IMM eSign 2022
Release Notes

Deprecated Features

- eSign Client 2016.8

Notes

- Refer to the system requirements for the latest operating system, processing, and memory prerequisites.

eSign 2022.3

Supported Client Versions

Note: For all of the latest features and fixes, eSign Client 2020.1.6 is required.

- eSign Client 2018.2 or higher

Features

New Document Review Option

- When a document template is set to "Review only by parties who are assigned fields in this document," the document will only be visible to parties that have fields assigned to them. If no parties are assigned to fields within the document, the document will be hidden from all parties in the session. Institution representatives with the appropriate permissions are still able to make changes to document visibility during the session as needed. This feature is applicable to RTS environments. (ES-1448)

CSI CenterDoc Imaging System

- New integration with CenterDoc API allows institutions to submit documents directly to a CenterDoc API endpoint without the need to use the generic Index.txt imaging system. Once CenterDoc is configured for the institution, administrators simply select the CenterDoc imaging system from the Imaging System Settings page and configure the settings as needed. Indexing is supported for PDF documents only. (ES-1689)

Provide Current Document Date and Time to Imaging System

- Convert the current date and time to a specific time zone and send the document information to your imaging system when archiving a session. On the Imaging System Settings page, use the GetCurrentDateTime function to take advantage of this feature. If the time zone parameter is not populated, the default time zone is UTC. (ES-1748)

Fixes

- Session Status Push service does not automatically process queued documents when the database connection is restored. (ES-1714)
- When phone authentication is selected, the session audit report lists the recipient's email address instead of the phone number. (ES-1765)
- eSign Client connectivity is lost after Retain Audit Trail (Days) are elapsed (default is 90 days) if Retain Audit Trail (Days) is set to a value less than the eSign Client Access Valid for (Days) setting (default is 365 days). (ES-1744)
- In some scenarios, the externally mapped index values provided in XML files are being replaced with other index values. (ES-1728)

IMM eSign

- When a user has the User Can Transfer Sessions permission set to Their Own Sessions Only and User Can Delete Unsigned Sessions permission set to Any Session, the user is only able to transfer their own sessions on the Search Active Sessions page. (ES-1676)

- When a TrueImage imaging system XML file is generated, the Imaging Index Title is not used. (ES-1750)

eSign 2022.2

Supported Client Versions

Note: For all of the latest features and fixes, eSign Client 2020.1.6 is required.

- eSign Client 2018.2 or higher

Features

Topaz GemView

- The Topaz GemView signing experience is enhanced. (ES-925)

  o Before starting the signing process, GemView devices can be detected automatically, which allows eSign to tailor the FI representative and consumer signing experience for better service and productivity. Enable the Detect GemView Device feature from the eSignature Settings page.

  o When a GemView device is automatically detected, eSign can be configured to automatically display the eSign browser on the GemView device without any involvement from the FI representative. Enable the Auto Push to GemView feature from the eSignature Settings page.

    ▪ If Detect GemView Device is not selected, the Detect GemView Device setting will be automatically selected when Auto Push to GemView is selected.

    ▪ If Detect GemView Device is selected but Auto Push to GemView is not selected, the eSign browser is not automatically displayed on the GemView device. FI representatives must click the Push to GemView button on the Consent page before the consumer can take control using the GemView device.

  o Instead of manually moving the eSign browser back and forth between workstation and GemView screen, the GemView screen is duplicated on the workstation to allow the FI representative to follow along with the consumer and assist as needed.

Scanner

- Personalize the eSign browser to show or hide eSign's scanning capabilities. When enabled, FI administrators and FI representatives within the institution will be able to use scanners to add documents to sessions, and they can modify scanner settings as needed. When disabled, FI administrators and FI representatives will not have the option to scan documents or modify scanner settings. (ES-1175)

ComplianceOne Documents

- When the keyword "By:_____" is detected in a ComplianceOne document, a guarantor signature field is automatically added to the underscored area. (ES-611)

PDF Flattening (RTS with API Integration)

- PDF flattening architecture is updated. This feature is applicable to RTS environments with API integration. (ES-1098)

IMM/eSign

Release Notes

Fixes

- When the archived time and date index values of a document are converted to Universal Coordinated Time (UTC) before being sent to the imaging system, the time difference causes the document to have an archived time and date that occurs on the next day. For example, a document that is archived at 5:01 PM on May 1 in Pacific Time will be converted to 12:01 AM May 2 UTC. To fix this, the imaging system settings can be configured to follow the preferred time zone of the institution using the Imaging Default Time Zone setting on the Imaging System Settings page. (ES-1560)

- During in-person signing, the signature/initial date is generated based on the server time zone instead of the local workstation time zone. (ES-1142)

- The PAGE anchor keyword is not recognized in ComplianceOne Documents. (ES-864)

- The signature date field is missing in ComplianceOne documents. (ES-859)

- Dynamic anchor fields are displayed as unmapped field in ComplianceOne documents. (ES-1651)

eSign 2022.1

Supported Client Versions

Note: For all of the latest features and fixes, eSign Client 2020.1.6 is required.

- eSign Client 2018.2 or higher

Features

eDelivery

- eDelivery is enhanced. After documents are reviewed and signed in person, choose who receives the documents via secure email delivery. Previously, all signers/reviewers received the documents. (ES-1140)
  - On the eSignature Management page, checkboxes are provided next to each signer. By default, all signers/reviewers are selected as eDelivery recipients to receive the documents. Unselect anyone who should not receive the documents.
  - A pop-up confirmation shows the list of recipients and a list of those excluded from eDelivery.
  - The Detail Audit includes details about all parties involved in the session. The Session Audit records who received the documents via eDelivery.

Remote Transactions

- Set custom expiration dates for time sensitive remote transactions easily in eSign. (ES-1184)
  - Using the Transaction Expires in (Days) setting on the eSignature Settings page, administrators can configure how many days until the remote transaction expires for each remote message template.
  - Financial institution representatives can manually change the expiration using the Completion Deadline on the eSignature Management page depending on the permissions assigned to them. The Detailed Audit tracks changes made to the Completion Deadline from the eSignature Management page.
  - To use this feature, confirm that the Enable Expiration setting in your Adobe portal is turned on. If changes are made to the default number of days in the Adobe portal after a remote transaction is sent to your customer, the Adobe default takes precedence and eSign will be synced with the Adobe default at the next remote session status update.

Release Notes

- Select a default remote message template for specific document sets and documents. To streamline the signing process and reduce guesswork for your FI representative, a remote message template will be preselected on the eSignature Management page based on the document or document set that is part of the transaction. Because certain documents and documents sets require different messages, the document or document set's default remote message template will take precedence over the institution's default remote message template. In some scenarios, the default remote message template may not be the desired remote message template; therefore, FI representatives can select a different remote message template on the eSignature Management page as needed. (ES-1181)

Remote Attachments

- The design and usability of the Remote Attachment Template Maintenance and Request Remote Attachment user interfaces are updated. (ES-1180, ES-1076)

Merging Signers (RTS)

- When merging parties on the eSignature Management page, the confirmation message that is displayed before the parties are merged is updated to be more user friendly. This enhancement is applicable to RTS environments. (ES-624)

Document Maintenance (XML)

- The exported CSV file from the Document Maintenance (XML) page provides details about criteria conditions. This enhancement is applicable to XML environments. (ES-401)

Security

- Security enhancements are included in this release.