



eSign Cloud

System Administration: Navigating and General Settings

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 first lesson in Stage 3: System Administration—Navigating and General Settings.

You should watch the video located on the lesson page and use this document as a reminder of what you learned and perhaps a place to make notes and identify areas of question or concern.

The guides in this Stage will also include recommended activities for steps that should be taken when setting up your eSign solution.

The lessons in Stage 3 will enable you to:

- Configure many elements your IMM eSign Cloud solution with the exception of Templates/Attachments
- Continue making decisions about how your users will interact with eSign
- Continue making decisions about how your customers will interact with eSign
- Understand the options in Adobe Sign that will affect the remote signing experience

Overview

Now that your installation activity is successfully complete, you have access to your eSign solution and can begin setting it up.

As with any new software application, there is an adjustment period of becoming comfortable with the components, options, and navigation of the solution. This first lesson covers basics around navigating the IMM eSign application and online documentation and will present the General Settings configuration screens.

The key elements of this lesson are:

- Accessing and navigating the IMM eSign cloud application on the desktop
- Exploration of the help menu and online documentation
- Thorough presentation of the general settings
- Enablement of your eSign System Administrator to set options according to your solution needs

And after watching the video you should:

- Understand how to launch IMM eSign in all situations
- Be able to search for online help on a specific topic
- Configure your IMM eSign system's general settings

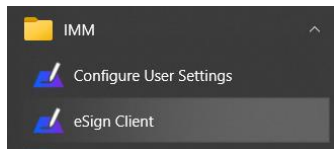
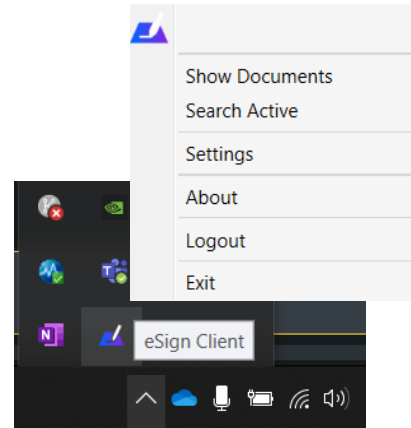
Activity Checklist

- Watch the Lesson 1 video
- Explore the online help documentation to get familiar with how it is organized and how to perform searches
- Go into the General Settings area of Administration. Make any desired changes, and take note of any questions or concerns you may have

Accessing eSign

Accessing eSign for most users will be as simple as sending a document from a business system or desktop application. Sometimes, however, you will need to open eSign without adding a new document.

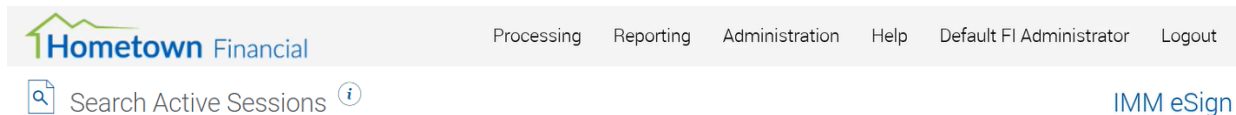
In most cases, eSign will automatically start and log you in when you sign into your workstation and in the system tray (bottom right corner) you will find the eSign Client icon. Right-clicking on it will open the menu seen here which allows you to launch a browser at the chosen location in eSign.



If eSign does not automatically log you in, or you do not see this icon or menu you can launch eSign from the Start Menu by selecting the eSign Client from the IMM Program group. This will place the client option in the System tray.

Navigation

The header of the eSign screen will look similar to this



The logo you supplied or that you upload will appear in the upper left corner. Below that will be the page title and in some cases a small “i” that, upon clicking, will provide some basic information about navigating the page that you’re on—describing icons and the like.

In the upper right portion of the page are the menus. Depending both on your institution’s setup as well as a user’s access rights you may or may not see all menus or all options in each menu.

The menus include:

Processing access to open existing sessions, access collected documents, and go to saved websites.

Reporting contains access to multiple management level reports.

Administration again depending on user rights provides access to administrative settings, including General Settings, Document Templates, Indexes, Users, Groups, Imaging, and more.

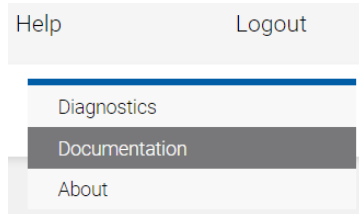
Help contains an access point to documentation as well as diagnostic and about information.

User this menu is labeled as the user’s UserID and is a way to view user account settings.

Logout is important to use when the user is done with their eSign session.

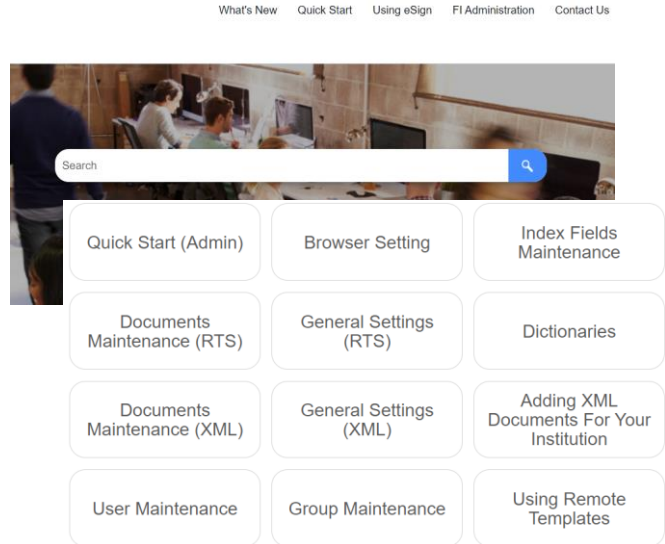
Help Menu

Nearly every function and option of eSign are documented in the eSign Help Documentation. Users are shown a user specific assortment of help topics based on their permissions.



There are various support topic categories as well as a search bar.

Keep in mind that you may see some options that do not necessarily pertain to your implementation. One such item that could cause some confusion is “XML” and “RTS,” and you might also see “eSign Plus”. These are different “flavors” of eSign used by different institutions. If you are uncertain which flavor you are using, ask your IMM Project Manager, but a general rule of thumb is that banks will utilize RTS and credit unions will utilize XML. However, this is not an absolute.



You can either browse using the categories and menus or use the text search.

Searching

After opening the Help→Documents screen you can type a word or phrase into the search bar—this is often the most effective way to search. A good rule of thumb is to use the exact language on the page or option you’re searching about.

Your search for "Remote Attachments" returned 27 result(s).

Remote Attachment Template

Remote Attachment Templates are groups of attachment definitions that can be associated with discrete processes (Car Loan, Home Loan, etc.). The Remote Attachment Template can be applied to any or all individual document signers in a session on the eSignature Management page. Refer to eSignatures ...
C:\Fa\Fa\Maint\RemAtt\Tpl\Remote Attachment Template.htm

Requesting Remote Attachments

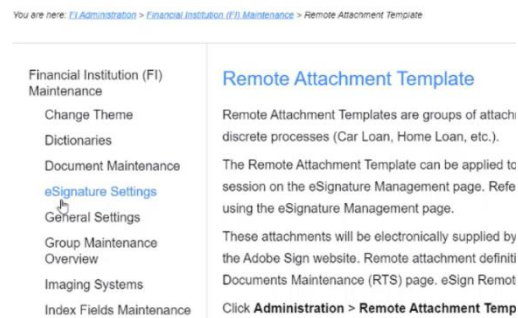
Supporting documents such as pay stubs, W2s, Driver License, Passport, etc. can be requested as required from a remote signer using the Request Attachments option on the Document Designer page or the eSignature Management page. Prior to requesting attachments, a signer must be designated to sign ...
Procedures/DocumentDesigner/RequestingAttachments.htm

Remote Signing

eSign provides a simple, guided process to sign and review documents remotely. Instead of signing in each signature field in each document, the signer creates a signature that is used throughout the entire signing process. Once the signature is created, the signer must accept the signature to ...
Procedures/Signing/RemoteSigning.htm

Search results will display as a list of topics showing the category into which the result fits as well as a snippet of the text from the page.

Click on one of the links to open the actual documentation page.



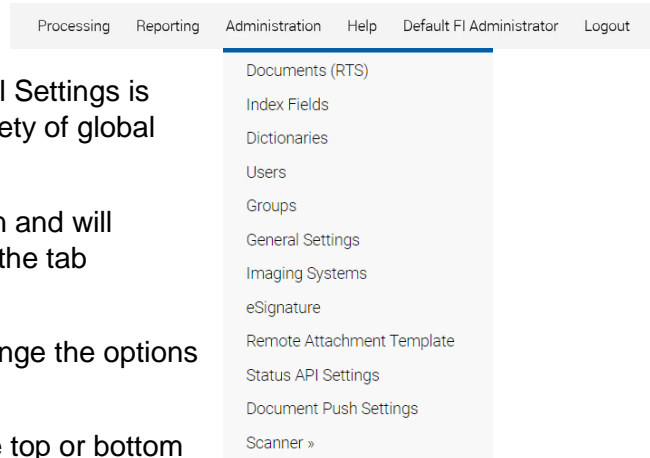
Once on a documentation page, utilize the Windows keyboard shortcut CTRL+F to open a search box. If you enter text into the Search bar at the top of the page you will perform a new global help search. You can also see a list on the left which shows where in

the documentation this topic falls, click on any other topic that might interest you.

There are multiple topics available in the menus at the top of the help screen: some are more user focused and some are more administrative in content. Please note, not all topics will be relevant to your implementation.

General Settings

The General Settings option from the Administration drop down menu displays the General Setting screen shown below. General Settings is where the system administrator can set a variety of global system settings.



The fields in the upper section are all common and will display at the top of this screen regardless of the tab selected at the bottom.

There are tabs which, when selected, will change the options in the lower section.

To make changes on this page whether at the top or bottom you will always start by clicking EDIT to unlock all fields.

NOTE: Not all settings shown here will be available for your institution and will depend on options and add-ons used during your installation. Also some fields may only be edited by an IMM installer or support admin.

A screenshot of the 'General Settings' page in the IMM eSign system. The page title is 'General Settings' with a gear icon. The top right corner shows 'IMM eSign'. The main content area contains several input fields and controls:

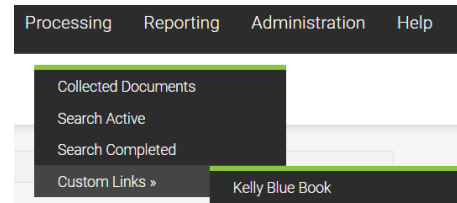
- Home URL:
- Custom Label 1:
- Custom Label 2:
- Custom Label 3:
- Custom Logo:
- Custom URL 1:
- Custom URL 2:
- Custom URL 3:
- Documents Key:
- Retain Audit Trail (Days):
- Session Audit Report Time Zone:
- Password Unlock Period:
- Unknown Document Label:
- Define Image-Based Documents:
- Allowed Domains:

At the bottom, there is a row of tabs: Add-Ons, Archive, Check In/Out, eSign Zip, eSign Client, and Platform Settings. Below the tabs are three buttons: (with a pencil icon), (with a floppy disk icon), and (with an X icon).

Header section

Home URL creates a link to a website to which users will be taken when the institution logo in the client is clicked – this could be used to direct to your intranet if you like.

Custom Label (1-3) and **Custom URL** (1-3) are used to add links to the Processing → Custom Links menu – in the example in the video, we added a link to Kelly Blue Book simply by entering the label and the URL. These fields could also be useful as quick links to an intranet site.



Custom logo is how your system administrator can upload your institution's logo if that has not already been done. The allowable formats are GIF or PNG and eSign will automatically resize the logo to be 45 pixels high – it is best to size your logo appropriately prior to uploading to avoid any performance issues.

Documents Key is used in *CSi* processing and should be entered by an IMM support resource.

Retain Audit Trail is the number of days eSign retains the audit information in the database tables – the default and maximum is 90 days. Note that your *session* audit files will be archived along with your sessions and *this* value is only for running the internal audit report which provides only limited tracking of activities within eSign.

Login Retries Allowed is the number of tries allowed for a user (between 3 and 10) before the user's Active flag is unchecked. This is often not applicable as most environments utilize active directory authentication (such as eSign Cloud).

Auto-Unlock Password allows that a user will automatically be unlocked the next time they log in so long as the Password Unlock Period has passed. Again, this option is often not applicable.

Password Unlock Period (which is measured in minutes) is the amount of time the user will have to wait before their password is automatically unlocked, if Auto-Unlock Password is checked. This option is often not applicable, and the range of minutes is from 10-3600 minutes.

Session Audit Report Time Zone set the time zone used in the session audit reports which are different from the audit trail report (referenced above). The session audit report document is created for each session and generally archived with the session documents.

Unknown Document Label is what a source document uploaded to eSign will be labeled when a template cannot be applied to it. Unknown is the standard value.

Define Image-Based Documents is a setting used by eSign RTS that allows defining and editing image-based (OCR) documents. When not selected, only PDFs with readable text can be used for template recognition. This setting requires an IMM resource for activation.

Allow domains is also used by eSign RTS systems and is a list of domains allowed to log into the eSign client. This setting can only be accessed by an IMM installer or support representative.

Add-Ons tab

Add-Ons	Archive	Check In/Out	eSign Zip	eSign Client	Platform Settings
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Retain Active Sessions (Days):

Archive on Session Expiration (Completed Sessions):

Retrieved Session Default: Preserve original selection All documents selected No documents selected

Use common scanner:

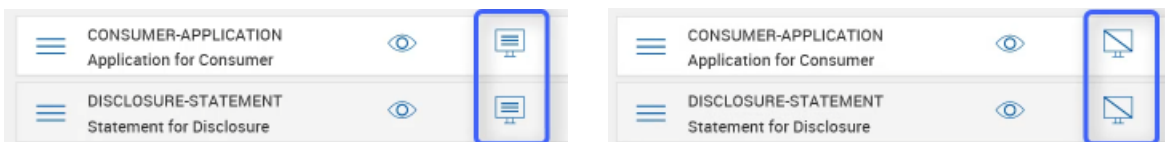
Expand Session Details Indexes by Default:

Download Documents for Session Status (Days):

Retain Active Sessions (Days) determines the number of days before an active but unsigned session is retained before it is deleted. When a new session is created by a user, it remains active until it is fully signed and archived which makes it then closed or completed. If a session is not fully signed or archived, it will remain active. This can be set between 30 and 90 days.

Archive on Session Expiration will automatically archive completely signed sessions. This may be confusing as it says “Completed Sessions” but it means completely **signed** sessions.

Retrieved Session Default determines the state of the document display icons used to set which documents display for document processing. This does **not** impact which documents display to the signing parties. When an active session is retrieved and the document display options were changed when the session was open previously, *Preserve original selection* will honor those selections. *All documents selected* and *No documents selected* set the options as either all selected or all deselected as we see in the examples in the lesson video (and below).



Use Common Scanner is a setting for institutions in a thin client environment and is generally deselected.

Expand Session Details Indexes by Default determines the look of a session screen to the institution user. With this selected, each document in the session list will be expanded to show the index values. This could offer a good reminder to users to check index values but is often left unchecked. Users can always expand the document details manually.

Download Documents for Session Status determines the number of days physical, archived documents are stored in eSign after they are indexed before they are purged. This setting does not impact the database records and the default is 365 days. Since nearly all institutions will be archiving to an imaging system, this can be set to a much lower value if desired.

Archive tab

The screenshot shows the 'Archive' tab selected in a navigation bar. Below the navigation bar are three buttons: 'Edit', 'Save', and 'Cancel'. The main settings area includes three checkboxes, all of which are checked: 'Encrypt Archived Documents', 'Auto-fill indexes on Session Details', and 'Retain Archived History Docs(Days)'. The 'Retain Archived History Docs(Days)' setting has a text input field containing the value '360'. A blue button labeled 'Download Imaging Index Service' is positioned to the right of the 'Retain Archived History Docs(Days)' setting.

Encrypt Archive Documents protects archived PDF documents by encrypting them. By default, this is turned on and it is not recommended that it be turned off. If it is changed, a password must be entered and would be supplied by IMM Support.




Retain Archived History Docs represents the number of days that the DATA about archived documents is kept in the eSign database. The default is 360 days but can be as long as 2555 days (7 years). This setting does not impact the number of days archived documents are maintained by eSign which was set on the Add-Ons tab.


Auto-fill indexes on Session Details will fill index field information missing from individual documents from index field information extracted from other documents in the session's document set. When not checked, missing field information will not automatically be populated, but the user will still have the option of clicking the Fill Indexes link. This setting only applies to RTS documents and sessions.



You may see a button in this tab to **Download Imaging Index Service**. It is recommended that you consult with your IMM Installer and/or refer to the help documentation for more information on this download option.

Check In/Out tab

Add-Ons	Archive	Check In/Out	eSign Zip	eSign Client	Platform Settings
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 Edit  Save  Cancel

 Check Out

 Check In  Browse

Use this page to extract and/or install the file(s) needed to support custom fields specific to your FI.
When you **Check Out** the files, a Zip file will be created which you will be able to download to your local computer. This file may then be sent to your Customer Support representative.
When you **Check In**, you may specify a single support file or a zip file containing one or more of these support files. They will automatically be placed in the proper location for use by the program.

The Check In/Out tab is used to download and/or upload the file(s) needed to support custom fields and functions specific to your FI.




The most frequently used of these is referred to as the “parameters file.” Whenever you need to make changes to the parameters file you should use this tab to check it out (download it) first. (Unless this is the first time you’re creating it, in which case your IMM Specialist will help you create the file for the first time.)

Click the **Check Out** button which will download a ZIP file to your workstation. Open the file within the ZIP and make and needed changes to it and save it to your desktop with the same file name (e.g., parameters.txt). Once the file is updated (or replaced) and saved, use the **Browse** button to access it and then use the **Check In** button to upload it back into eSign.

As with all changes, you must click the **Edit** button first to start and then the **Save** button once you are done.

eSign Zip tab

Add-Ons	Archive	Check In/Out	eSign Zip	eSign Client	Platform Settings
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 Edit  Save  Cancel

Zip Handler Assembly:




Zip Handler Class:

Zip Handler Password:

This tab is only available/applicable with certain implementations. If it is required, your IMM Specialist will set this up for you.

eSign Client tab

Add-Ons	Archive	Check In/Out	eSign Zip	eSign Client	Platform Settings
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 Edit	 Save	 Cancel
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Input Folder 1:	<input type="text" value="%InstallPath%\Output"/>
Input Folder 2:	<input type="text" value="C:\IMM\ManualOutput"/>
Static Output Folder:	<input type="text"/>
Document Expiration (Minutes):	<input type="text" value="20"/>
Default Browser:	<input type="text" value="Chrome"/>
Access Valid for (Days):	<input type="text" value="365"/>
Delay for Index File (secs):	<input type="text" value="0"/>
Enable User Level Settings:	<input type="checkbox"/>

It is unlikely you'll need to make and changes on this tab. These are universal settings that will apply to all eSign clients in your Institution. If necessary, users can be given the rights to alter their own settings, but this is not generally the case.

Input Folder 1 and 2 are the locations where documents uploaded or printed using the virtual printer will be placed for eSign to import.

Static Output Folder is only used for integration with a single institution platform and will be blank by default. If needed, your IMM Specialist will advise you.

Document Expiration is the number of minutes a document that has been sent to eSign but NOT added to a session is retained for use. After the time limit is reached the document will be purged and no longer available in the Collected Documents page.

Default Browser is the browser used to launch the Collected Documents page. If the selected browser is not available on the user workstation, the user's workstation default browser will be used.

Access Valid for (Days) manages long-term access authentication It is unlikely this setting will be used by your institution.

Delay for Index File is used when a PDF is paired with an index file for processing and eSign will wait for X number of seconds before importing. This setting is only used with certain specific implementations and your IMM Specialist will advise you accordingly.

Enable User Level Settings determines if users can locally edit eSign Client settings. This is uncommon and only recommended in limited circumstances.

Platform Settings tab



This tab will likely display the message shown above and is only used with certain specific implementations and your IMM Specialist will advise you accordingly.

Recommended Activities

Determine setting values as a project team.

Document these decisions in the Implementation Workbook.

Make desired changes in your eSign system's General Settings page.

Note any questions or concerns you have so that you can ask your IMM Product Expert during the consulting/training session.