

IMM eSignCloud 2022

Release Notes

eSignCloud 2022.4

Supported Client Versions

- eSign Client 2018.2 or higher is supported.
- eSign Client 2020.1.6 is required to enable all of the latest features and fixes.

Features

Collected Documents Page Enhancements

The usability of the Collected Documents page is enhanced to make it easier to identify documents that do not belong in a session. The following enhancements were made to the page:

- eSign detects mismatched document index field values to prevent documents that do not belong in the session from being added to the document set. A warning message is displayed on the Collected Documents page. A warning popup window is displayed before the user can create a session or add the documents to an existing session. The Validate Collected Documents Page setting must be enabled by a Host Administrator to use this feature.
- Designate the document index fields that eSign will use to detect mismatched document index field values. To designate document index fields, the Check for Mismatches on Collected Documents Page setting on the Index Fields Maintenance page must be turned on. When the Check for Mismatches on Collected Documents Page setting is turned on for document index fields, on the Collected Documents page, the first two chosen document index fields will be displayed for each document by default, and the user can expand the document row to view any additional index fields.
- A time stamp is displayed in the document row to indicate when the document was successfully uploaded to eSign.
- Remove all selected documents with one click instead of deleting each document one at a time.
- Before documents are deleted, a confirmation window is displayed to prevent accidentally deleting documents.
- This feature is applicable to RTS environments. (ES-1756)

Messages on Signature Pads

- A signature line is displayed on the signature pad to indicate where to sign when the "Display messages on signature pad" setting is enabled on the eSignature Settings page. (ES-2135)
- The default signature pad messages are updated for consistency and improved clarity. (ES-2134)

Copy Users and Groups

- Rather than manually creating a new user or group, administrators can save time and effort by copying an existing one. Copy an existing user from the User Maintenance page or copy an existing group from the Group Maintenance page, and apply the desired settings from the existing user or group to the new user or group. (ES-1377)

Default Authentication Improvements

- Improvements are made to the processes for configuring which authentication types are available to a financial institution representative and setting the default authentication type. (ES-1711)
- Using the Allowed Authentication Types setting, host administrators can configure which authentication types will be available to financial institution representatives on the eSignature Management page, in the Default eSign Authentication Type setting, and in the API. Previously, a text field (Skip Services) was used for this feature.

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- Tailor the default authentication type to your specific financial institution's needs to reduce the number of steps your financial institution representatives must perform to get sessions reviewed and signed. To set the default authentication type for the FI, navigate to the eSignature Settings page and select an option from the Default eSign Authentication Type menu. If your environment does not have the Remote Signing feature, only In-Person will be displayed.

General Settings Page Updates

- The General Settings page is updated for better organization and to support help text. (ES-1099)

API Keys

- Generate an API key automatically to avoid manual text entry. The API key can be generated from the General Settings page (FIAdmin) or the Add or Edit Financial Institution page (HostAdmin). (ES-1935)

Party Review Options

- Setting names for Party Review Options on the Document Maintenance (RTS) page are updated for clarity (ES-1835):
 - Review by all parties defined in the session
 - Review only by parties defined in this document
 - Review only by parties assigned fields in this document

Adobe Sign Domain Name Change

- Adobe Sign updated the domain name from echosign.com to adobesign.com. New financial institutions will be automatically assigned to the adobesign.com domain in eSign. Existing financial institution administrators can manually update the domain name in eSign using the Remote Signatures Service URL setting in the Other Remote Settings tab on the eSignature Settings page. Alternatively, host administrators can update the domain name in eSign using the Remote Signatures Service URL setting in the Remote Signatures tab on the Add or Edit Financial Institution page. (ES-1762)

Security

- Password security and protocol is strengthened for internal file sharing. (ES-1721)

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Fixes

The following is a list of issues that have been fixed in this release:

- When verifying identity for an existing agreement created by eSign via Adobe Sign API, the country code +1 is associated with Canada instead of the United States in the Adobe Portal. (ES-1707)
- Radio button labels are missing during signing when templates are defined in eSign but the session is created via API. (ES-879)
- Radio groups in attachments shift positions during preview and signing when in landscape mode. (ES-959)
- On the Session Details page, the Display / Do Not Display icon is missing for attachments that have radio buttons. (ES-976)
- If a document is set to Always Archive and no parties are defined in it, the document is not displayed on the eSignature Management page for eSign API sessions. (ES-881)
- After deleting documents from an eSign API document set, signature fields are not identified and remote parties receive the wrong documents to sign. (ES-858)
- eSign API documents with short names or full names with spaces caused an error. To fix this, short names and full names in eSign API documents can have spaces. (ES-619)
- When a document is edited in Document Designer, eSign increases the date field font size, which causes the date field to be cut off. (ES-1865, ES-1949)
- When uploading the Starter Checks ZIP file, some PDFs are not uploaded to the source folder, and after manually updating the source folder with the missing PDFs, the Create Starter Checks menu option is not available. (ES-1718)
- eSign API is not validating the Partner ID when a URL is generated (GetURL). (ES-1127)
- When previewing an archived document in the Chrome Beta web browser, signatures overlap photos if a signature pad was used. (ES-1782)
- When an index.txt file is in use by other applications, the index.txt file is reported as successfully sent to the imaging system even though it cannot be sent to the imaging system while in use. (ES-1913)
- If the Design button is clicked on the Session Details page, there is an error if the session was created using TeSignLite and the session has third-party attachments. (ES-2009)
- When an RTS document that is sent via eSign or TeSignLite API is matched to a template based on the document's full name (long name) instead of document type, an error occurs if there is party information associated with the template. (ES-2082)
- On the Search Completed Sessions page, index fields cannot be edited because the Save and Cancel buttons are not displayed. (ES-2083)
- After the signing process is completed, a sample image is displayed on the GemView device instead of a black screen. (ES-2151, ES-2152)