

IMM eSign

Implementation Plan

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Introduction

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

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

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

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

Stage 1 | Installation & Configuration

(2+ hour duration based on completion of prerequisites and resources)

Application Server Installation – install of eSign and components

Prerequisites:

- OVA files to be downloaded and applied to the server
- The server must have internet connectivity during the installation
- Ensure the server is added to the domain
- You will need to have two test workstations ready, including peripherals (Printer, In-person devices, Scanners, as applicable) to test connectivity from to your business application once integration is completed.
- We need to be WebEx connected directly to one of the test workstations
- We need a remote connection to the IMM eSign Server
- Set User Account Control (UAC) to Never Notify for installation

[Resources to include:](#) IMM Installer, Institution's IT Administrator, Institution's User & Groups Administrator, DB Administrator

Additional Requirements for Configuration

Prerequisites:

- Imaging System Index Keywords and output format
- 2 documents for template creation

Training Workstation Installation – install of eSign Client components

Prerequisites:

- Workstation staged per IMM System Requirements
- Workstations' User Account Control set to NEVER (server reboot)
- Supported version of Internet Browser
- Logged onto the workstation with an account that has rights to install

[Resources to include:](#) IMM Installer ; Institution's IT Administrator; Institution's Implementation Lead; Proprietor of the workstation

End to End Testing – required before Stage 2

Prerequisites:

- Data passage connectivity (from the FI's development financial platform(s))

[Resources to include:](#) IMM Installer; Institution's Implementation Lead; Proprietor of the workstation

Stage 2 | Training

Administrative Training (2 hour duration)

This training consist of Administrative task as defined:

- Review installation of the workstation components
- Go through the Administrative screens of eSign
- Review overall maintenance of the eSign solution

Prerequisites: Webex Remote session to the eSign application

Resources to include: *IMM Trainer; Institution's Implementation Lead; Institution's IT Administrator; Institution's User Groups Administrator*

Administrative Remote Training via Video (30 Minutes)

This training video consists of remote settings, which needs to be defined by the Institution to their business needs:

- Demo of the eSign Remote operator and consumer process
- Review eSign Web settings pertaining to eSign Remote
- Additional Q&A follow-up session will be provided per requested by the Institution

Prerequisites: Video url link to be provided by your IMM Implementation Project Manager.

Resources to include: *Institution's Implementation Lead; Institution's IT Administrator; Institutuion's User Groups Administrator*

Discovery Call (1 hour duration)

This call will be utilized to discuss the Institution's business process and review of documents applicable to your specific platforms.

Prerequisites: WebEx Remote session to the Institution's Implementation Lead workstation for demonstrating how documents are generated

Resources to include: *IMM Designer; Institution's Implementation Lead; Personnel who understands the business processes*

Document Template Creation (2 hour duration)

This training consist of publishing the electronic documents within the IMMeSign and Adobe Sign* applications.

Creating templates based on your business systems/processes.

- Creating, uploading and/or applying definitions to the electronic documents (performed in eSign, AIM and/or Adobe)
- Setting document properties
- Building a reference comma delimited file for the use of importing into the Optical system (Parameter.txt) *
- Building a reference file for product type-to-document set association (Description.txt) *

Prerequisites: WebEx Remote session to the Training workstation; access to the eSign application server; Documents for uploading / defining into eSign.

Resources to include: *IMM Trainer; Institution's Implementation Lead; Institutions Document Administrator; Institution's Personnel who understands the business processes*

Train-the-Trainer (2 hour duration)

Training on end user processing

Prerequisites: Full end-to-end testing prior to this training; WebEx connection to the workstation used during the end-to-end testing

Resources to include: *IMM Trainer; Institution's Implementation Lead; Institution's Employee Trainer*

Stage 3 | Preparation for Live

(Based on FI's resources to complete task)

Financial Institution Task

- Complete document template task
- Complete CAT Matrix provided by IMM's Project Manager
- Provide internal training to end users
- Ensure applicable workstations have the required software and peripheral devices installed (or in place for live day deployment)
- Ensure arrangements with the financial platforms (Host / LOS / Account Opening / Deposit Origination, etc.) are in place for this task

Stage 4 | Live Day

(4 Hour timeframe)

Day of Task

- Data passage connectivity (from the FI's production financial platform(s))
 - IMM Installer to clear all test and training data from the eSign application
 - IMM and FI will perform an end-to-end test from all financial platforms / applications
 - IMM Installer is available for dedicated support the day of live
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