

End of Support Notices

- Microsoft SQL Server 2012
- Microsoft Server 2012
- Microsoft Windows 7
- Citrix XenApp and XenDesktop 7.17
- VMware Horizon 7.4

Deprecated Features

- Admin Index Manager (AIM) Client and Printer

Note: Using AIM with eSign 2020.x will cause an error. It is recommended to uninstall AIM as part of the 2020.x upgrade process.

- Document Designer Confirmation page

Supported Upgrades

- IMM eSign Server 2017.x or higher
- IMM eSign *plus* 2017.x or higher

New Supported Environments

- Microsoft Windows Server 2019
- Microsoft SQL Server 2019
- Citrix Virtual Apps and Desktops Version 7 2003
- VMware Horizon 7.12

2020.1

eSign XML Features

- The Search Active page is updated.
 - Customize your search to filter the results based on **Completed**, **Partially Completed**, and **Not Started**:
 - When **Completed** is selected, search results display sessions that have had all signatures, initials, reviews, or required data fields completed.
 - When **Partially Completed** is selected, search results display sessions that have one or more signatures, initials, reviews, or required data fields that have not been completed.
 - When **Not Started** is selected, search results display sessions that have no signatures, initials, reviews, or required data fields completed.
 - The Date Range search field allows results to be filtered by **Date Created** or **Expire by Date**.
- The **Search Completed** page now displays archived documents that do not have index fields as not indexed.
- The system will set the content copying properties to Allow in the archived PDF, which will enable most third-party OCR applications for imaging system imports.
- Sessions are now locked only when a user takes action on the session. This allows users to expand session rows to view details without locking the session.
- Loan coupon and starter check reports are easily accessible (if applicable) as separate options in the Reporting menu. In addition, the **Loan Coupons Report** and **Starter Checks Report** pages have a responsive UI and enhanced search parameters due to the addition of the Date Range filter.
- The Saved Session Expiration Report now has an owner column so that the user can identify who initially created the document set and who owns the document set.
- For fresh installations, the “Place FI Logo Here” logo is added as the default logo during setup instead of the IMM logo as an opportunity to remind administrators to replace the logo with a customized one. For upgrades, the existing logo is retained.
- Export the details of all users and groups, including their permissions, for data retrieval and FI auditing purposes on the **Group Maintenance** and **User Maintenance** pages.
- The permission “Group Members Can Edit Documents (Existing Sessions Only) and “Users Can Edit Documents (Existing Sessions Only)” are changed to “Group Members Can Process Documents (Existing Sessions Only)” and “Users Can Process Documents (Existing Sessions Only).”

- On the **Consent** page, the consumer disclosure is now displayed in a UI that minimizes user scrolling and accelerates the in-person signing process.
- Financial institutions have the option to require signers to view the entire disclosure before signing documents so as to enhance the FI's ability to more effectively obtain consent.
- When the completion order of the remote signers is set to **Complete in Any Order** and the Kiosk feature is enabled, all signers' signing URLs are available on the **eSignature Management** page.
- Administrators can override imaging preferences at the platform and FI level. This feature is only available with certain partners.
- Choose to enable FI-level index fields by default for imaging systems instead of using document-level indexes. If using document-level indexes, every document must have at least one index for the document to be successfully indexed.
- The new XMLEncode custom function supports using XML-encoded characters in an XML output.
- Administrators are prevented from defining documents as image-based documents if text can be extracted from them.
- Validate email addresses in eSign API when a session is submitted for remote signing. If an email address is invalid, an error message is displayed.
- Send documents containing checkboxes, textboxes, dropdowns, and radio buttons to eSign using the eSign REST API.
- The **Document Designer** page is enhanced. Document Designer is used when an attachment is selected and a user wants to add signatures, initials, or other fields to that attached document.
 - There are additional toolbar items that make designing documents easier, such as alignment and snap-to-grid tools.
 - The new Fields area lists all of the fields in a document for easy navigation.
 - Delete a signer and all fields assigned to that signer with one click.
 - The user experience is improved when reviewing signer assignments, unmapped fields, and optional fields.
 - Radio buttons can be added to a document allowing users to select only one radio button option from a group of two or more radio buttons.
 - iPads using the Safari web browser are now supported.
- eSign has a new **Process Sessions on All Browsers** setting that delivers full-featured capabilities, including signing in person using signature pads and displaying documents during processing, when launched using Google Chrome, Internet Explorer 11 (IE 11), and

Mozilla Firefox. Safari on an iPad supports all user features except signature pads, scanners, and reports.

- If using signature pads with Google Chrome or Mozilla Firefox, signature pad messages must be disabled. Refer to the Topaz Systems SigPlus website for details about installing the latest SigPlus software and drivers: https://www.topazsystems.com/sigplus_extlite.html.
- If using IE 11 and the **Process Sessions on All Browsers** setting is not enabled, Adobe Reader is required. Refer to the Adobe Reader Compatibility chart for the latest supported Adobe Reader versions: <https://www.immonline.com/adobe-reader-compatibility/>.
- The **Document Maintenance (XML)** page has a check out feature. Check Out allows an administrator to export an uploaded PDF that may have issues for IMM Support.
- If enabling the **Process Sessions on All Browsers** setting, the PDFs that are designed in LiquidOffice can be uploaded to eSign and internally converted to the latest eSign format for viewing, filling, and processing.
- Microsoft Edge is not supported.

eSign XML Bug Fixes

- When printing the Transaction Based Report, only the results displayed on the page are printed instead of all of the results.
- The physical archived documents from an FI's Archive folder on the eSign server are not deleted if the **Archived Documents Retention** days setting is less than the **Download Documents for Session Status** days setting.
- When upgrading, the **Allow users to delete sessions** setting was not set to **Deny** as expected.
- Upgraded sessions were failing due to change of eSign folder location. Now, eSign points to the correct eSign folder location when upgrading.
- On the **Consent** page, a reviewer could not proceed if there is no signature pad and the Type option is disabled. Now, the Type option is available even if the Type option was disabled at the FI level so that the reviewer can proceed.
- When using Silverlight to capture a photograph on the Internet Explorer web browser, the file size is large and the photograph fails to upload.
- After processing a CUNA attachment, the checkmarks in the checkboxes are displayed as number fours (4) instead of checkmarks.
- For the True Image imaging system, the produced XML is using the Document_Type tag instead of DocumentType.
- When duplicate index field names are defined for the same dictionary in an FI, there is an error on the **Index Field Maintenance** page while indexing. Now, duplicate index field names do not result in an error.

- When archiving a session, Full_Name is not getting parsed in the Archive File Name correctly.
- When a PDF that has a capitalized file extension (.PDF) is added to a document set, the document cannot be assigned to a dictionary.
- If automatically selected documents are removed, new documents cannot be added when a new session is launched in eSign.
- When a session is created using the eSign API, duplicate fields are not automatically populated with the data.

eSign RTS Features

- The **Document Designer** page is enhanced. Document Designer is used when a template, undefined document, or attachment is selected and a user wants to add signatures, initials, or other fields to that attached document.
 - There are additional toolbar items that make designing documents easier, such as alignment and snap-to-grid tools.
 - The new Fields area lists all of the fields in a document for easy navigation.
 - Delete a signer and all fields assigned to that signer with one click.
 - The user experience is improved when reviewing signer assignments, unmapped fields, and optional fields.
 - Radio buttons can be added to a document allowing users to select only one radio button option from a group of two or more radio buttons.
 - iPads using the Safari web browser are now supported.
- The **Search Active** page is updated.
 - From the **Search Active** page, customize your search to filter the results based on **Completed, Partially Completed, and Not Started**:
 - When **Completed** is selected, search results display sessions that have had all signatures, initials, reviews, or required data fields completed.
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 - The Date Range search field allows results to be filtered by **Date Created** or **Expire by Date**.
- The **Search Completed** page now displays archived documents that do not have index fields as not indexed.

- The system will set the content copying properties to Allow in the archived PDF, which will enable most OCR applications.
- Sessions are now locked only when a user takes action on the session. This allows users to expand session rows to view details without locking the session.
- Loan coupon and starter check reports are easily accessible (if applicable) as separate options in the Reporting menu. In addition, the **Loan Coupons Report** and **Starter Checks Report** pages have a responsive UI and enhanced search parameters due to the addition of the Date Range filter.
- The Saved Session Expiration Report now has an owner column so that the user can identify who initially created the document set and who owns the document set.
- For fresh installations, the “Place FI Logo Here” logo is added as the default logo during setup instead of the IMM logo as an opportunity to remind administrators to replace the logo with a customized one. For upgrades, the existing logo is retained.
- Export the details of all users and groups, including their permissions, for data retrieval and FI auditing purposes on the **Group Maintenance** and **User Maintenance** pages.
- The permission “Group Members Can Edit Documents (Existing Sessions Only)” and “Users Can Edit Documents (Existing Sessions Only)” are changed to “Group Members Can Process Documents (Existing Sessions Only)” and “Users Can Process Documents (Existing Sessions Only).”
- On the **Consent** page, the consumer disclosure is now displayed in a UI that minimizes user scrolling and accelerates the in-person signing process.
- Financial institutions have the option to require signers to view the entire disclosure before signing documents so as to enhance the FI’s ability to more effectively obtain consent.
- When the completion order of the remote signers is set to **Complete in Any Order** and the Kiosk feature is enabled, all signers’ signing URLs are available on the **eSignature Management** page.
- Administrators can override imaging preferences at the platform and FI level. This feature is only available with certain partners.
- Choose to enable FI-level index fields by default for imaging systems instead of using document-level indexes. If using document-level indexes, every document must have at least one index for the document to be successfully indexed.
- The new XMLEncode custom function supports using XML-encoded characters in an XML output.
- Administrators are prevented from defining documents as image-based documents if text can be extracted from them.
- Validate email addresses in eSign API when a session is submitted for remote signing. If an email address is invalid, an error message is displayed.

- Send documents containing checkboxes, textboxes, dropdowns, and radio buttons to eSign using the eSign REST API.
- eSign delivers full-featured browser capabilities, including signing in person using signature pads and displaying documents during processing, when launched using Google Chrome, Internet Explorer 11 (IE 11), and Mozilla Firefox. Safari on an iPad supports all user features except signature pads, scanners, and reports.
 - If using signature pads with Google Chrome or Mozilla Firefox, signature pad messages must be disabled. Refer to the Topaz Systems SigPlus website for details about installing the latest SigPlus software and drivers: https://www.topazsystems.com/sigplus_extlite.html.
 - If using IE 11, Adobe Reader is required. Refer to the Adobe Reader Compatibility chart for the latest supported Adobe Reader versions: <https://www.immonline.com/adobe-reader-compatibility/>.
- eSign Client is redesigned as a lightweight, browser-based component. Upload printed documents or PDFs stored on a file share to new or existing sessions. When documents are uploaded, the eSign web user interface launches automatically to display the new **Collected Documents** page and the uploaded documents. From the **Collected Documents** page, add, remove, and reorder documents. Selected documents can be added to an existing session or used to create a new session. If documents are printed while the eSign web user interface is already open with an active session, simply click the **Add Docs** button on the **Session Details** page to add the documents to an existing session. Otherwise, access documents from the **Processing > Collected Documents** menu.
- If an FI has multiple domains, there is a configurable setting where the domains can be listed. This allows the user to log in from multiple domains. Contact IMM to configure this setting.
- The new eSign Client is easy to install and manage:
 - As part of the eSign Client install, only the eSign Server URL is required.
 - Optionally include Adobe Reader, SigPlus, camera, and scanner during installation.
 - In-House Installations:
 - When set to Create and Activate, users will be prompted for their password during their first login or if the password is reset.
 - When set to Create, Do Not Activate, users will be prompted for their password during their first login, but login will fail if the user is inactive.
 - When set to Do Not Create, login will fail and an error is logged because the user does not exist.
 - For upgrades, it is recommended for users to reset their eSign account password.
 - Hosted Installations:
 - It is recommended that the FI ID is unique.

- Users will need the FI ID and password to log in.
- When set to Create and Activate, users will be prompted for their password, which the FI Admin should share, on the first login.
- When set to Create, Do Not Activate, users will be prompted for their password on the first login, which the FI Admin needs to activate for the user prior to login.
- When set to Do Not Create, users will be prompted for their password on the first login, which the FI Admin needs to create/activate for the user prior to login.
- From the eSign Client system tray icon, easily switch between live and training financial institutions (FIs). This is an optional feature.
- The new **Template Manager** page delivers a browser-based template definition tool.
 - Admin Index Manager (AIM), now known as Template Manager, is integrated into the eSign web user interface. Now that the Template Manager features are available directly in the eSign web browser, complete all of your administrative tasks from one streamlined location.
 - From the **Template Manager** page, define elements of the template such as document properties, indexes, signer information, fillable fields, signatures, and initials fields.
 - Add radio button groups using Template Manager.
 - New templates can be designed from the **Document Maintenance** page, created on the **Document Designer** page, or created from undefined documents on the **Collected Documents** page.
 - Existing document templates can be modified from the **Document Maintenance** page.
- Image-based documents are now supported. Enable this feature in Template Manager to allow text recognition and extraction of document types, signer information, and indexes in static, image-based documents. The image-based process should not be used for documents that are text based.
- The **Document Maintenance (RTS)** page includes Import Template and Export Template features to share document template definitions between installed locations. During export, select which properties should be exported (document type, indexes, fields, and imaging indexes). During import, there is an option to overwrite template properties in the existing template.
- On the **Document Maintenance (RTS)** page, the Export button creates a CSV file that lists all defined documents, their properties, and the updated/modified date information.
- Automatically push archived session documents directly to a partner system by selecting that partner system on the **Document Maintenance (RTS)** page. Please contact your IMM representative regarding which business applications are supported.
- When merging parties, the full name takes precedence over the first name and last name.

- Monikers and custom functions are supported in index fields.
- On the **Document Maintenance (RTS)** page, the “Review for Non Signing Parties” radio buttons replace the “Review/Do Not Review” toggle.
- The ability for parties to be assigned to review documents without the need for signatures or initials is supported for any session created using eSign Client or the **Collected Documents** page. Previously, only sessions created using TeSignLite API supported this feature.
- The HTTP 403 response includes the requestor’s IP address when IP Filtering is enabled.
- The Intelligent eSignature Engine (ISE) Knowledgebase is expanded.
- The ISE Knowledgebase is extended to support processing dynamic documents generated by ComplianceOne and WKFS Expere document platforms.
- Imaging indexes for eSign API are supported for Synergy and Other XML imaging systems.
- TCI Lending is supported (fees may apply).
- ABS CoPilot is supported (fees may apply).
- Salesforce integration for nCino is supported (fees may apply).
- FinSer dispute tracking system is supported (fees may apply).
- Microsoft Edge is not supported.

eSign RTS Bug Fixes

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- After processing a CUNA attachment, the checkmarks in the checkboxes are displayed as number fours (4) instead of checkmarks.
- For the True Image imaging system, the produced XML is using the Document_Type tag instead of DocumentType.
- iDocMerge is being flagged as a potential virus.
- Document Designer does not allow signer email addresses with top-level domains (TLDs) greater than five characters (for example, “studio” in bwilliams@domain.studio).
- When sessions are opened after upgrading, all documents are set to not display.
- The *SetupPrinter.bat* file does not account for silent installations on Citrix servers.
- If a signer name consists of ten or more words in a session with dynamic documents, the session cannot be processed.
- When eSign Client is uninstalled, the Windows service related to its printer is not removed.
- Silent uninstallation does not uninstall the eSign Client Printer.
- When PDFs are printed using the eSign Client Printer, they are rotated and the mapping is not shown.
- For the eSign Client Printer, filenames with elements containing periods have truncations.
- When reordering documents in sessions that have more than 15 documents, reordering is slow.
- Signature fields, textboxes, and checkboxes in ProSign documents are not recognized in eSign.
- The default FI-level index field value is being used instead of the default document-level index field value.

eSign *plus* Features

- The Document Designer page is enhanced. Depending on your integration, Document Designer is used when a template, undefined document, or attachment is selected and a user wants to add signatures, initials, or other fields to that attached document.
 - There are additional toolbar items that make designing documents easier, such as alignment and snap-to-grid tools.
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Release Notes for 2020.x

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- eSign delivers full-featured browser capabilities, including signing in person using signature pads and displaying documents during processing, when launched using Google Chrome, Internet Explorer 11 (IE 11), and Mozilla Firefox. Safari on an iPad supports all user features except signature pads, scanners, and reports.
- Reorder conditions within a rule.
- Evaluate the conditions established for a rule to determine if the conditions are valid.
- Non-merged data can be factored into conditional routing.
- Microsoft Edge is not supported.

eSign *plus* Bug Fixes

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- When upgrading, the **Allow users to delete sessions** setting was not set to **Deny** as expected.
- Upgraded sessions were failing due to change of eSign folder location. Now, eSign points to the correct eSign folder location when upgrading.
- On the **Consent** page, a reviewer could not proceed if there is no signature pad and the Type option is disabled. Now, the Type option is available even if the Type option was disabled at the FI level so that the reviewer can proceed.
- When using Silverlight to capture a photograph on the Internet Explorer web browser, the file size is large and the photograph fails to upload.
- After processing a CUNA attachment, the checkmarks in the checkboxes are displayed as number fours (4) instead of checkmarks.
- For the True Image imaging system, the produced XML is using the Document_Type tag instead of DocumentType.
- When a signer is no longer required to sign or review, eSign *plus* still lists the party as Not Signed.
- After upgrading, remotely signed documents are not downloading.
- Occasionally, if there is a timeout error when copying a workflow, the copied workflow is not created and the published version of the workflow is opened.
- Occasionally, when a remote session is downloaded, the signer status is not updated and the workflow does not get routed to the archiving step.
- Archived documents are being looped back to the archive step.