eSign Cloud
Introduction

Using this Guide

The self-paced learning approach to the implementation of IMM eSign provides an institution with control over the pace at which its employees will learn the materials needed to understand, implement, utilize, and support their solution.

This guide serves as a reference tool as well as a companion guide to the series of **short** videos in each lesson. Additional supporting materials such as check lists, to do lists, glossaries, configuration/settings logs, etc. may be referenced and will be provided to you. IMM recommends that all institution employees are provided access to the videos, guide, and other materials.

Overview

The Introduction Stage is intended to be used to set a ground level of understanding for all institution employees who will be part of the implementation project team or need to understand the implementation at a high level. These may include IT staff, managers, directors, C-level decision makers, and subject matter experts. Much of the detail covered in this stage will also be included in the User Preparedness stage which will be used primarily by end users who are not in a project or decision maker role.

The following **lessons** are included in this stage:

1. Welcome to the World of IMM eSign
2. eSign through your eyes
3. eSign through the eyes of your customer
4. eSign end-to-end demonstration
5. Elements to consider as you begin your eSign project
6. The implementation process—what to expect—how to prepare

After watching the videos in this stage, you should:

- have a good understanding of what eSign is
- understand how eSign fits in your business process(es)
- be able to describe the essential functions of eSign to someone else
- feel comfortable having discussions on how your institution will use eSign
- understand what the steps are in the implementation process

IMM recommends that each member of your designated implementation team watch all the videos first and that you then come together as a team for a high-level conversation about roles and responsibilities, schedules, and scope.

Activity Checklist

- Identify members of your implementation team
- Complete all lessons
- Download and complete Customer Profile
- Submit Readiness Form
- Participate in Kickoff meeting

IMM/eSign

Lesson 1: Welcome to the World of IMM eSign

In this first lesson, you will get an initial overview of IMM eSign. See the ways in which IMM eSign will enable you to easily provide electronic signature options to your consumers.

Learning Objectives

- Understand the basics of eSign
- See how eSign fits in with your institution's business processes
- Become familiar with the flow of documents from business system to signer to archive

Key Elements

- IMM is a technology company that focuses exclusively on helping Financial Institutions
- eSign is an IMM product that enables your institution to capture customers' legal signatures on electronic copies of documents either in person or remotely, using a computer or mobile device
- IMM eSign makes this process as simple as printing documents from your computer
- IMM eSign makes the process for the signer easy and convenient

Glossary

Session: a set of documents kept together like a folder or envelope. Used to organize the documents that need to be signed or displayed to the signer(s). The session allows the employee to have the signing party view and sign documents either in person or remotely.

Remote Signer: When a signer is not present in branch. The session is "delivered" to them using their email address so they can sign documents wherever they are.

Two-factor Authentication: Two-factor authentication is an extra layer of security designed to ensure that the intended signer is the only person who can access and sign documents. Different methods are available: one-time passwords, text codes via smartphones, KBA, and Government ID.

KBA: Knowledge-based Authentication. This type of authentication requires that a remote signer answer questions about themselves in order to prove their identity.

Signing Ceremony: The activity of the consumer signing the documents in the session. Can take place in person, remotely, or a combination of both.

Next steps

In Lesson 2 we will learn more about how IMM eSign works from your vantage point.

IMM eSign

Lesson 2: eSign through your eyes

Welcome to your second lesson. Now that you have seen the ways IMM eSign lets you to provide electronic signature options to your consumers, it's time to start familiarizing yourself with how you'll interact with the eSign solution. In this lesson's video you'll learn the basics about what you'll do as you interact with eSign.

Because there are so many ways in which you might utilize eSign and so many options, for now we'll focus on a single use case and only a few of the options you might use.

Learning Objectives
- Understand how documents will move from your business system into eSign
- See how you'll work with an in person signer to sign their documents
- See what you'll do to send documents to a remote signer

Key Elements
- Sending document from your business system to IMM eSign is easy
- Signers who are present will use a signature pad and view their documents electronically
- With an email address and phone number you can send documents to remote signers easily

Glossary
Use Case: one set of possible sequences of actions between systems and users and related to a particular goal or business process

Virtual Printer: an application that can be chosen from the standard print dialogue that will send the selected document(s) to another other application (IMM eSign in this case) rather than to a physical device.

Attachment: A copy of a document or image that can be added to a session (e.g., Driver License, copy of deed, etc.).

Signature pad: A device that electronically captures a person's handwritten signature on a touchpad using a pen-type stylus. This term may be used interchangeably when referring to any device that may be used to capture a signature, such as signature tablet or tablet display, or by a brand name such as Topaz or Wacom. Once captured, digital signatures are applied to electronic documents.

Mark: Another term for an electronic signature or initials captured from the signer and applied to a document.

Disclosure Statement: A standard statement that all signers must agree to before applying their signature(s) to electronic documents.

Next steps
In Lesson 3 we will learn more about how IMM eSign works from the vantage point of the signer.

Lesson 3: eSign through the eyes of your customer

This third lesson in the Introduction stage will let you get a glimpse of the eSignature experience from the signers' perspective and round out your high-level overview of IMM eSign.

Because there are multiple ways in which the signer might utilize eSign, for now, we'll focus on a single use case and only some of the options they might see.

Learning Objectives
- Understand how a signer will navigate eSign
- Learn the fundamental elements of the signing experience
- Be able to describe the signing experience to a signer

Key Elements
The in-person/in-branch signer will be able to see the documents they are signing and will use a signature device to capture their signature

Signers will agree to a disclosure statement before electronically signing their documents

Remote signers are able to sign documents using their smartphone, tablet, or computer and the process is simple

Glossary
No new terms introduced in this lesson

Next steps
In Lesson 4 we get to see the IMM eSign software in action and learn about a few more options.

IMM/eSign

Lesson 4: eSign product demonstration

Welcome to your first walkthrough of the IMM eSign software. The lesson will use the use case of two people applying for an auto loan where one applicant is present in branch while the second applicant is remote.

Learning Objectives

- Have a good sense of what the software will look like in your institution and how you will use it
- Understand the flow of documents from the business system to IMM eSign to the signer and then to the archive
- Begin to think of specific ways your institution will utilize IMM eSign

Key Elements

- Sending documents to IMM eSign from your business system is as simple as sending them to a printer.
- IMM eSign allows you to review and add additional documents as needed before starting the signature process.
- The IMM eSign interface is user friendly and straightforward

Glossary

No new terms introduced in this lesson

Next steps

In Lesson 5 we will introduce some additional concepts not yet explored in the previous lessons in order to help your team be better prepared for the initial discussions as the project kicks off.

IMM/eSign

Lesson 5: eSign additional elements

Now that you have an understanding of the fundamentals of the eSign product, it's important that you start thinking about and discussing additional elements that will need to be considered as we dive into your eSign implementation. This lesson will help guide you in those needed discussions.

Learning Objectives
- Understand the basics of User Authentication and Permissions
- Understand what a template is and how it relates to your business process
- Understand what an attachment is and how it relates to your business process
- Be able to discuss the different two-factor authentication options
- Understand search indexes/keywords
- Be able to discuss the current institution imaging or ECM system

Key Elements
- User authentication requires LDAP for Azure Active Directory
- User accounts facilitate the connection to remote signature based on user email address
- User permissions determine the features and functions users can access – user groups help streamline these permissions
- The four types of two-factor authentication have specific distinctions that should be considered early in the implementation
- Documents are identified by document type and indexes
- IMM eSign will send documents to the institution's imaging or ECM system after the signing ceremonies are complete

Glossary
LDAP: A centralized storage place for usernames and passwords that allows many different applications and services to validate users

Azure Active Directory: An LDAP compatible cloud-based identity and access management service from Microsoft

Authentication: Term used to describe a user having access to a system or application

Permission: A term used to indicate a user's right to perform a task or access a certain area of an application once authenticated

Next steps
In Lesson 6 we will start discussing what needs to happen for your institution to be ready to begin your IMM eSign project.

IMM/eSign

Lesson 6: Preparing for Implementation

Now that you have identified your implementation team and made some initial decisions, we'll take a little time to give you an overview of the implementation process. You'll learn about the various stages, the resources you'll have available, and the requirements you will need to have at the ready.

Learning Objectives

- Be prepared to formally kick-off the IMM eSign implementation project with your IMM Project Manager
- Understand the stages of the implementation process
- Understand your role and responsibilities in the implementation process

Key Elements

- The implementation process is broken up into discrete stages
- Each stage has a component of self-guided learning and a consultation with an IMM eSign specialist
- Components of IMM eSign will be installed in your environment after the completion of the second stage
- Each stage contains required activities that the institution's implementation team will be responsible for completing prior to the consultation

Glossary

No new terms introduced in this lesson.

Next steps

Now that you have completed the six lessons comprising the Introduction stage of your IMM eSign implementation, you're almost ready to meet with your IMM Project Manager for a kick-off meeting.

To request the kick-off meeting first download and complete the customer profile. Next, complete the Readiness Form located on the STAGE 1: Introduction page, making sure you upload the Customer Profile on the 2nd page and answer all questions. Your IMM Project Manager will contact you to set up your kick-off call.

Congratulations! You're on your way to experiencing the convenience of IMM eSign

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Assignments

All team members complete all Lessons including viewing the videos located on the eSign Cloud Onboarding website.

Team Project Manager to complete the Customer Profile Form and submit it by attaching it to the Readiness Form located on the Stage 1: Introduction page of the eSign Cloud Onboarding website.

What's Next?

Schedule Kick-Off call with your IMM Project Manager and the members of your institution's team. It is recommended that all members attend if possible.

Begin exploring Stage 2: Getting Started, which will dive deeper into the various elements that make up eSign, to prepare your team for installation and configuration.