



eSign Cloud

System Administration: Additional Administrative Topics

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 3: System Administration—Additional Administrative Topics.

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 preceding lessons in this Stage have covered nearly every aspect of the administrative settings available in the IMM eSign system and touched on Microsoft Azure Active Directory and Adobe Sign elements. In this lesson tie up a few loose ends and get you ready for your Consulting session followed by Stage 4: Templates and Attachments.

The key elements of this lesson are:

- Examine the remaining areas of IMM eSign not covered in the preceding lessons in this Stage, namely, Dictionaries|Select Default Attachment Type, Status API Settings, Document Push Settings, Scanner Settings, Help|Diagnostics, and About)
- Exploration of IMM eSign Reports
- Recap of Stage 3
- Discussion of items for Review

And after watching the video you should:

- Have a complete understanding of (or at least familiarity with) the System Administration configuration tools
- Assess your team's level of comfort with the materials and record any questions or areas of confusion
- Configure your solution according to your new knowledge, understanding, and decisions made
- Prepare for your Consulting/Training session with an IMM Solution Specialist

Activity Checklist

- Watch the Lesson 5 video
- Review the materials in this document
- Complete the Readiness Form and be sure to include your list of questions or concerns for your upcoming consulting session.

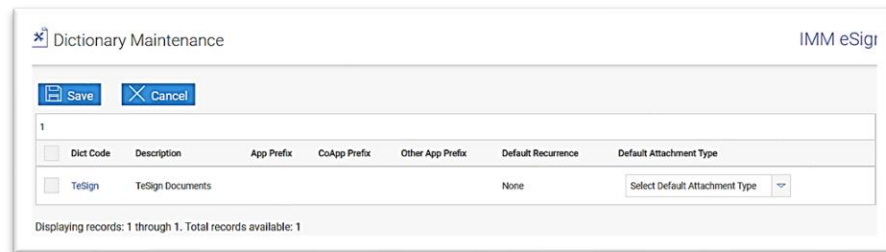
Remaining Menu Items

Thus far we have covered almost all administrative options—the options in the Processing menu will be covered in detail in Stage 5: User Preparedness and the Reporting items will be covered below.

The Administration menu has been our primary focus and we are holding off on the Documents (RTS) item and the Remote Attachment Template item until Stage 4 when we teach you about templates and attachments. But there are a few other items in the Administration menu that we have yet to cover: Dictionaries, Status API Settings, Document Push Settings, and Scanner.

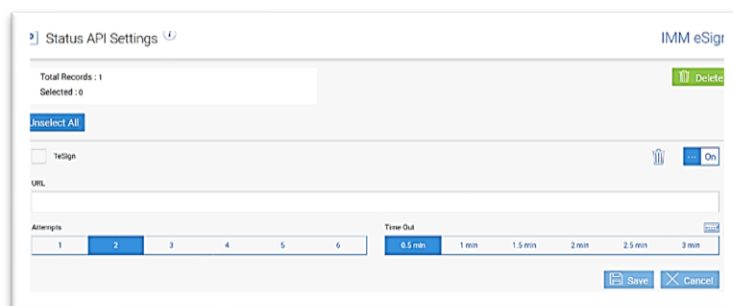
Dictionary Maintenance

The Dictionaries option allows the Administrator to view or modify certain dictionary settings. That said, as we mentioned in the lesson on indexing, you will most likely only have a single dictionary, the default, which is called TeSign, so there's nothing to concern yourself with here. That said, a **Dictionary** is a set of information that maps certain values pertaining to indexes and documents between specific host systems and imaging systems. If it is relevant to your implementation, your IMM Specialist will be sure to address it with you.



One item on this page that can be helpful even if you're just using the default TeSign dictionary is *Default Attachment Type*. Since we haven't learned about Attachments much yet and haven't set any up yet, this drop down will most likely be blank. However, once you have some attachment types created, you can set the **default** type that will be displayed on the Add Documents page when your users are processing sessions—and that is done here.

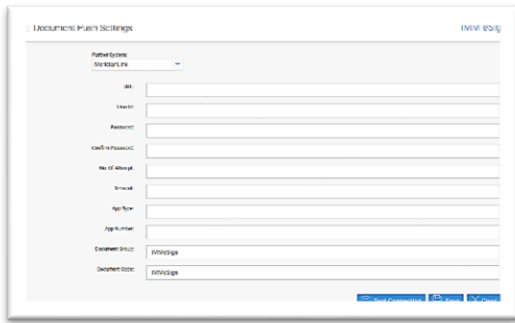
Status API Settings and Document Push Settings



These two items are used when an implementation that will take advantage of the IMM eSign API toolkit. Only certain business systems currently utilize the eSign API and your IMM Specialist or Installer will set these up when needed. For your knowledge, notifications are automatically generated when there are changes

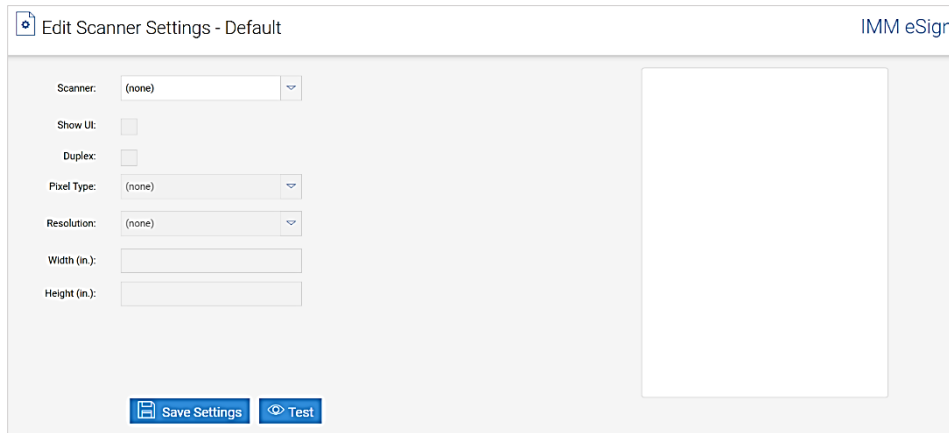
in a Session's status and those notifications can be sent to an application or service managed by the institution, and this Status API settings page provides the settings used to specify where

the notifications should be sent, how many attempts should be made and what the time out values should be. Messages pushed can include information about downloading PDF documents and audit reports.

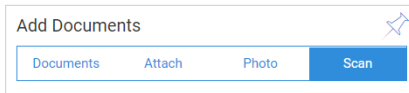


Document Push Settings similarly works with implementations utilizing the eSign API and is only used at this time with Meridian Link/ML and nCino. If your institution is using one of those systems, your IMM Specialist will review or make these settings for you.

Scanner

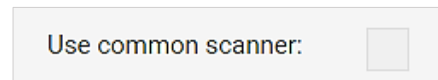


If your institution will employ a scanner at the user workstation, it can be used to add attachments directly in a session.

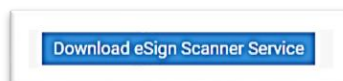


There is a setting in General Settings called “Use common scanner” which you may recall we said is only used in thin

client environments. If Use common scanner is checked the scanner settings that will apply globally are set here, and the user is not prompted with the Scanner settings



page when attaching a document. However, if it is not checked, the user will be prompted. Either way, settings entered in the default Scanner Settings will be the defaults in both situations. Prior to using a scanner or even configuring this setting, the scanner service must be installed on the user workstation and can be downloaded from the scanner settings dialogue using this button.



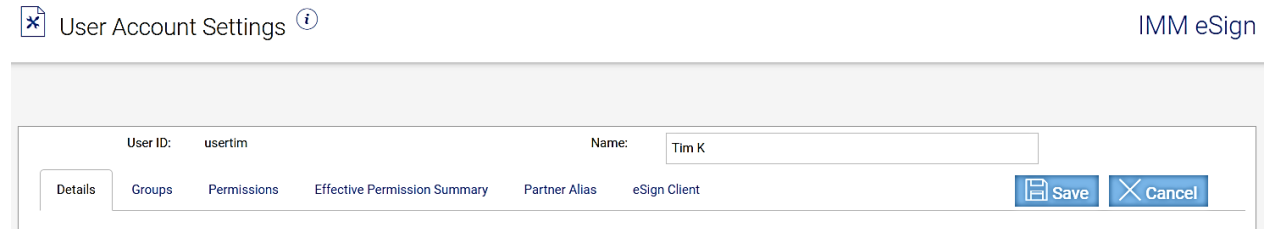
Also note, the first time a user attempts to use a scanner they may be prompted to install a small TWAIN driver if it has not already been done. The scanner settings overall are self explanatory.

Help Menu

Under the Help menu you have access to Documentation, but there are other options called **Diagnostics** and **About**. These are both informational only and may come in handy during any support efforts.

User Menu

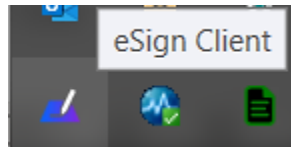
The User menu will be labeled with your user name. Under it is an option labeled User Account Settings. This displays the current settings and permissions for the user to the user.



Logout Menu

The Logout Menu is actually simply an single click to log out of the system.

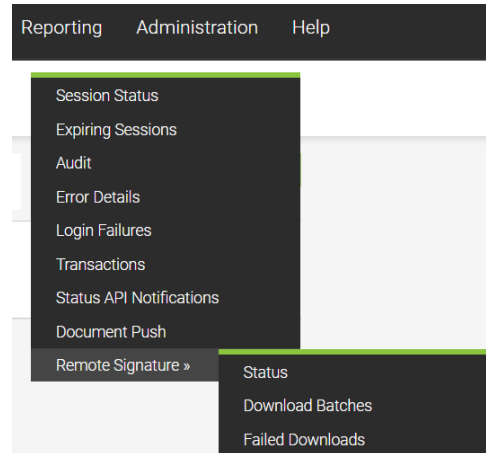
It is advisable to use Logout when you wish to Exit eSign to avoid any inadvertent session or document locks. You can always reaccess eSign from the eSign option in the system tray:



Reporting

There are twelve administrative reports available in IMM eSign and they are listed here.

1. Audit
2. Login Failure
3. Session Status
4. Status API Notifications
5. Remote Signature Status
6. Error Details
7. Transaction Based
8. Expiring Sessions
9. Document Push
10. Remote Signature → Status
11. Remote Signature → Download Batches
12. Remote Signature → Failed Downloads



Access to the reports is set in the User or Group permissions, and in many cases, standard users will not need access to any of these reports.

Rather than walking through each report, we recommend taking some time to navigate through them after you have begun testing and have some data in your system. These reports draw information from the eSign database and are not generally used to find or report on documents or sessions specifically.

Reports will have different parameters that can be used to run them, and they can be exported in CSV format for further data analysis if desired.

Each report is discussed in detail in the Help Documentation and if you should have additional questions, don't hesitate to reach out to your IMM team.

Stage 3 Recap/To Do List

This stage has been filled with a large amount of information and it may take your team a while to digest it all. In this stage we have covered the Help documentation materials available to you from within the eSign application as well as the totality of the General Settings. We covered the User and Group permissions and settings including MS Azure Active Directory considerations. The exploration of archiving and imaging systems showed you what is possible and likely generated more questions than answers. And finally, the signing options lesson showed you where to set your device settings, consent language, and how to work with Adobe Sign.

- Lesson 1 – Help and General Settings
- Lesson 2 – User and Group Settings
- Lesson 3 – Archiving/Imaging System Settings
- Lesson 4 – Setting Signing Options

Now it's time for Teamwork!

Once the members of your project team have watched the lessons, we recommend that you get together as a team, have conversations, make decisions, and configure the items with which you are comfortable. In the case of **Index and Imaging** items, you may not be able to make those decisions completely until after you've worked with your imaging vendor or in house imaging system administrator and begun learning about and setting up your eSign Templates.

Be sure to record your decisions and your settings somewhere – we recommend using the Implementation Workbook. This will give you something to reference moving forward.

Activities

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

Complete the Readiness Form and be sure to include your questions/concerns.

Schedule and participate in the Administrative Consultation/Training session

Buckle up for Stage 4: Templates and Attachments