eSign Cloud
Getting Started Guide – Archives and Imaging Systems

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 fifth lesson in Stage 2: Getting Started—eSign Components & Installation Requirements.

After watching the video located on the lesson page use the materials at the end of this guide to assist you and your team in making and documenting initial decisions and processes and to help you prepare for the initial installation activity.

The guides in this Stage should be used in concert with the Implementation Workbook, which will serve as a single location for documenting and maintaining your decisions.

The lessons in Stage 2 will enable you to:

- Increase your understanding of the most important elements of eSign
- Prepare for and document your initial implementation
- Make decisions about how to set up user rights and permissions
- Make decisions about the signer experience both in branch and remotely
- Understand the installation process and your roles and responsibilities

Overview

As we draw closer to the installation activity, it is imperative that your team have a complete picture and understanding of the system and requirements for your IMM eSign system. Given the fact that your system is cloud-based, the number of on site requirements are minimal, yet no less deserving of your attention. At the conclusion of this lesson you should have a good understanding of these requirements and be prepared to discuss any questions with your IMM Implementation Consultant.

The key elements of this lesson are:

- IMM eSign is a browser-based application—what browsers are supported and what are some considerations
- The eSign client install
- Installation of the Imaging Index Service described in Lesson 4
- The initial installation activity—what to expect and how to prepare

And after watching the video you should be able to:

- Determine what browser your institution will utilize for IMM eSign
- Identify any areas of confusion or concern to discuss with your IMM Implementation Consultant
- Identify a server to be used to run the Imaging Index Service
- Confirm the identities of the team that will participate in the installation activity and the workstation(s) that will be used

Activity Checklist
- Watch the Lesson 5: Components of eSign and Implementation Requirements
- Consider the questions posed in the lesson (they're reiterated in this guide)
- Enter information into the Environment tab of the Implementation Workbook and validate information in the other tabs
- Submit the Implementation Workbook with your Readiness Form from the Stage 2 webpage: https://www.immonline.com/onboarding-esign-cloud-rts/stage2/

IMM/eSign

User Workstations

The System or Technical Components of the eSign Cloud architecture are very straightforward and are referenced in the IMM eSign for Cloud Environments: System Requirements document located here: https://www.immonline.com/wp-content/uploads/IMMeSignCloud-SystemRequirements-1.pdf

User workstations running Windows 10 (professional or enterprise) as well as thin client workstations such as Citrix XenApp and XenDesktop are supported.

Browsers

Since IMM eSign is a browser-based solution we highly recommended that all user workstations utilize the same browser – standardizing not only makes your support easier, but it also addresses some common situations that can arise when mixed browser environments are being utilized. IMM eSign is supported on IE 11x, Edge, Chrome, and Firefox. (Note, Edge is still being tested as of April 2021, with no issues yet identified.)

It is generally a good idea to keep your browsers up to date. Since many institutions continue to utilize Internet Explorer 11 due to line-of-business applications' dependencies, IMM eSign will continue to support it for the foreseeable future.

There may be nuanced differences with how certain browsers handle printing and with how certain signing devices may interface with browsers, so as we discussed in an earlier lesson, it will be important to understand the support levels of not only eSign and your business applications but of your peripheral devices as well and standardize.
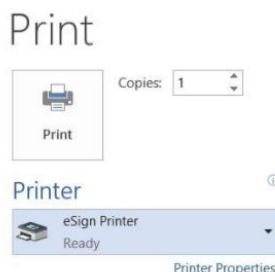
eSign Client

Although IMM eSign is browser-based, it still relies on a small piece of software that is installed on user workstations.

Once installed the small IMM eSign tool primarily lives in and is accessed from the workstation's system tray. It runs invisibly to most users and yet serves as an easy way for them to access the eSign Collected Documents page (*Show Documents*) or *Search Active* documents. (Choosing those options launches the chosen web browser and brings the user to their IMM eSign cloud site).
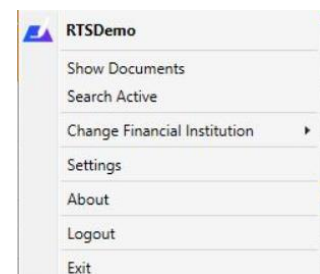
Virtual Printer

The other portion of the client installation is the eSign Virtual printer, which enables the "ready to sign," or RTS, functionality that you have been learning about. The eSign virtual printer will display in the Windows printers settings and will allow the user to send a document to eSign for processing from any application that has a print dialogue.

The eSign Client install process is quick and easily maintained by the institution's IT department.

Server

Once again, since the IMM eSign Cloud process is managed almost entirely in the IMM Cloud, there is little need for your institution's computing resources. However, there is one component required that we have mentioned several times, and that is the Imaging Index Service—sometimes referred to as the downloader or download service.

Imaging Index Service

This small application will run as a *service* on a server in your institution's data center and will retrieve the completed, or "closed," sessions from the IMM Cloud based on a schedule set up using the Windows Scheduler. Once retrieved using a secure connection, the files will be placed in a dedicated location, generally on the same server and generally in an *IMM/Archive* folder.

Once retrieved, the files are ready to be archived to your imaging system as we discussed in the previous lesson.

Your installer will help you with the initial setup during the installation activity, so be sure you have identified a server onto which you'll place the Imaging Index Service and that someone with administrative rights to that server will be on the installation activity call.

Installation Activity

After you have completed this lesson and had some internal discussions with your project team, you will be ready to submit your Readiness Form to your IMM Project Manager who will then schedule your Installation activity.

That activity will include the following items:

- Establishing the MS Azure AD connection
- Installation and setup of the Imaging Index Service on a server in your environment
- Installation of the eSign Client components on a designated testing/training workstation
- Verifying access to the Adobe Sign portal
- Creating a test templated document
- Fully testing a transaction with the test template, to include
  - generating the source document from your chosen business system and printing it to eSign,
  - signing the document as an in person signer and then as a remote signer, and
  - seeing that document retrieved to the archive folder on the Imaging Index Service's server.

Installation Users and Resources

To facilitate the installation activity, it will be imperative that certain resources are ready—both people and technology.

You must have a **designated workstation** that will be used for the installation and initial test as well as for ongoing testing and training. You will be able to test and train on multiple workstations, but at least one should be identified for interactions with IMM Implementation team members. That workstation should also be able to connect to a web conferencing session.

IMM eSign

The **user** logged into that workstation must have **permission** to install software (or an administrator must also be on the call to enter needed credentials)

The installation workstation must have access to the **business system** that will provide the source documents, and one of the attendees must have **expertise** in the business system to generate the source document being used to test.

If a **signing device** will be used, it should be installed and configured on the workstation prior to the installation activity.

The designated **eSign Administrator** MUST be on the installation activity call as should be the **Document Administrator** if that is a different person.

Additionally, the MS Azure **Global Administrator** must be on the call to facilitate the link process described earlier and if different, an **IT resource** who will facilitate the installation and configuration of the Imaging Index Service in your institution's infrastructure must also be on the call.

The designated **Adobe Administrator** must be on the call as should any additional **subject matter experts** identified by your team.

Yes, this is an important activity with multiple attendees, some of these may be the same person:

- ✓ Institution Project Manager
- ✓ Business System user/Subject Matter Expert(s)
- ✓ Azure AD Global Administrator
- ✓ IT Resource
- ✓ Adobe Administrator
- ✓ eSign Administrator
- ✓ eSign Document Administrator

You will receive an invitation from the IMM Installer reiterating these pre-requisites and should ask them or your IMM Project Manager any clarifying questions.

IMM/eSign

Questions to Consider

Who will be the IT resource responsible for the technical components of the installation?

Are there any unique infrastructure settings that may make a software installation challenging in our environment? (If so, please let us know as soon as possible.)

Do all user workstations meet or exceed the System Requirements?

On what browser have we chosen to standardize?

What signing device(s) will be used?

What server will be used to run the Imaging Index Service? What retrieval schedule should be employed?

Begin answering and documenting these decisions in the Implementation Workbook.