



eSign Cloud

System Administration: Setting Signing Options

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 fourth lesson in Stage 3: System Administration—Setting Signing Options.

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

The actual process of a person signing documents electronically has a certain flow and requirements. In this lesson we will briefly review the elements already introduced and then look at where the settings are configured in both eSign and Adobe Sign.

The key elements of this lesson are:

- A brief review of the signing elements, considerations, and permissions
- Walkthrough of the eSignature Settings screens, options, and areas of discussion
- Introduction of the Adobe Sign administrative screens and considerations

And after watching the video you should:

- Develop a robust understanding of the signing process both in person and remote
- Apply your institution's decisions around signing in the IMM eSign configuration screens
- Apply your institution's decisions around remote signing in Adobe Sign
- Record any questions your team has to discuss with your IMM Solution Specialist

Activity Checklist

- Watch the Lesson 4 video
- Review the information you entered in the Implementation Workbook regarding signing decisions (Signing tab of workbook) and make updates, changes, additions as needed
- Go into the eSignature area of Administration and explore the settings and options to familiarize yourself with them. Take note of any questions or concerns you may have.
- Review the Adobe Sign Help pages. The link to these is found on the Stage 3/Lesson 4 webpage and will direct you to <https://helpx.adobe.com/sign/user-guide.html>

Signing Elements

In previous lessons, you have learned about signing considerations and user permissions set in eSign including those surrounding signing.

Remember, users can sign documents either in person or remotely and when in person, they will generally use some sort of device: signature pad, pen display, or tablet, or possibly use the “keyboard” method which we sometimes call “click to sign.” The in-person user will need to consent to certain terms, create and apply their electronic signature, and confirm their signatures.



The Remote signer will utilize Adobe sign, with which eSign is integrated. They will use their own device (whether a computer, tablet, or cell phone) to also agree to terms, create and apply their electronic signature, and confirm their signatures. They'll also be able to apply their signature using different methods, such as drawing on their device or using their smartphone, type, or upload an image.

In addition, there are various two factor authentication methods available for the eSign user and your institution can administratively decide which methods your users will have access to.

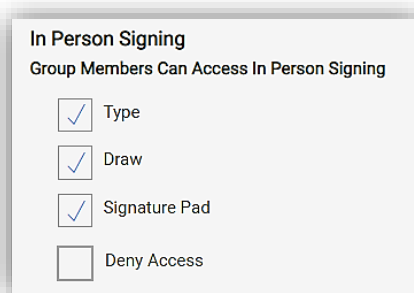
Other than those settings and the institution user's email being set as their default, the rest of the remote signing options (such as the language in the consent and the methods of signing) are set by your Adobe Administrator in the Adobe Sign system **directly**. This lesson takes a look at some of those settings in addition to the eSign settings.

In Person Signing

There is a single permission type for In Person Signing which determines which methods, if any, an eSign user has when working with an in-person signer. This is in **both** the User and Groups permissions.

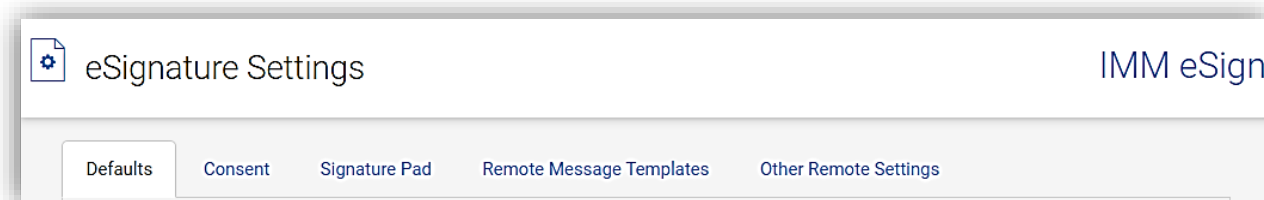
Additional signature settings managed in eSign are located under the **Administration** menu by selecting **eSignature**.

The eSignature Settings page has five tabs.



In Person Signing
Group Members Can Access In Person Signing

<input checked="" type="checkbox"/>	Type
<input checked="" type="checkbox"/>	Draw
<input checked="" type="checkbox"/>	Signature Pad
<input type="checkbox"/>	Deny Access



eSignature Settings

IMM eSign

Defaults Consent Signature Pad Remote Message Templates Other Remote Settings

Remember, you can always go to Help | Documentation and search for “eSignature Settings” if you’d like to review the online documentation.

eSignature Settings

Defaults tab

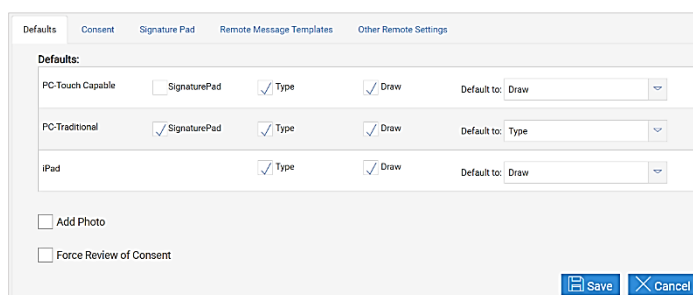
Set the available signing methods and default method that will be used when the eSign institution user is utilizing one of the three workstation types displayed here: PC Touch Capable (e.g., surface pro tablet), PC Traditional (e.g., desktop or laptop), or iPad.

The options for signing are

- Signature Pad
- Type
- Draw

Use case: If your employees utilize standard PCs and some employees will have signature pads and others will have pen display signature devices, you may choose to select only SignaturePad and Draw as available options. By not selecting Type, employees will not have the option to utilize the keyboard to type in a name in place of a signature. The option chosen as the default will be just that, and the employee will be able to change the method if needed.

Add Photo enables the Add Photo button on the eSignature Consent page so that employees can capture a photo of the signer to include with their electronic signature.



Defaults Consent Signature Pad Remote Message Templates Other Remote Settings

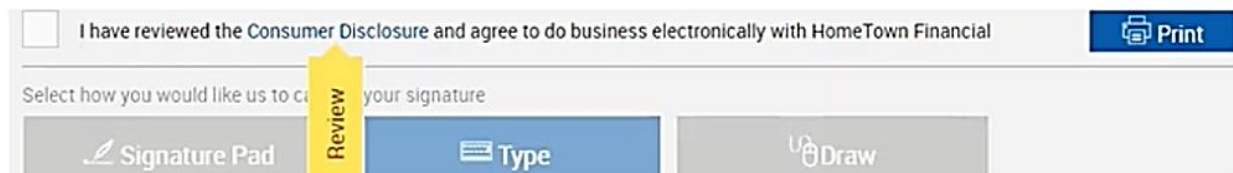
Defaults:

PC-Touch Capable	<input type="checkbox"/> SignaturePad	<input checked="" type="checkbox"/> Type	<input checked="" type="checkbox"/> Draw	Default to: Draw
PC-Traditional	<input checked="" type="checkbox"/> SignaturePad	<input checked="" type="checkbox"/> Type	<input checked="" type="checkbox"/> Draw	Default to: Type
iPad		<input checked="" type="checkbox"/> Type	<input checked="" type="checkbox"/> Draw	Default to: Draw

☐ Add Photo
☐ Force Review of Consent

Save Cancel

Force Review of Consent will require that the user click on the Consumer Disclosure link in order to indicate that they reviewed and agree to your institution's consent language.

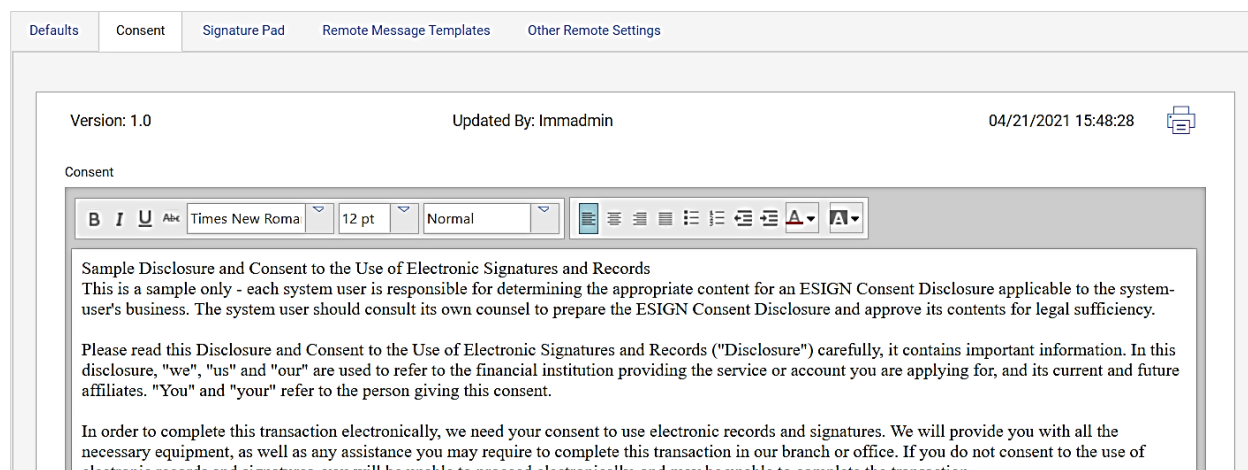


After making changes on this tab be sure to click Save.

Consent tab

By default, there is wording provided in the Consent dialogue. This is only a **sample** and your team should verify the contents meet with your institution standards.

When you update the consent language, either type directly in the box, or copy and paste from Notepad. Copying and pasting from Word or other word processor may inadvertently copy in embedded control characters and result in undesired effects. The formatting bar at the top of the window provides the ability to add text formatting as desired.



Note that the fonts used may not be compatible with all display devices. Testing is imperative.

After updates are made and the Save button is clicked, the Version number will increment, and the old version will be a new line on the screen so that you can go back to it if needed. Just click on the line to expand the details. The version number will also be shown in the audit report when a signer signs a document in person.

The **Notes** section below the consent language is there if you would like to keep track of changes or any other relevant information about the version.

Additionally, we are required by law to provide you with certain information in this transaction "in writing" which means you have a right to receive that information on paper. However, with your consent, we may also provide this information to you electronically.

Notes

Save

Cancel

As always, don't forget to click save after making changes.

Signature Pad tab

Here, the administrator sets what the user sees when a signer is utilizing a signature pad during an in person signing session and how the signing process will flow. These settings are specific to signature pads and do not apply to other signing devices.

Defaults

Consent

Signature Pad

Remote Message Templates

Other Remote Settings

☒ Display messages on signature pad (Supported with IE Browser only)

☐ Operator must click "Next" to navigate the signature pad user to the next signature field.

☐ Operator must click "Sign", "Click Here to Sign", "Review", and/or "Confirm Review" to prompt the signature pad user to sign or review.

☐ Turn Off the Backlight after Signing

Consent:
I, %SignerName%, have reviewed the provided Disclosure and Consent and agree to the Terms of Use.

Signing or Reviewing Message:
I, %SignerName% %MarkAction% %CurrentDocumentName%.

Importantly, as of the writing of this document, display messages on the signature pad is only supported with the IE Browser. As signature pad manufacturers implement support for other browsers in the future, IMM will enhance the functionality accordingly.

When *Display messages on signature pad* is selected, messages appear on signature pads during the in-person signing process giving signers more control ultimately enabling a faster signing process. When this setting is not selected, the signature pads are blank and are only used to capture signatures and initials.

Operator must click "Next" to navigate the signature pad user to the next signature field results in the employee needing to click **next** in order to move the signer from field to field. When not selected, the user will automatically be routed through the documents.

Operator must click "Sign", "Click Here to Sign", "Review", and/or "Confirm Review" to prompt the signature pad user to sign or review also requires the employee to click and prompt the signer to act on the item.

Turn off the backlight after signing will turn off the signature pad backlight after the signature pad user has completed the signing experience.

There are three message templates that can be set that will display for the signer on applicable Signature Pads: Consent, Signing or Reviewing Message, and Confirm Signing or Reviewing Messages.

Consent:
I, %SignerName%, have reviewed the provided Disclosure and Consent and agree to the Terms of Use.

Signing or Reviewing Message:
I, %SignerName% %MarkAction% %CurrentDocumentName%.

Confirm Signing or Reviewing Messages:
I, %SignerName%, confirm that I %MarkAction% the %DocumentSetName% document set.

Save Cancel

The messages can contain both static text and what are called **monikers**. Monikers are variables that will put unique text in their place.

- For Consent, the only available moniker is: %SignerName%
- For Signing Message, the available monikers are: %SignerName%, %CurrentDocumentName%, %MarkAction%, and %MarkType%
- And for Confirm Signatures, the available monikers are: %SignerName%, %DocumentSetName%, %MarkAction%, and %MarkType%

Remote Message Templates tab

This tab is used to create customized message templates for the emails signers receive when being notified of a signing session or when receiving documents via eDelivery.

Defaults Consent Signature Pad Remote Message Templates Other Remote Settings

Total Records : 2
Selected : 0

+ Add Delete

Select All

<input type="checkbox"/>	Template Title: Default Template	Message Subject: %DOCUMENTSETNAME% (for %SIGNER%)	✓ Default	🗑
<input type="checkbox"/>	Template Title: Testing Docs	Message Subject: %DOCUMENTSETNAME% (TESTING)	✓ Set as Default	🗑

To expand the details of a template, click on a template line.

This screenshot shows a configuration window for a template. At the top, there is a 'Template Title' field with the value 'Default Template' and a 'Message Subject' field with the value '%DOCUMENTSETNAME% (for %SIGNER%'. To the right of these fields are a 'Default' checkbox (checked) and a trash icon. Below these fields are two text areas: 'Signing Message' and 'eDelivery Message', both containing the text 'Your documents are available for viewing, signing and printing.' At the bottom right, there are 'Save' and 'Cancel' buttons.

When the user selects a template at the time of sending a session for signing or documents for eDelivery, they can still modify the language if needed to customize or personalize the message.

Signing Message will be used when the email is being sent from the eSignature Management page

This screenshot shows the 'eSignature Management' page. At the top, there is a header with 'eSignature Management' and 'IMM eSign'. Below the header, there is a navigation bar with 'Design', 'Request Remote Attachments', and 'Back' buttons. The main content area shows a card for 'HALEY WALKER' with a printer icon and fields for 'Email' (demo@email.com) and 'Phone' (555-555-4444). Below this is a 'Message Details' section with fields for 'Sender' (timk@immonline.com), 'CC' (Select CC), 'Template' (Default Template), 'Subject' (Document Set (for HALEY WALKER)), and 'Message' (Your documents are available for viewing, signing and printing.). At the bottom right, there is a 'Send' button.

eDelivery Message will be used when an email is being sent using the Delivery option:

This screenshot shows the 'eDelivery' page. On the left, there is a green 'Delivery' button. The main content area shows a card for 'HALEY WALKER' with a printer icon and a field for 'Email' (email@email.com). Below this is a card for 'WILL IAM NELSON FARMS'. Below the cards is a 'Message Details' section with fields for 'Sender' (timk@immonline.com), 'CC' (Select CC), 'Template' (Default Template), 'Subject' (Document Set (for HALEY WALKER)), and 'Message' (Your documents are available for viewing and printing.). At the bottom right, there is a 'Send' button.

Like with the consent page, when entering message text you should type directly in the box or copy from Notepad and not copy and paste from Word as embedded control characters may cause erratic behavior.

You can see from the example above that the monikers of SignerName and DocumentSetName can be used in the message subject line. The SignerName will be the full name of the first party

in the session and not necessarily the signer receiving the email. The DocumentSetName will use the Default Product Type Name which we will see on the next tab. (**Note**, this option is more relevant with other eSign products and isn't necessarily useful in this setting. For clarity, simply using static text here is recommended.)

Use the *Set as Default* button to indicate which template will be the default for all users. The other templates will appear in a drop-down list, so naming them in a useful way in the Template Title field is important.

Use the **+Add** button to create a new template.

If you need to delete a template, you can use the trash can icon at the template level or place a check mark in the box or boxes of the templates you wish to delete and click the **Delete** button at the top of the tab.

Other Remote Settings tab

Sender's Email provides a way to enter email addresses that will appear in the Sender and CC drop down lists when sending a document set for eSignature or eDelivery. By default, eSign will fill the sender field with the current user's default sender's email (which does NOT need to be in this list). However, the user may select a different sender email address or add CC addresses if needed. Note that just like the user's email addresses, these email addresses must be activated with the Adobe sign system to be utilized as the Sender. In most cases, these email addresses must also utilize the same email **domain**; however, if you have more than one domain you may add additional CC domains in this box:

Note: it is **not** necessary to add all user's email addresses to the Sender's Email list.

Sender's Email:

<input type="checkbox"/>	Email	Delete
<input type="checkbox"/>	Edit bobtest@email.com	
<input type="checkbox"/>	Edit Bryce.Hometown@immonline.com	
<input type="checkbox"/>	Edit mball@immonline.com	
<input type="checkbox"/>	Edit tim.kanaley@immonline.com	

Additional CC Domain:

CC user receive notifications and can access documents like Sender

Default Product Type Name:

Document Set

Alternate signature pattern:

LightsOut Settings:

LightsOut Default Email:

LightsOut Default Service:

Email Verification

The options below the email list and CC domain are not frequently utilized.

Default Product Type Name is the field used to populate the Document Set Name moniker when a document set name is not otherwise provided by your host system.

The additional three options used only in very specific circumstances and will be set or addressed by your installer or consultant.

As always, click save if you've made any changes.

Remote Signing

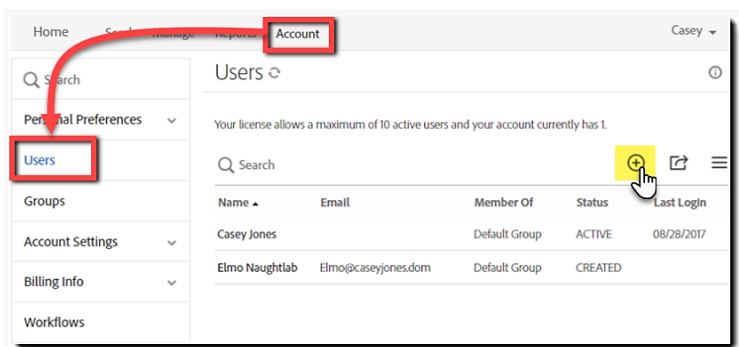
Adobe Sign

The designated Adobe Sign administrator at your institution will receive a link from IMM that they will use to access Adobe Sign. In Adobe sign, your administrator will need to ensure that all your users have been set up with their email address that matches the value in eSign in the Default Sender Email field in User Maintenance.

Adding Individual users

To add a single user to your Adobe account, log in and navigate to the Users section of the Account tab.

Click on the plus sign and enter the user's email address, first and last name, and assign them to the default group on the *Create a user* tab



Adding users in bulk

Use the *Create users in bulk* from the same Create Users screen.

You will use a simple CSV file and you can download the sample CSV file and change it accordingly.

All you will need to worry about is Email Address, First Name, and Last Name.

	A	B	C
1	Email Address	First Name	Last Name
2	JohnDoe@emaildomain.com	John	Doe
3	CeliaDoe@emaildomain.com	Celia	Doe
4	FredDoe@emaildomain.com	Fred	Doe

There is a handy “Learn More” link on the tab as well if you would like to explore.

Once you have your CSV of users to upload, you'll simply browse to it and click Import. If you're just adding new users, you can select just the "Allow Create Users" option.

When users are set up in Adobe Sign, they will receive an email with a link to confirm their account and set their password which they **must** do before their account is active.

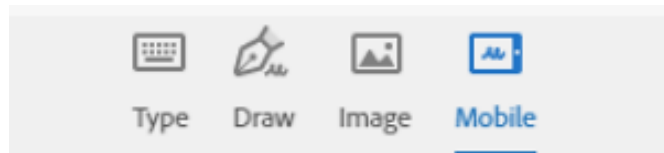
Additional Adobe Sign settings

Signature Preferences

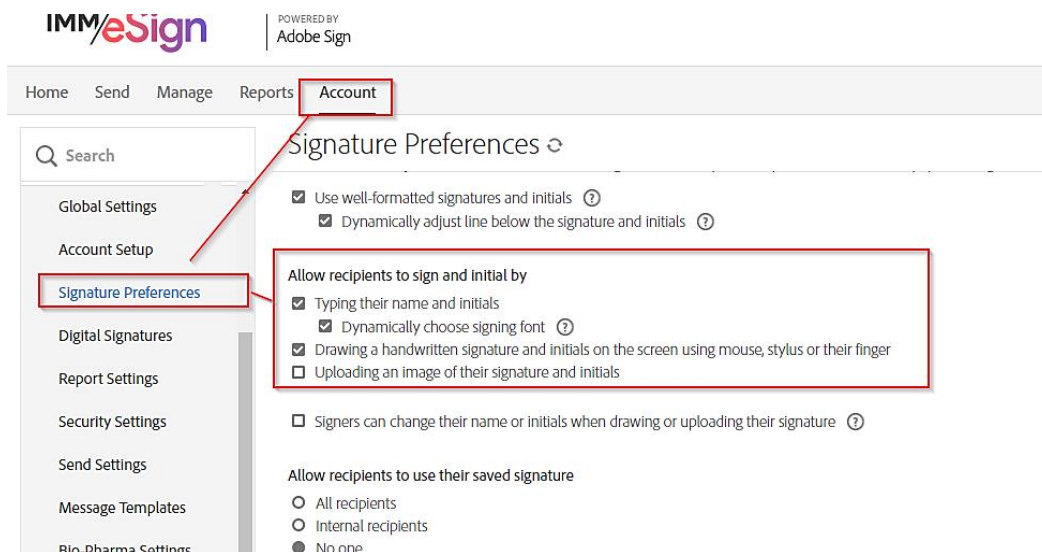
After users are authenticated to Adobe Sign using the two factor authentication method chosen by the user, they will have options for how their signature will be captured.

This illustration shows the 4 possibilities:

- Type
- Draw
- Image
- Mobile



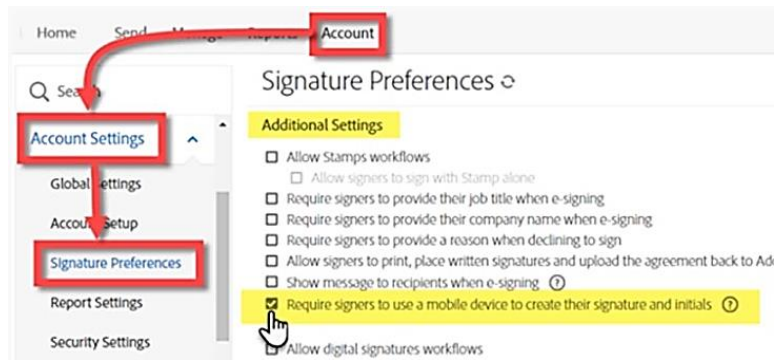
To determine what you'd like your signers to see you will access Signature Preferences from the Account tab. There you will see "Allow recipients to sign and initial by ..."



If you would not like your signers to type, but prefer they use some capture method you can deselect "Typing their name and initials."

Drawing and **Uploading an image** options will also enable the Mobile option that is referred to as "Cross-device Signature capture." This allows a signer on a desktop or laptop to send an SMS text to their mobile device with a link to *create* a signature, *capture* just the signature, and then *relay* that signature image back to the document on the desktop or laptop system.

You can **MANDATE** that signers use the Cross-device Signature capture by enabling MANDATORY Mobile Signature. It is unlikely you'll want to mandate this, but if you do, you can set *Require signers to use a mobile device to create their signature and initials* in the Additional Setting section of the Signature Preferences section (toward the bottom).

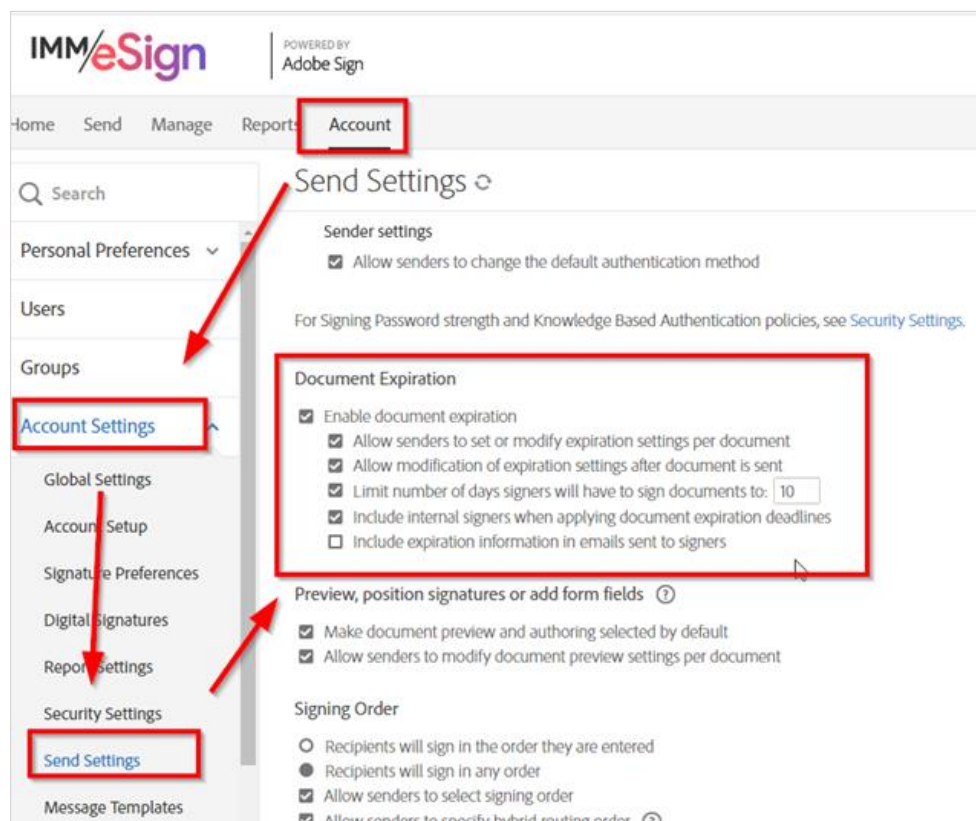


Enabling this over-rides the existing *Allow recipients to sign and initial by settings*.

Document Expiration

A common question we hear is, “How long will the remote signature link be good for?”

The default is 10 days, but this can be changed under Account Settings, Send Settings, *Limit number of days signers will have to sign documents to*: as shown here.



Adobe has a robust help environment that you can access at helpx.adobe.com and your IMM Project Manager can always point you to additional information you may need.

Recommended Activities

Determine what signing options and settings your institution will require to both enable and control your employee and signer interactions.

Document your decisions either in the Implementation Workbook or another location.

Apply your institution's decisions in the eSign configuration screens and in the Adobe Sign settings.

Review the Adobe Sign Help pages (<https://helpx.adobe.com/sign/user-guide.html>).

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