Release Notes

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 will cause an error. It is recommended to uninstall AIM as part of the 2020 upgrade process.

- Document Designer Confirmation page

New Supported Environments

- Microsoft Windows Server 2019
- Microsoft SQL Server 2019
- Citrix Virtual Apps and Desktops Version 7 2003
- VMware Horizon 7.12
- iOS 13 (Mobile mode)

Notes

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

Release Notes

eSign 2020.1.3 SP4

Prerequisites

Note: This is a cumulative patch.

- eSign 2020.1.3 or higher
- eSign *plus* 2020.1.2 or higher

eSign XML Features

Note: Running the Convert Documents tool version 1.1.0.0 is required after installing this service pack so that the latest features and fixes can be applied. The Convert Documents tool version 1.1.0.0 is compatible with eSign 2020.1.3 SP3 and higher.

- eSign now delivers full-featured capabilities when launched using the Microsoft Edge web browser.
- The Audit Report now includes the sender email address and the carbon copied (CC) email addresses associated with the remote session.
- Fillable fields are highlighted during processing to help users identify fields that need attention.
- Use the currentValueIndices method in JavaScript to allow the index of a selected value from a dropdown field to be read.
- Use the setReadOnly method in JavaScript to configure a field as read-only.

eSign XML Bug Fixes

- If the Review Legacy Consent setting is selected and the signing methods on the eSignature Settings page are modified, the Review Legacy Consent setting becomes deselected.
- When deleting a document from the Session Details page, the wrong Delete Document window is displayed.

eSign RTS Features

- eSign now delivers full-featured capabilities when launched using the Microsoft Edge web browser.
- The Audit Report now includes the sender email address and the carbon copied (CC) email addresses associated with the remote session.
- From the eSign Client Settings tab on the General Settings page, easily personalize eSign Client configuration in the event of inaccessible (locked) files, which can occur in certain scenarios such as during antivirus scans when there are paired files (PDF and XML/IDX). Using the Retry Attempts for File Access and Delay for File Access (Seconds) settings, configure the number of attempts that eSign Client makes to access paired files (PDF and XML/IDX) and the amount of time between each attempt.
- When the default eSign web browser is already open and new documents are printed using the eSign Client application, configure the eSign environment to either open a new tab in the web browser (default) or display a notification message in the current eSign web browser instead using the Auto Launch eSign in Browser setting. This feature requires eSign Server 2020.1.3 SP4 and eSign Client 2020.1.6.
- Customize the amount of time that the eSign Client notification messages are displayed using the Display Notification for (Seconds) setting.
- Username transparency is improved in eSign Client. When a user is logged in to eSign Client, the username is displayed next to the eSign Client Logout menu option. Hover over the Logout menu option to view the full username and domain.

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Release Notes

eSign RTS Bug Fixes

- If the Review Legacy Consent setting is selected and the signing methods on the eSignature Settings page are modified, the Review Legacy Consent setting becomes deselected.

- When deleting a document from the Session Details page, the wrong Delete Document window is displayed.

eSign Client (RTS) 2020.1.6

Prerequisites

- IMM eSign 2020.1.3 Server or higher

- IMM eSign *plus* 2020.1.2 Server or higher

Supported Upgrades

- IMM eSign Client version 2018 or higher

Features

- eSign now delivers full-featured capabilities when launched using the Microsoft Edge web browser.

- When the default eSign web browser is already open and new documents are printed using the eSign Client application, configure the eSign environment to either open a new tab in the web browser (default) or display a notification message in the current eSign web browser instead using the Auto Launch eSign in Browser setting. This feature requires eSign Server 2020.1.3 SP4 and eSign Client 2020.1.6.

- The eSign Client printer log is improved.

Bug Fixes

- eSign Client crashes when the UNC path or shared folder entered in the Input Folder 1 or Input Folder 2 field is not accessible.

- Downloading a PDF and saving it directly to the Manual Output folder or Output folder causes eSign Client to crash.

- If a document is open in Adobe Reader and it is saved to the Manual Output folder or Output folder, eSign Client does not upload the document.

- Sometimes eSign Client does not upload documents that are saved from a Google Chrome web browser.

- Documents are not displayed in the correct order on the Collected Documents page. This fix requires eSign Server 2020.1.3 SP4 and eSign Client 2020.1.6.

IMM/eSign

eSign *plus* 2020.1.2 SP1

Prerequisites

Note: This is a cumulative patch.

- eSign 2020.1.3 SP3 or higher

- eSign *plus* 2020.1.2

eSign *plus* Features

- Login speed and performance is improved. A scheduled task will routinely sync eSign *plus* user/group permissions and details with Active Directory at a set time interval. In addition, administrators can sync permissions on demand from the User Maintenance page. The sync is completed the next time the user logs in to eSign *plus.*

- Unsigned documents can be deleted after they have been routed to any step in an RTS workflow.

- Task emails sent are no longer given High Priority designation automatically.

eSign *plus* Bug Fixes

- In certain instances, multiple copies of TeA-Audit with Error Code 1513 are found.

- After a signed session is sent for eDelivery, the user must navigate to the Cases page to route the session to the next step.

- In some scenarios, when single sign-on with Active Directory fails due to networking issues, the error message received from Active Directory is incorrectly identified as a new user and the user is automatically created in eSign *plus* resulting in usability errors on the Cases page.

- Occasionally, the Remote Signature Status page does not load when there are a lot of search results.

- In rare scenarios when multiple alerts for different transactions are scheduled for the same user within a specific time interval, some alert emails are not sent.

- When a session is locked by another user, the Cases page displays a Session Expired message.

- After upgrading, the total sessions count displayed on the Cases page is incorrect in some environments.

- In some environments, the Workflow License Usage page is missing the Logout checkboxes.

- When a session with more than 10 documents is signed remotely and downloaded to the eSign server, attachments cannot be added to the session.

- In some scenarios, archived sessions cannot be reindexed and document-level indexes are displayed as read only.

- After upgrade from version 2017, some sessions do not contain a title field.

- When the Signature Status tab is selected on the Search Active Sessions page, the message "Document doesn't have signature field" is displayed for sessions that were pending remote, archived, completed, or canceled status before upgrade to version 2018.

Release Notes

eSign 2020.1.3 SP3

Prerequisites

Note: This is a cumulative patch.

- eSign 2020.1.3 or higher

- eSign *plus* 2020.1.2 or higher

eSign XML Features

Note: Running the Convert Documents tool version 1.1.0 is required after applying this service pack so that the latest features and fixes can be applied.

- Portrait mode is supported for GemView 16 Tablet Display.

- Send sessions for remote signing and viewing using different Sender and carbon copy (CC) email address domains. Create a list of authorized CC email address domains on the eSignature Settings page.

- Support is added for radio buttons to use the PDFBLUR event to auto-populate multiple occurrences of the same field within the same document.

- Load balancing configuration is improved:

  o The shared file path location is updated for IMM File Transfer API.

  o Rights to the shared file path for a specified user are automatically assigned.

  o Convert the primary server to secondary server and secondary server to primary server with ease.

  o A display message is added in the eSign Load Balanced Configuration utility to indicate if the connected server is primary or secondary.

  o Session Status push service is run only on the primary server.

- The Substring function is updated to include an optional IgnoreError parameter that, when set to "true," returns the index value even though the character length of the index value is less than the specified character length parameter. When IgnoreError is set to "false," if the index value's character length is less than the specified character length parameter, an error is returned.

- The About Page popup window is available on the Document Designer page to provide details about the icons on the page.

- When uploading a PDF to eSign fails because the PDF was not created in LiquidOffice, the error message is improved for clarity.

- The conversion tool is improved to automatically convert and upload documents post upgrade. PDFs must be uploaded using the upload tool or manually from the Document Maintenance page.

eSign XML Bug Fixes

- When using a Google Chrome web browser, signatures captured using signature pads are displayed in the documents with a white background.

- When using an Internet Explorer web browser, the Search Completed page loads slowly.

- On the eSignature Management page, if the phone number field is left blank when the Phone Authentication remote authentication method is selected, you are still able to click the Send button.

- In certain scenarios, a signature or initial field added to an attachment via Document Designer is not showing the correct party assignment and action while signing.

- After upgrading to eSign 2020, eSign API sessions created in eSign 2018 cannot be retrieved by passing the unique

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host session ID.

- After sending a session for remote signing using eSign API, only one signing URL is displayed even though all parties are configured to sign/review the documents in parallel.

- Sessions sent for remote signing using eSign API are not eVaulted correctly in eOriginal.

- For eSign API sessions, GetAuditFilePath is not returning the audit report.

- XML LightsOut sessions set for eVaulting are not working as expected.

- Document reindexing fails when a custom date/time function is used as an index and that index value is blank.

- Transaction-based reports do not load if there are a large number of search results.

- When upgrading from eSign Server 2015 or 2017 to eSign Server 2020.1.2, the Session Details page cannot be opened for existing sessions because older versions of eSign have different installation paths.

- Sporadically, eSign downloads 0 KB PDFs from Adobe Sign and archives them.

- Sometimes switching from remote to in-person signing does not update the Index.txt file and the error is not logged in the log file.

- If unlocked for the FI representative and remote signers, radio buttons and checkboxes are displayed without borders during remote signing, and selected checkboxes are displayed with checkmarks instead of X marks in the completed documents.

- If an XML document has trailing spaces in the JavaScript, it cannot be uploaded or processed.

- Users cannot continue processing a document if they manually enter a value in a required drop-down field set to control type "Drop-list, Allowed Free Entry."

- Fields marked as required based on another field value (conditional mandatory) are not working as expected.

- Certain custom validations that are part of IMMValidateFormFunction cause errors that involve other fields in the document.

- When "Process Sessions in All Browsers" is selected, documents using the IMM_CTSM_OnFormLoad function do not display Yes and No buttons.

- When documents using the "is hidden by" expression builder function, the word "Hidden" is displayed in the document during processing.

- Values are not populated for some joint fields that use the "if" expression builder function.

- Values are not populated for the Custom dropdown field from the Fispecific XSL file when eSign is launched with XML data from the core system.

- For single sign-on Windows authentication, if the User ID is sent in the request, eSign is ignoring the Windows user.

eSign RTS Features

- Portrait mode is supported for GemView 16 Tablet Display.

- Send sessions for remote signing and viewing using different Sender and carbon copy (CC) email address domains. Create a list of authorized CC email address domains on the eSignature Settings page.

- Load balancing configuration is improved:

  o Rights to the shared file path for a specified user are automatically assigned.

  o Convert the primary server to secondary server and secondary server to primary server with ease.

  o A display message is added in the eSign Load Balanced Configuration utility to indicate if the connected server is primary or secondary.

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o Session Status push service is run only on the primary server.

- The Substring function is updated to include an optional IgnoreError parameter that, when set to "true," returns the index value even though the character length of the index value is less than the specified character length parameter. When IgnoreError is set to "false," if the index value's character length is less than the specified character length parameter, an error is returned.

- The About Page popup window is available on the Document Designer page to provide details about the icons on the page.

- The "External Index Title" field on the Index Fields Maintenance page is updated to support multiple index field names.

- For templates defined via eSign API, users are prevented from editing full names and short names on the Document Maintenance (RTS) page to allow eSign API full names and short names to be honored within eSign.

- Before a defined template is deleted from the Document Maintenance (RTS) page, a warning message is displayed to inform the user that deleting templates can cause documents to fail reindexing and prevent documents from being sent to the imaging system.

- Sessions created via eSign API and TeSignLite API can be eVaulted.

- When documents are defined in Template Manager and sent via eSign or TeSignLite API, the document and index fields are not updated even when DocLookup is set to True or False.

eSign RTS Bug Fixes

- When using a Google Chrome web browser, signatures captured using signature pads are displayed in the documents with a white background.

- When using an Internet Explorer web browser, the Search Completed page loads slowly.

- On the eSignature Management page, if the phone number field is left blank when the Phone Authentication remote authentication method is selected, you are still able to click the Send button.

- In certain scenarios, a signature or initial field added to an attachment via Document Designer is not showing the correct party assignment and action while signing.

- After sending a session for remote signing using eSign API, only one signing URL is displayed even though all parties are configured to sign/review the documents in parallel.

- Sessions sent for remote signing using eSign API are not eVaulted correctly in eOriginal.

- Document reindexing fails when a custom date/time function is used as an index and that index value is blank.

- Transaction-based reports do not load if there are a large number of search results.

- When upgrading from eSign Server 2015 or 2017 to eSign Server 2020.1.2, the Session Details page cannot be opened for existing sessions because older versions of eSign have different installation paths.

- Sporadically, eSign downloads 0 KB PDFs from Adobe Sign and archives them.

- Sometimes switching from remote to in-person signing does not update the Index.txt file and the error is not logged in the log file.

- Previously, if indexes marked as "Use for Imaging" were manually deleted from an API template on the Document Maintenance (RTS) page, the indexes reappear when the document is sent using eSign API or TeSignLite API. To resolve this, the "Auto Create Index Fields sent by Platform" setting is added to the Document Maintenance (RTS) page. Disable the "Auto Create Index Fields sent by Platform" setting so that API templates retain the manual changes made to the indexes marked as "Use for Imaging" on the Document Maintenance (RTS) page.

- eSign Client fails to connect to eSign when the TeSignLite Server Name setting contains the wrong IP/server name.

- When eSign is set to the anonymous authentication type, eSign Client is prompting users for passwords even though

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the "Create and Activate" option is selected.

- When the index field name in the IDX file uses different capitalization than the External Index Title field on the Index Fields Maintenance page, index field values are not retrieved.

- A document that contains radio buttons that were not defined in Template Manager cannot be used in an eSign API session.

- When replacing a template in Template Manager, if the new PDF is less pages than the existing PDF, the pages of the new PDF are displayed in addition to the extra pages from the old PDF until the Save or Continue button is clicked.

- When replacing a template in Template Manager, the extracted selection text displays the original value from the old PDF instead of the value from the new PDF.

- When replacing a template in Template Manager, the existing PDF name is not displayed.

- When using TeSignLiteAPI, reprocessing the same document with a different short name changes that API document to a non-API document on the Document Maintenance (RTS) page.

- When a document is defined in Template Manager, additional party and signature details are included in the eSign API request, and you are rerouted to Document Designer to map fields, there is an error if an optional field is updated so that the field will be required during signing.

- Sessions created via eSign API ignore parties with review actions.

- Unlocked radio buttons are not displayed for a remote signer in eSign API sessions.

- Party-specific radio buttons are not behaving as expected in TeSignLite sessions.

- Re-sending an eSign-defined document using TeSignLite API with the document definition previously set as false is not working as expected.

- For eSign API sessions, GetAuditFilePath is not returning the audit report.

- When document-level indexes are set to monikers, the application does not resolve the monikers to the right value and does not consider the application-level index in place of the moniker.

- Completed document sets in cloud environments are not sent to MeridianLink and nCino.

- Occasionally, the whitespace anchor is adding signature fields to dynamic documents even though there is no whitespace in the location where the signature fields are added.

- Certain PDFs are not working with existing iDocMerge processing libraries.

eSign 2020.1.3 SP2

Prerequisites

Note: This is a cumulative patch.

- eSign 2020.1.3 or higher

eSign XML Features

- During installation, the service pack checks to see if any dependency processes are running, allows the installer to stop those processes, and then allows the installer to continue installing the service pack so that all DLL files are updated successfully.

eSign XML Bug Fixes

- An eSign purge task (TEAPurge) that is set up on a load balanced, secondary eSign server runs indefinitely and does not delete files again after the initial purge.

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- When using eSign API, there is an invalid email error when the signer's email address does not contain all lowercase values.

- In certain scenarios when Process Sessions on All Browsers is enabled, there is an error when attempting to reprocess an XML session that has a document reviewed/signed by a party but has unlocked fields for another signer.

eSign RTS Features

- During installation, the service pack checks to see if any dependency processes are running, allows the installer to stop those processes, and then allows the installer to continue installing the service pack so that all DLL files are updated successfully.

eSign RTS Bug Fixes

- In certain scenarios, adding or updating a party or creating fields for an existing party in Document Designer may result in duplicate signature field names, which may cause missing signature fields during in-person and remote signing.

- An eSign purge task (TEAPurge) that is set up on a load balanced, secondary eSign server runs indefinitely and does not delete files again after the initial purge.

- Sessions cannot be processed and templates cannot be edited when documents have an internal ProductID greater than 99999.

- When using eSign API, there is an invalid email error when the signer's email address does not contain all lowercase values.

- eSign API does not allow a session to be submitted with an empty index field value.

eSign 2020.1.3 SP1

Prerequisites

- eSign 2020.1.3

eSign RTS Bug Fixes

- eSign Client 2020 is not able to process PDF documents from a LaserPro ZIP file if the PDF documents are from the same document template.

eSign Client (RTS) 2020.1.4

Prerequisites

- IMM eSign 2020.1.3 Server

- IMM eSign *plus* 2020.1.2 Server

Supported Upgrades

- IMM eSign Client version 2017 or higher

Bug Fixes

- Sporadically, the Search Active Sessions page cannot be launched from the eSign Client system tray icon after upgrading to eSign Client 2020.1.3.

File Transfer Web Service 2020.1.2

Prerequisites

- IMM eSign Server version 2018 or higher

Bug Fixes

- After upgrading to eSign 2018 or higher, TeAData web service (document set integration service) is not working as expected.

- IA Velocity integrations fail with fresh installations of eSign 2020 and certain upgrade scenarios (when the first version installed on the server is eSign 2018 or later).

eSign 2020.1.3

Supported Upgrades

- IMM eSign Server version 2017 or higher

- IMM eSign Server version 2015 environments can be migrated to the latest server for data only (not for processing old sessions).

eSign RTS Features

- Text extraction is improved for better precision.

eSign RTS Bug Fixes

- When printing a document from the eSign 2020 Client Printer, documents sometimes fail to upload because eSign is unable to create a PDF.

eSign Client (RTS) 2020.1.3

Prerequisites

- IMM eSign 2020.1.3 Server

- IMM eSign *plus* 2020.1.2 Server

Supported Upgrades

- IMM eSign Client version 2017 or higher

Bug Fixes

- The eSign Client does not reconnect to the eSign Server after Internet or VPN connectivity issues are resolved.

- eSign Client upgrade from version 2020.1 to 2020.1.1 required client authentication. Now, authentication is not required if the existing 2020 client is authenticated already.

eSign 2020.1.2

Supported Upgrades

Note: This is a full setup that includes all features and bug fixes from eSign 2020.1.1 SP1 and eSign Client 2020.1.1.

- IMM eSign Server version 2017 or higher

- IMM eSign *plus* Server version 2017 or higher

eSign XML Features

- The TeAPurge utility cleans up temporary files under the network service created by iDocMerge to prevent file buildup.

eSign XML Bug Fixes

- eSign installation was failing when the IMMInstall user password was changed in the database and did not match the value in eSign web.config file. Now, the eSign installation setup provides the installer with options to enter the correct

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password for the IMMInstall user or to login with system administrator (SA) credentials when it encounters a mismatch and proceeds with the install.

- eSign Server 2020.1.1 setup is incorrectly installing the secondary iDocMerge service under the local system account instead of the network service account.

- Occasionally during an upgrade, the eSign setup does not confirm that the TeAPurge and TeAWebDownload utilities have stopped and will not update them if they are still running.

- After upgrade from eSign 2019.2 to 2020.1.1, Remote Signature Download Batches and Failed Downloads reports are not accessible for administrators because the permissions to access these reports are unselected for the Administrators group during upgrade.

- When there are a lot of existing saved sessions, upgrades are taking longer than expected.

eSign RTS Features

- The TeAPurge utility cleans up temporary files under the network service created by iDocMerge to prevent file buildup.

- From Template Manager, easily replace a template's source PDF with an updated version without impacting active sessions using the template. In addition, use the Download feature prior to uploading the new source PDF to save a backup copy of your existing template.

eSign RTS Bug Fixes

- eSign installation was failing when the IMMInstall user password was changed in the database and did not match the value in eSign web.config file. Now, the eSign installation setup provides the installer with options to enter the correct password for the IMMInstall user or to login with system administrator (SA) credentials when it encounters a mismatch and proceeds with the install.

- eSign Server 2020.1.1 setup is incorrectly installing the secondary iDocMerge service under the local system account instead of the network service account.

- Occasionally during an upgrade, the eSign setup does not confirm that the TeAPurge and TeAWebDownload utilities have stopped and will not update them if they are still running.

- After upgrade from eSign 2019.2 to 2020.1.1, Remote Signature Download Batches and Failed Downloads reports are not accessible for administrators because the permissions to access these reports are unselected for the Administrators group during upgrade.

- Party definitions for a template extracted as FirstName and LastName instead of the FullName are deleted during upgrade.

eSign *plus* Features

- The TeAPurge utility cleans up temporary files under the network service created by iDocMerge to prevent file buildup.

eSign *plus* Bug Fixes

- eSign installation was failing when the IMMInstall user password was changed in the database and did not match the value in eSign web.config file. Now, the eSign installation setup provides the installer with options to enter the correct password for the IMMInstall user or to login with system administrator (SA) credentials when it encounters a mismatch and proceeds with the install.

- eSign Server 2020.1.1 setup is incorrectly installing the secondary iDocMerge service under the local system account instead of the network service account.

- Occasionally during an upgrade, the eSign setup does not confirm that the TeAPurge and TeAWebDownload utilities have stopped and will not update them if they are still running.

- After upgrade from eSign 2019.2 to 2020.1.1, Remote Signature Download Batches and Failed Downloads reports are not accessible for administrators because the permissions to access these reports are unselected for the Administrators

group during upgrade.

- Occasionally, on upgrade from 2017 and 2018, eSign *plus* does not launch and displays the error "iformspeedsql.dll is missing."

- At times during upgrade, the setup is not updating the precompiled files (.mvc and .aspx) to the latest release version, which is causing issues accessing certain pages in the product: Remote Signature Status, Workflow Builder Rules, and Workflow Service Configuration.

- During the upgrade of an environment with a large database, the setup is timing out while trying to update the titles of all existing sessions.

Ad-Hoc Documents Downloader

Prerequisites

- eSign Server 2019 or higher

Feature

- For enhanced performance, the log size is set to 2 MB.

Bug Fixes

- When the Ad-Hoc Documents Downloader downloads documents, downloading was delayed by a day or two due to Adobe Sign's filtering logic. To resolve the delay, documents are downloaded per user and then filtered by the Download Documents Submitted in Past # of Days setting instead of date descending order. For new installations and upgrades, if the Download Documents Submitted in Past # of Days setting previously exceeded 30 days, it is reset to 30 days by default.

- The Ad-Hoc Documents Downloader processed documents slowly. To improve processing speed, the Ad-Hoc Documents Downloader performs batch checks ahead of time to confirm that documents do not already exist in in the Ad-Hoc database and to confirm that documents are signed/completed. In addition, multiple users' documents are processed in parallel with multi-threading.

eSign Client (RTS) 2020.1.1

Prerequisites

- IMM eSign 2020.1.1 SP1 Server
- IMM eSign *plus* 2020.1.1 Server

Supported Upgrades

- IMM eSign Client version 2017 or higher

eSign RTS Features

- eSign Client security is enhanced.

eSign RTS Bug Fixes

- If two sessions are created at the same time by two different users using TeSignLite via TeSignLiteStub, TeSignLiteStub may return a 300 error or 400 error.

- Previously, if a printed file was greater than 10MB, it could not be uploaded. Now, if a printed file is greater than 10MB, it is split into multiple parts to allow uploading.

- Occasionally, when there were paired files in the Output folder (e.g., ARGO integrations), eSign Client took the PDFs but left behind the index data files (IDX). Now, in the Client Settings tab on the General Settings page, the "Delay for

Index File" setting is added so that when a PDF is paired with an IDX, the eSign Client will wait the set number of seconds before processing the files in the output folder to ensure that the PDF and IDX files are taken together. Set the delay accordingly based on your integration. The default value is 0 seconds.

Release Notes

2020.1.1 SP1

Prerequisites

Note: This is a cumulative patch.

- eSign 2020.1.1 Iteration 33 Server
- eSign *plus* 2020.1.1 Iteration 7 Server

eSign XML Features

- For improved clarity, the Numeric-AllowBlank and Alphanumeric-AllowBlank index field validation options are renamed to NumericOrEmpty and AlphanumericOrEmpty. If upgrading to eSign 2020 and you would like to allow empty index fields as an alternative to numeric or alphanumeric values, select NumericOrEmpty or AlphanumericOrEmpty in the Validation field on the Index Fields Maintenance page. As of eSign 2020, empty index fields are no longer automatically supported for Numeric or Alphanumeric validation.

- A scheduled task is added to ensure the iDocMerge services are restarted in the event that servers are not restarted daily.

- Remote session downloader performance is enhanced.

- On the Search Active page, the name of the "Completion Status" search criteria is renamed to "Signature Status" and the options are named "Completely Signed," "Partially Signed," and "Not Signed."

eSign XML Bug Fixes

- On the General Settings page, internal URLs are not valid in the Home URL and Custom URL fields.

- The Government ID authentication type is listed in the Skip Services field but is still displayed as an option for eDelivery after upgrading.

- Users belonging to multiple custom groups are getting an error when searching for sessions on the Search Active Sessions page.

- Sporadically, there is an issue with the scanner setting for the maximum number of pages.

- When the completion order of the signers in an eSign API session is changed and that session is sent for remote signing, there is an error stating that the remote signing order is incorrect.

- During guided in-person signing of a document that has required fields placed after the last signature field, the Next button skips the unrequired fields and the Confirm Signatures button is enabled prior to all fields being completed.

- When the session ID tag or value is not specified in the datafile for an XML session created using REST API, eSign displays an error when launching the Create New Session page.

- For a session with data fields that are signed remotely and downloaded in eSign 2019.2, eSign throws an exception while getting the status of the same session after upgrading to eSign 2020.1.1.

- Some XML documents are not displayed in Document Designer if the documents have a party but no signatures/initials fields.

- The File Transfer web service failed to retrieve the document set location when eSign is installed in a non-default location.

- When a radio button is unlocked for the signer during signing and the signer makes a change to the radio button selection, the change is not retained after signing is completed.

- Prior to processing, document preview does not show the default value for any of the fields.

- When re-processing a session with an attachment that had data fields reviewed by a party, the attachment does not load if the "Process Sessions on All Browsers (XML)" setting is enabled.

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- There is a font embedding error when a session is processed regardless of "Process Sessions on All Browsers (XML)" setting value.

- Despite the "Process Sessions on All Browsers (XML)" setting being enabled, the Starter Checks MICR font is not working when processed in Google Chrome.

- When the "Process Sessions on All Browsers (XML)" setting is enabled, the default value of the radio buttons are not displayed during document preview and during processing.

- When the "Process Sessions on All Browsers (XML)" setting is enabled, the Expression Builder field value can be overwritten.

- When the "Process Sessions on All Browsers (XML)" setting is enabled, processing a session with a PDF that has a lot of Expression Builder fields gets stuck at the "Please Wait" message.

- The default line template setting for OTG and Imagesoft imaging index systems is not including the date and time.

- While reindexing sessions, the replacement path is not applied.

- User and Group Maintenance export is displaying permission titles and permissions incorrectly.

eSign RTS Features

- For improved clarity, the Numeric-AllowBlank and Alphanumeric-AllowBlank index field validation options are renamed to NumericOrEmpty and AlphanumericOrEmpty. If upgrading to eSign 2020 and you would like to allow empty index fields as an alternative to numeric or alphanumeric values, select NumericOrEmpty or AlphanumericOrEmpty in the Validation field on the Index Fields Maintenance page. As of eSign 2020, empty index fields are no longer automatically supported for Numeric or Alphanumeric validation.

- A scheduled task is added to ensure the iDocMerge services are restarted in the event that servers are not restarted daily.

- Remote session downloader performance is enhanced.

- The informational message on the Collected Documents page is improved for clarity and a total count for Selected Documents and Available Documents is displayed for situations when there are many documents.

- When an invalid file is uploaded to Collected Documents and New Template pages, the error message is more specific: "Invalid File Uploaded."

- On the Search Active page, the name of the "Completion Status" search criteria is renamed to "Signature Status" and the options are named "Completely Signed," "Partially Signed," and "Not Signed."

eSign RTS Bug Fixes

- On the General Settings page, internal URLs are not valid in the Home URL and Custom URL fields.

- The Government ID authentication type is listed in the Skip Services field but is still displayed as an option for eDelivery after upgrading.

- When a session was created using eSign Client 2018.2 and the documents had data fields associated with parties, those data fields are displayed as unmapped after upgrading.

- If two or more parties are defined in one order in a document and then defined in a different order in other documents, the fields are mapped incorrectly, which is causing an error when the signers are attempting to confirm signatures.

- Party names are not automatically merged when the party name is in "Last Name, First Name" format in one document and "First Name Last Name" format in the other document.

- Unknown documents with fillable fields lose data when opened from Template Manager.

- The signature fields in dynamic documents are not displayed after being signed in person and are displayed in the wrong location during remote signing.

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- After a document was reviewed by a party, fields could still be edited in Document Designer.

- When a document has an incorrect email ID format extracted for the party that is corrected in Document Designer, the signed signatures are not showing in preview and during processing.

- When a session is sent for remote signing with the Complete in Any Order setting enabled and a signer's email address matches the sender's email address, a "Failed to deliver message" error occurs.

- On the eSignature Management page, print preview displays the documents that are set to Do Not Show for the party.

- Re-ordering documents with common parties defined and optional signature fields, optional signatures that were marked as required are omitted.

- When a document template has party name extractions that do not start at 1 and/or skip party numbers, party actions are incorrect.

- When the completion order of the signers in an eSign API session is changed and that session is sent for remote signing, there is an error stating that the remote signing order is incorrect.

- The eSign API URL extracted from the GET URL method is expiring after 180 seconds instead of 60 seconds.

- Sporadically, there is an issue with the scanner setting for the maximum number of pages.

- Users belonging to multiple custom groups are getting an error when searching for sessions on the Search Active Sessions page.

- User and Group Maintenance export is displaying permission titles and permissions incorrectly.

- After clicking Select All and then clicking Export Template on the Document Maintenance (RTS) page, only the templates displayed on the Document Maintenance (RTS) page are exported.

- A non-administrative user with "Group Member Can Create and Manage Templates" permissions cannot access the Imaging Indexes tab on the Document Maintenance (RTS) page.

- While reindexing sessions, the replacement path is not applied when Enable Imaging Index Service Client is used.

- When a custom function that contains errors in the input (e.g., MODIFYDATETIMEFORMAT()) is submitted for remote signing, the errors prevent remote signing.

- When a document is archived and indexed, the index XML file does not contain vocabulary that was passed in the data.

- The default line template setting for OTG and Imagesoft imaging index systems is not including the date and time.

- If the dictionary code is changed from lowercase to uppercase, the system does not recognize an existing template from the same dictionary and is resulting in an error.

- If using Windows Authentication to log in, the Partner Alias tab is displayed on User Maintenance page.

Release Notes

2020.1

Supported Upgrades

- IMM eSign Server version 2017 or higher
- IMM eSign *plus* Server version 2017 or higher

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.

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- 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.

  o There are additional toolbar items that make designing documents easier, such as alignment and snap-to-grid tools.

  o The new Fields area lists all of the fields in a document for easy navigation.

  o Delete a signer and all fields assigned to that signer with one click.

  o The user experience is improved when reviewing signer assignments, unmapped fields, and optional fields.

  o 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.

  o 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.

  o 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.

  o 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,

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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.

  o There are additional toolbar items that make designing documents easier, such as alignment and snap-to-grid tools.

  o The new Fields area lists all of the fields in a document for easy navigation.

  o Delete a signer and all fields assigned to that signer with one click.

  o The user experience is improved when reviewing signer assignments, unmapped fields, and optional fields.

  o 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.

  o iPads using the Safari web browser are now supported.

- The **Search Active** page is updated.

  o From the **Search Active** page, customize your search to filter the results based on **Completed**, **Partially Completed**, and **Not Started**:

  o When **Completed** is selected, search results display sessions that have had all signatures, initials, reviews, or required data fields completed.

  o 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.

  o When **Not Started** is selected, search results display sessions that have no signatures, initials, reviews, or required data fields completed.

  o 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.

  o 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.

  o 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:

  o As part of the eSign Client install, only the eSign Server URL is required.

  o Optionally include Adobe Reader, SigPlus, camera, and scanner during installation.

  o In-House Installations:

  o When set to Create and Activate, users will be prompted for their password during their first login or if the password is reset.

  o 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.

  o When set to Do Not Create, login will fail and an error is logged because the user does not exist.

  o For upgrades, it is recommended for users to reset their eSign account password.

  o Hosted Installations:

  o It is recommended that the FI ID is unique.

  o Users will need the FI ID and password to log in.

  o When set to Create and Activate, users will be prompted for their password, which the FI Admin should share, on the first login.

  o 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.

  o 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.

  o 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.

  o From the **Template Manager** page, define elements of the template such as document properties, indexes, signer information, fillable fields, signatures, and initials fields.

  o Add radio button groups using Template Manager.

  o 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.

  o 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.

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- 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

- 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.

- 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

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(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.

  o There are additional toolbar items that make designing documents easier, such as alignment and snap-to-grid tools.

  o The new Fields area lists all of the fields in a document for easy navigation.

  o Delete a signer and all fields assigned to that signer with one click.

  o The user experience is improved when reviewing signer assignments, unmapped fields, and optional fields.

  o 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.

  o iPads using the Safari web browser are now supported.

- The Search Active page is updated.

  o From the Search Active page, customize your search to filter the results based on Completed, Partially Completed, and Not Started:

  o When **Completed** is selected, search results display sessions that have had all signatures, initials, reviews, or required data fields completed.

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  o 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.

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Release Notes

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.

- 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

- 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.

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Release Notes

- 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.

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