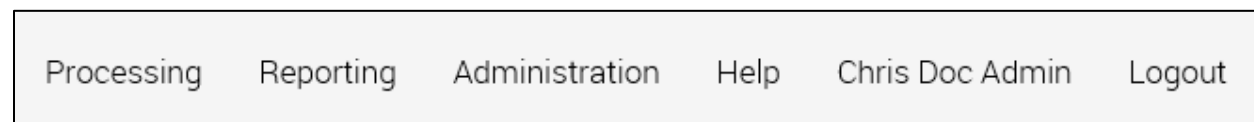
The following sections describe the DocAdmin menu options available along with brief descriptions of their functionality:

Processing - Same functions as a user

Reporting - Same functions as a user

Administration - Functions specific to the Document Administrator (DocAdmin)

Help - Same functions as a user

User Name - Same functions as a user

Logout - Same functions as a user

Administration

The following sub-menu choices are available for the DocAdmin from the Administration menu:

Documents (XML)

Documents (RTS)

Document Sets

Workflow Builder

Criteria (XML Only)

Remote Attachment Template

Documents (XML)

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**.

The Document Maintenance page is displayed.

Document Maintenance Page - No Documents

Document Maintenance Page - Populated

1   **Search by**: A search filter is available to assist in locating your documents. Refer to **Search (for Documents)** on page 202 for more information.

2   **Document Maintenance Action Buttons**:

- **Upload Documents**: Upload documents. Existing documents with the same name will be overwritten. Refer to **Uploading Documents** on page 195 for more information.

- **Delete Selected**: Delete selected documents. Refer to **Deleting Documents** on page 201 for more information.

- **Define Attachment**: Define an attachment category. Refer to **Attach Documents** on page 198 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 203 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 203 for more information.

8   **Criteria**: Select any required criteria. Refer to Criteria (XML Only) on page **224** for more information. (Locked for Imported Documents)

9 **Recurring Type**: *None, Recurring or NonRecurring*. Refer to **Recurring Forms Guidelines** on page 205 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 eSign Lite 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
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 eSign Lite installations)

14 **Attachment**: Documents that have this box *checked* are additional documents that may be included with document sets. Refer to **Attach Documents** on page 198 for more information. (Not available for eSign Lite installations)

15 **Vendor:** Select the supported third party from the dropdown so that the signature fields in third-party documents are automatically recognized.

Uploading Documents

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

1 From the Document Maintenance page, click **Upload Documents**.
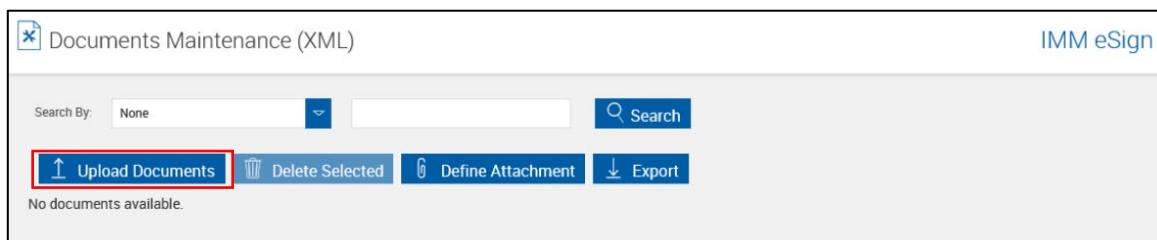
2   The Upload Documents page is displayed.
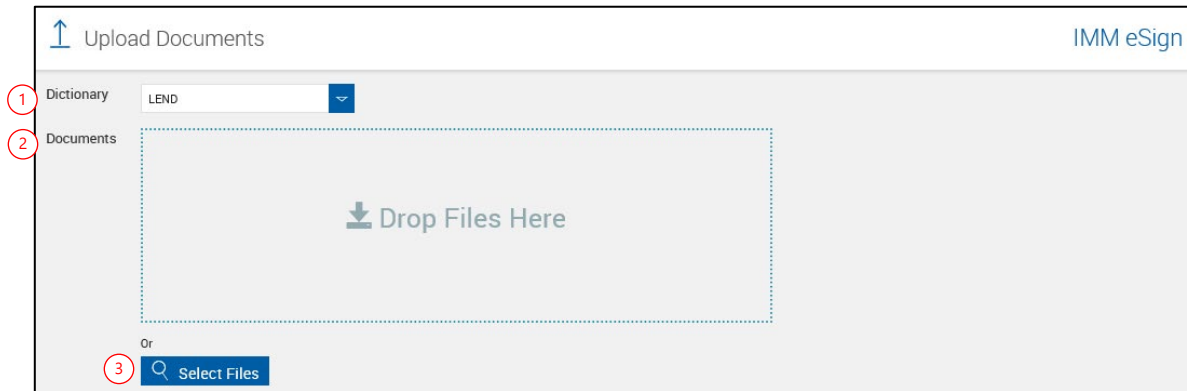
1   **Dictionary**: Select a Dictionary from the drop-down.

2   **Drop Files Here**: Drag and drop existing PDF documents.

3   **Select Files**: Navigate to and select the directory with your documents. Select one or more documents to upload. Click **Open**.

3   The Upload Documents page refreshes.
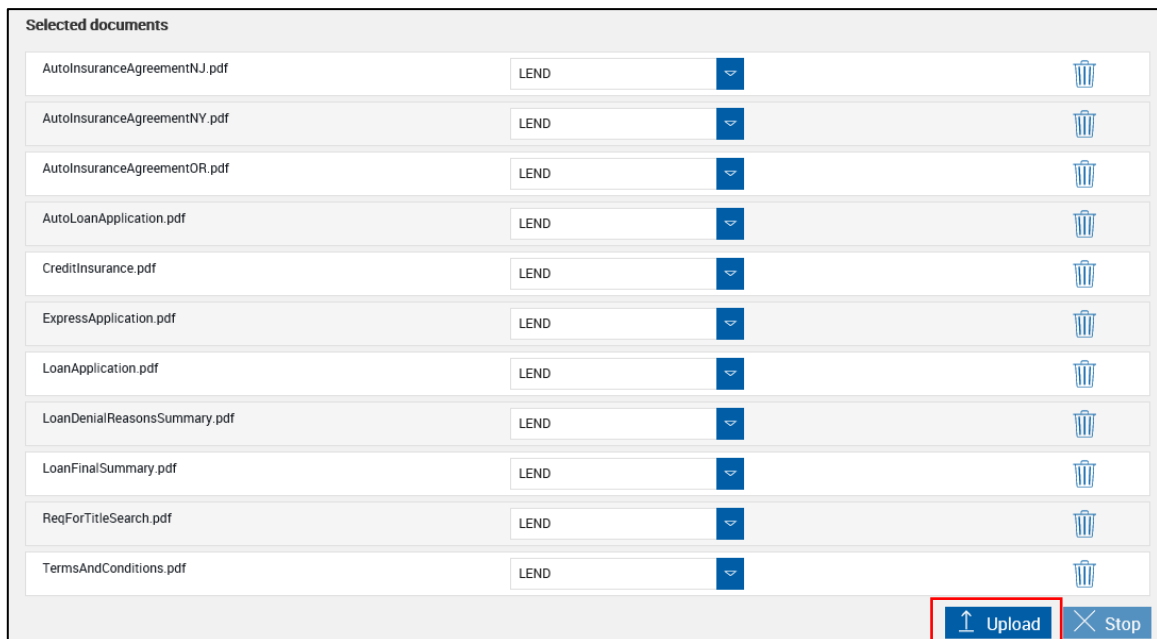
Click **Upload**.

4 The Open window is displayed.

Navigate to and select the directory with your documents.

Select one or more documents to upload.

> ℹ️ Press Ctrl-A to select all files.

Click **Open**.

> ℹ️ **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-Document-Name.pdf" | Valid name | Dashes are allowed |
> | "YourDocumentName.pdf" | Valid name | Uses no special characters |

5 The Upload Documents window refreshes.

6 Successfully uploaded documents will display a checkmark.

Failed uploads will display a red X.

Selected documents		
AutoInsuranceAgreementNJ.pdf	LEND	✓
AutoInsuranceAgreementNY.pdf	LEND	✓
AutoInsuranceAgreementOR.pdf	LEND	✓
AutoLoanApplication.pdf	LEND	✓
CreditInsurance.pdf	LEND	✓
ExpressApplication.pdf	LEND	✓
LoanApplication.pdf	LEND	✖
LoanDenialReasonsSummary.pdf	LEND	✓
LoanFinalSummary.pdf	LEND	✓

Click the document row for more information.

7 **Failed upload explanation**

LoanApplication.pdf	LEND	✖
Document entry already present for the FI under a different dictionary. DictName = TeSign HostSystemId = IMM		

8 Repeat steps 1-5 for any additional dictionaries.

9 The Document Upload process is complete.

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

10 After documents have been uploaded, edit document field information as necessary.

As necessary, add documents to Document Sets. Refer to **Document Sets (XML** Only) on page **216**.

Attach Documents

> ℹ Not available for eSign Lite 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 third parties may also be uploaded 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**.
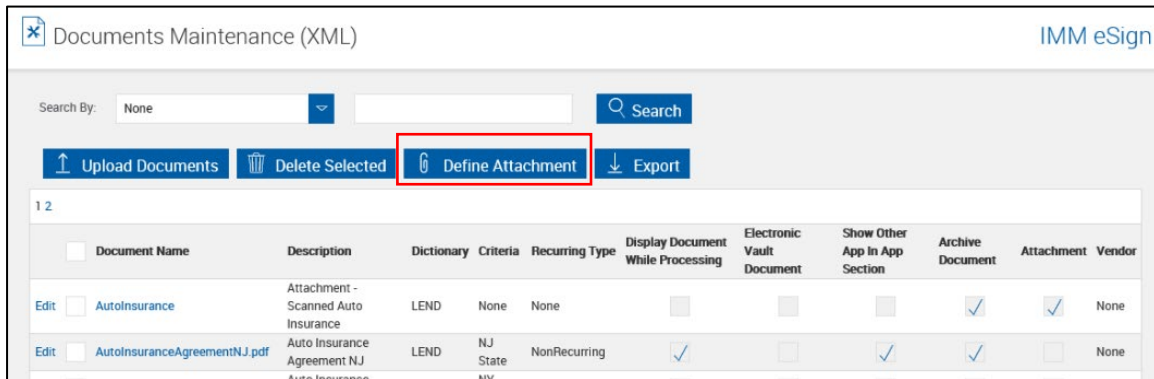
2   A new row is displayed.

	Document Name	Description	Dictionary	Criteria	Recurring Type	Display Document While Processing	Electronic Vault Document	Show Other App In App Section	Archive Document	Attachment	Vendor	
Update Cancel ☐	DriversLicenseLending ①	Driver's License Lending ②	LEND ③ ▽	None ▽	None ▽	☐	☐	☐	✓ ④	✓ ⑤	None ⑥ ▽
Edit ☐	AutoInsurance	Attachment - Scanned Auto Insurance	LEND	None	None	☐	☐	☐	✓	✓	None

The following information can be modified for an attached document:

1   **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.

User's Attach Documents Popup

Add Documents

| Library | **Attach** | Scan | Photo |

Attachment Type

| | ▲ |

AutoInsurance

DriversLicense

DriversLicenseLending

GAPInsuranceAgreement

GAPInsuranceG10240

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

2   **Description**: A description of the document. "Attachment" will automatically be prefixed to the description when **Update** is clicked.

3   **Dictionary**: Select a dictionary from the dropdown.

4   **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]

5   **Attachment**: The Attachment checkbox is automatically checked.

6   **Vendor**: Where applicable, the name of the third party supplying this type of attachment.

Click **Update** to save the information.

The Attach Document is added to the document list.

Deleting Documents

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

From the Document Maintenance page,

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.
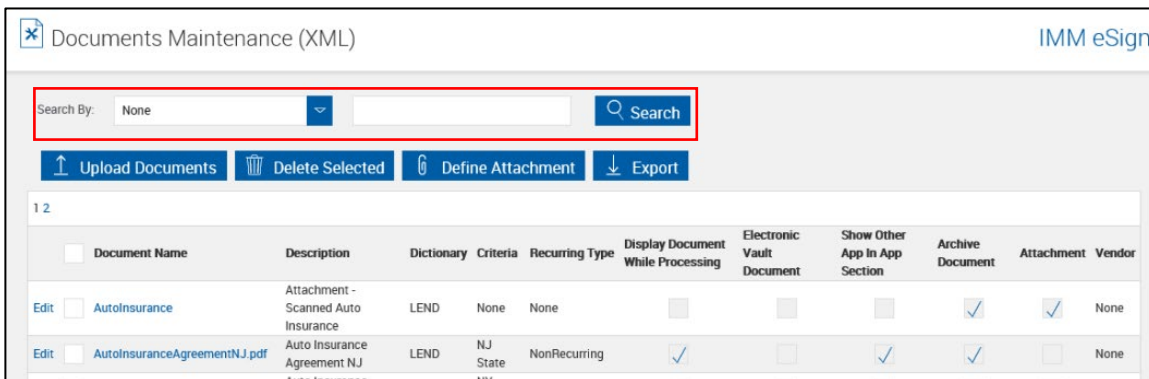
- Select the **Search By** drop-down field.

  - o **None**: After completing a search, select **None** and click **Search** to view all documents.

  - o **Document Name**: This will search for all documents matching the search parameter.

  - o **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,
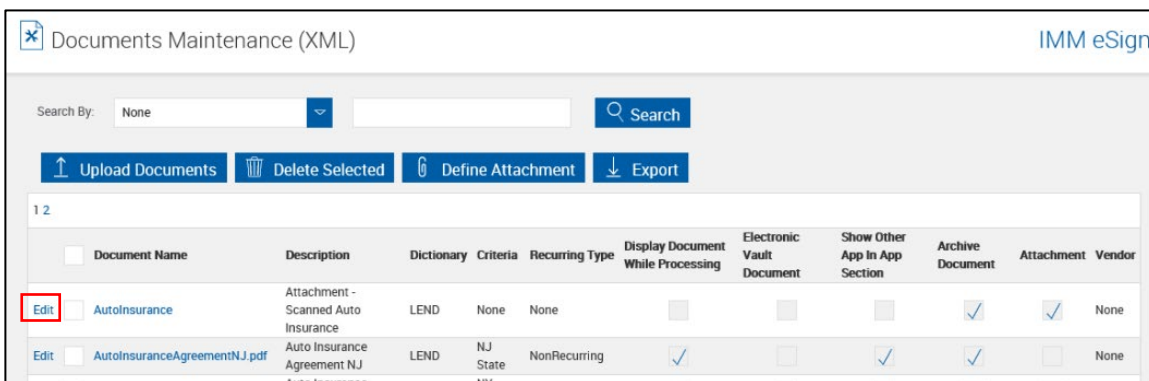
Click **Edit** to the left of the document name.

The Document Maintenance page refreshes with the document fields unlocked.

Edit the document field information as necessary.

Click **Update**.

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Edit (Documents) (Alternate Method)

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

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 193 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 <u>locked</u> by default. Use this settings to unlock those fields.
• All HOST fields which are blank (have no value) in the XML source will remain <u>open</u> prior to signing.
• All GENERIC (non-XML) fields will remain <u>open</u> prior to signing.
• If all signers sign the session successfully, all fields will be <u>locked</u> 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.
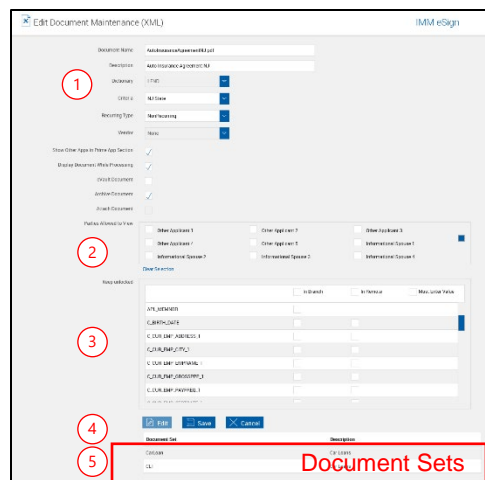
After completing changes,

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:

  o **Primary Applicant**: The field label for this group is A_ or P_.

  o **Spouse**: The field label for this group is C_.

  o **Co-applicant/Other Applicant**: The field label for this group is O_ (O1, O2, etc.)

  o **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 *(Lending Dictionary - Optional)*	**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 *(Lending Dictionary - Optional)*	**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 *(Lending and Membership Dictionaries - Mandatory)*	**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.
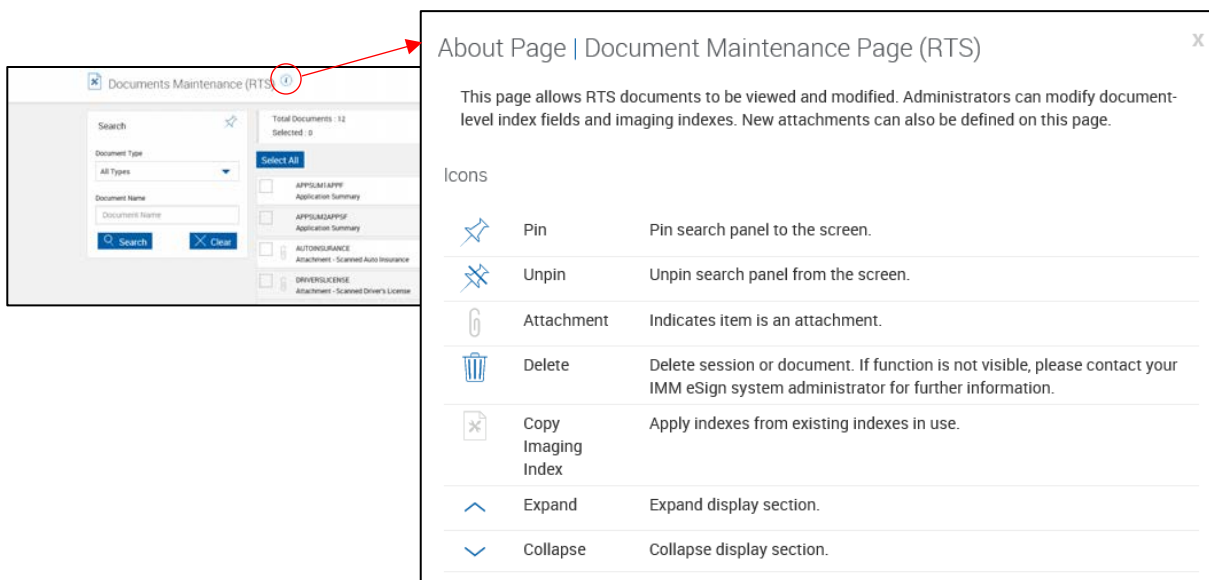
Document Mapping	Behavior	Result
Primary (A_) Spouse (C_)	None	**Document 1** – Primary and Spouse (A_ and C_)
Primary (A_) Spouse (C) Co-applicant/ Other Applicant (O1_)	None	**Document 1** – Primary, Spouse (A_ and C_), and Co-applicant/Other Applicant (O1_)
Primary (A_) Spouse (C) Co-applicant/ Other Applicant (O1_) Guarantor (G1_)	None	**Document 1** – Primary, Spouse, and Co-applicant/Other Applicant (A_, C_, and O1_) **Document 2** – Guarantor (G1_) *In this case, the Guarantor (G1_) is the applicant that is particular to the "applicant-specific" document.*

Documents (RTS)

This page may not display for your installation.

Click **Administration > Documents (RTS)** to access the Documents Maintenance (RTS) page. 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.

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

Default View

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

2   **Pin/Unpin**: Clicking in the pin will 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.

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 **214** 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 View

Details Tab

1 **Full Name**: The *Full Name* is *used in indexing* and defaults to the current filename, but can be modified at this point. (90 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. (140 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 **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.*)

6 **Results Pane Action Buttons**:

- **Save**: Click this button to save changes to a document.
- **Cancel**: Click to cancel changes to a document.

Index Fields Tab

Only fields that have been marked by your administrator as "*Use for Imaging*" are available on this screen. Additionally, if your system uses XML files with field definitions, those defined fields will appear here.

Imaging System Tab

This screen changes according to the currently selected Imaging System. Refer to the Imaging Index Service Admin Guide for detailed information.

Define Attachment

> *i*   This procedure only applies to installations that do not use AIM.

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 third parties may also be added as attachments.

Refer to **Adding Documents** on page **60** when processing document sets.

> *i*   Encrypted PDF documents cannot be attached.
>
> Attached documents must be less than 5 MB in size.
>
> A maximum of 10 documents can be attached per session.
>
> A maximum of 100 document pages can be attached when the session will be sent for remote signatures.
>
> Supported file formats are BMP, GIF, JPEG, JPG, PDF, PNG, TIF, and TIFF.
>
> Attachments will be downloaded as PDF documents. All attachments will be converted to PDF documents and saved as separate files.

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

After clicking **Define Attachment** on the Document Maintenance page, the Define Attachment popup is displayed.

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. (90 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. (140 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 third party supplying this type of attachment.

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.

>   Indexes must be defined for attachments using the Index Fields tab.

Document Sets (XML Only)

Click **Administration > Document Sets**.

The Document Sets Maintenance feature allows the Document Administrator to group related 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 or not they will display, how many copies need to be printed, whether the document is required, and the recurrence type).
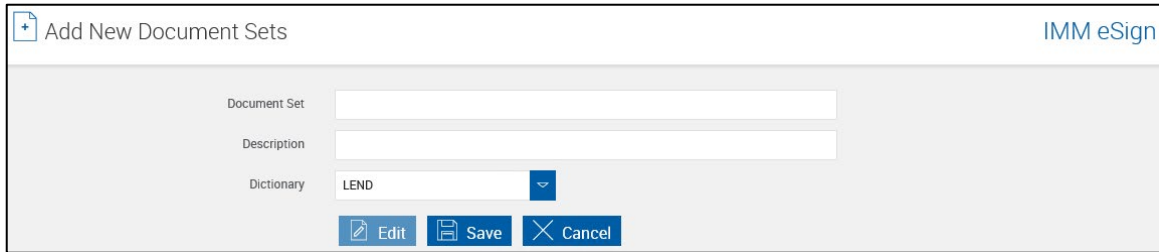
Add Document Sets

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

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 Add New Document Sets page refreshes showing available documents from the selected dictionary.

Document Set	CCReq	
Description	Credit Card Request	
Dictionary	MBR ▽	

✎ Edit   💾 Save   ✕ Cancel

Documents   **Add Documents**

➕ Add Selected Documents   Document Name: [_____]   🔍 Search

1

	Document Name	Document Description	Required	Display Document While Processing	Recurring Type	Show Other App In App Section	Archive Document
☑	CreditCardApplicationAXC000.pdf	Credit Card Application AXC000	False	False	None	True	True
☐	eSignAccountChangeCard.pdf	Account Change Card eSign	False	True	None	True	True
☐	MembAppAndAcctCard2015-3.pdf	Membership Application and Account Card 2015-3	False	False	None	True	True

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

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.

Document Set	CCReq	
Description	Credit Card Request	
Dictionary	MBR ▽	

✎ Edit   💾 Save   ✕ Cancel

Documents   **Add Documents**

🗑 Delete Selected

1

Edit		Document Name	Document Description	Required	# Print Copies	Recurring Type	Display Document While Processing	Show Other App In App Section	Archive Document	Sort Order	
Edit	☐	CreditCardApplicationAXC000.pdf	Credit Card Application AXC000	☐	1	None	☐	✓	✓	⌃	⌄
Edit	☐	eSignAccountChangeCard.pdf	Account Change Card eSign	☐	1	None	✓	✓	✓	⌃	⌄

Displaying Documents: 1 through 2. Total Documents available: 2

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 220 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.

- D**ictionary**: 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.

		Document Set	Description	Dictionary
Edit		CarLoan	Car Loans	LEND
Edit		CCReq	Credit Card Request	MBR
Edit		CL1	Car Loans	LEND
Edit		Mort1	Mortgages	LEND
Edit		NM1	New Members	MBR
Edit		Test_Set	This is a test.	LEND

Displaying Document Sets: 1 through 6. Total Document Sets available: 6

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.

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 ⌄ 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.

> ℹ️ Display Document While Processing cannot be edited on this page. This is a document-only setting. Refer to **Display Document While Processing** on page 195 for more information.

Delete Document Sets

Delete the document sets from the Document Sets Maintenance page:

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 for IMM eSign *plus* integrations. 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.

Workflow Builder		IMM eSign
Actions... ⌄ ○ Published Version ● In Development		
Workflow Name	**Version**	
○ Car Loan	1. 0. 4	

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.
  - o **Create Workflow**: Used to design a new workflow.
  - o **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.
  - o **Publish Workflow**: Moves the workflow into the Published Version screen. The published version will be incremented.
  - o **Copy Workflow**: Creates a copy of an existing workflow.
  - o **Delete Workflow**: Removes a workflow.

    > *i* In Development workflows can be deleted.
    >
    > Published workflows cannot be deleted if there are in-work tasks associated with the workflow.

  - o **Import Workflow**: Imports a workflow from a different Financial Institution from an XML file.
  - o **Export Workflow**: Exports a workflow to an XML file.
  - o **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 workflows that are being worked on.

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.

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 with Workflow Administrator permissions.

Click **Administration > Workflow Builder**.

Import the Master Workflow

1. Select **Import Workflow** from the **Actions** dropdown.

2. Browse to the *Workflow.xml* and click **Import**.

3. Select **Yes** to add the shared inboxes.

4. Click **OK** on the Imported Successfully message prompt.

5. Refresh the webpage.

Publish the Master Workflow

1. Click the **In Development** radio button.

2. Select the **Master Workflow** radio button.

3. Select **Publish Workflow** from the **Actions** dropdown.

4. Enter comments and **Save**.

Copy the Master Workflow

1. Click the **Published Version** radio button.

2. Select the **Master Workflow** radio button.

3. Select **Copy Workflow** from the **Actions** dropdown.

4. Edit the **Workflow Name** and **Description** then click **Save** (indicate a name that will be published for production use).

5. 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.

Criteria (XML Only)

🛑 Please Contact IMM Support 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
Edit		Home Loan	//*['//*[LNPURP_DESC='Home Loan']	Only used for Home Loans
Edit		NJ State	//*[P_PRI_ADDR_STATE='NJ']	New Jersey State
		None		Default Criteria
Edit		NY State	//*[P_PRI_ADDR_STATE='NY']	New York State
Edit		OR State	//*[P_PRI_ADDR_STATE='OR']	Oregon State

Criteria Maintenance — IMM eSign

+ Add Criteria   🗑 Delete Selected

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

Criteria Reference Material

Criteria conditions in IMM eSign can be any valid XPath expression. IMM eSign 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:

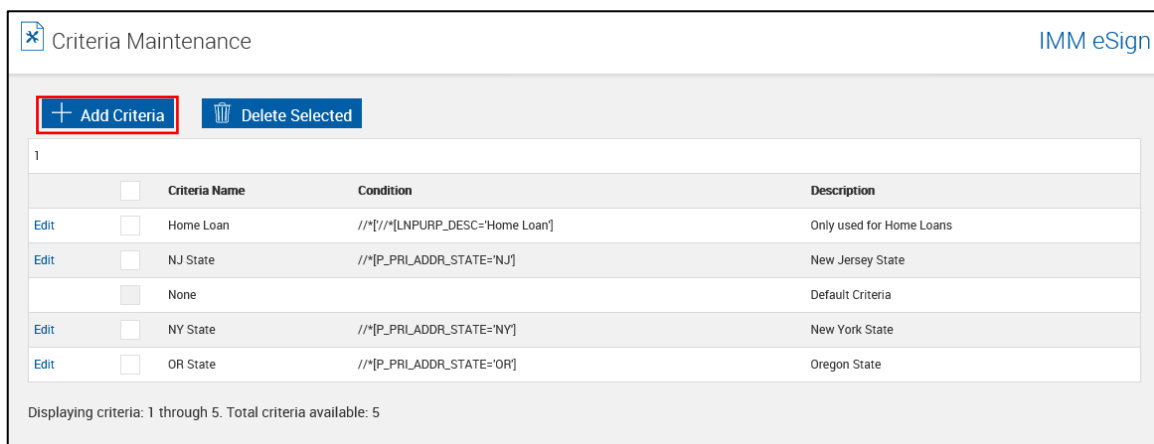Connectors are case-sensitive. Use "or" and "and", not "OR" and "AND"

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

1 From the Criteria Maintenance page,

Click **Add Criteria**.

2   A new line opens.

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 Maintenance page, click **Edit** next to the document to be edited.

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

- **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,

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**.

Remote Attachment Template

> Remote attachment definitions must previously be created in AIM, on the Documents (XML) page, or the Documents (RTS) page.

> IMM eSign Remote must be activated to view this page.

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

The Remote Attachment Template can be applied to any or all individual document signers in a session on the eSignature Management page.

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

Click **Administration > Remote Attachment Template**.
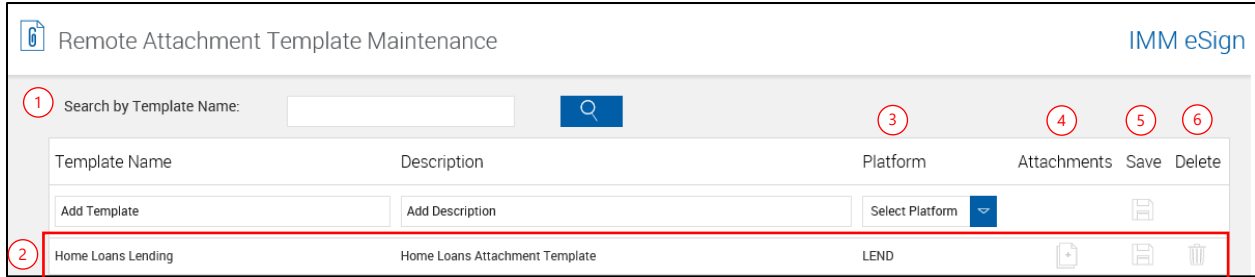
1 **Search by Template Name**: When editing templates, this allows quick location of existing templates by filtering the name. The search will automatically start after typing 2 letters.

2 List of existing templates

3 **Platform**: This is also referred to as a dictionary.

4 **Attachments Icon**: Click to expand and edit the 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 template row is expanded to display the Requested Attachments section.
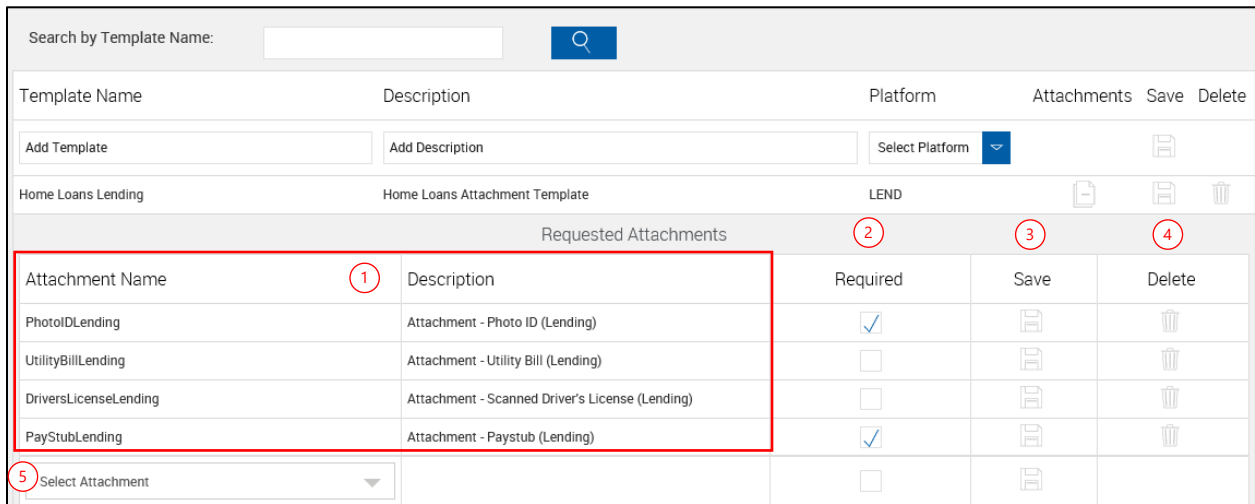
1 **AIM-Defined Attachment Details**: The Attachment Name and Description are defined in AIM and cannot be edited on this screen.

2 **Required**: When checked the attachment will be required when the session is remotely signed. This required checkbox can be toggled when processing the session.

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 **Add Template** text box to start.

1 **Add Template**: Enter a new template name.

2 **Add Description**: Enter a template description.

3 **Platform**: Select a platform (sometimes referred to as a dictionary).

4 **Save**: Click the Save icon. The page refreshes.

Add Attachment

1 After a template is added or in an existing template, add attachments to the template.

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**: Click to save changes to the attachment.

After clicking **Save**, 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, edit a template.

1 Click in the **Template Name** or **Description** and make changes as necessary.

2a **Save**: Click to save changes to a new template.

2b **Save**: Click to save changes to an existing template.

3 **Attachments**: Click to expand and edit the attachments.

4 **Delete**: Click to delete the associated template. A confirmation popup appears. Click **OK** to delete the template.

Edit Attachment

1   After expanding the attachments, edit the Required checkbox.

1   Only the Required checkbox can be edited.

2   **Save Icon**: Click to save changes to the attachment.

3   **Delete Icon**: Click to delete the associated attachment.

Contact IMM Support

Feel free to contact us with any issues or concerns.

Phone: 800.836.4750 Option 3 (8:30am - 10:30pm ET)

Fax: 908.862.6446

Email: support@immonline.com

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