



eSign Cloud

Templates and Attachments Guide

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 lessons in Stage 4: Templates and Attachments. This guide is a combination of the smaller guides provided within each lesson.

The purpose of Stage 4 is to build upon the preceding Stages and finally learn the specifics around how to create Templates and Attachments and how to manage those “Documents” in eSign. During this Stage you will learn how to, and also begin to, set up the templates that will be used by eSign to recognize documents being generated from business systems and uploaded to eSign. All the specifics of template design will be explored and your project team will begin setting up templates on their own prior to the consulting engagement with an eSign template expert. Although it is most important for your designated Document Administrators to master the information in this stage, we recommend that all members of your implementation team engage in all the training elements of Stage 4.

The guides in this Stage should be used in concert with the Implementation Workbook, which serves as a single location for documenting and maintaining your decisions. By this point in the onboarding process, you should have downloaded and entered a significant amount of information into the workbook. However, if still needed, the workbook can be downloaded from the main Stage 2 website.

The lessons in Stage 4 will enable you to:

- More fully document the specifics of the templates and attachments you will be creating
- Create new templates and attachment types
- Be able to discuss the specific needs your institution may have with your IMM specialist

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Lesson 1: Review

Overview

Throughout the onboarding training thus far, we've seen examples of templates and talked about the components of templates.

This lesson serves as a brief review and reminder of what we've learned so far in preparation for the deep dive that the remaining lessons will present.

The **eSign document administrators** for your institution must pay particular attention to the lessons in Stage 4. However, we also recommend that all members of the project team watch the videos so that everyone knows what is possible, and how templates are managed.

The key element of **this** lesson is to provide a refresher on templates, attachments, and indexes.

After watching the video, you should:

- Be prepared to embark on the specifics of template and attachment creation

Activity Checklist

- Watch the Lesson 1 video
- Explore the online help documentation to familiarize yourself with information available there specific to templates and attachments
- Record any questions your team has for discussion with your IMM Solution Specialist

What is a Template

A template is a set of instructions corresponding to a specific type of document that will be sent to eSign for processing.

Previous lessons have shown that eSign will “recognize” documents when they are “printed” or otherwise moved from a business system or other source into the eSign application.

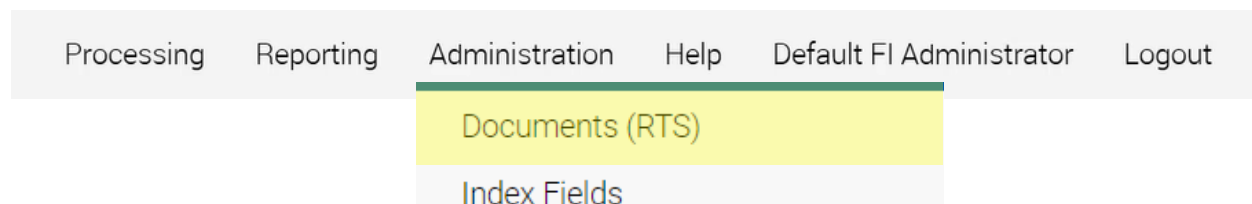
The recognition is accomplished using **TEMPLATES**. Templates are a set of instructions, or a collection of information, that are set up and administered by the institution both initially during implementation and ongoing as new types of documents are added or existing documents are changed. Therefore, having Document Administrators is so important.

Templates are used **first** to identify a Source Document and assign the correct Document Name (e.g., “Signature Card” or “Loan Application”). Once recognized, eSign is then able to use the template definitions to perform other functions:

- **Indexes** (such as names, account numbers, social security numbers, and dates) can be captured from the text on the document.
- **Signature** and/or **Initial** field locations can be identified along with the **Signing Parties’** names that they correspond to
- **Data Fields** can be placed on the template to enable the institution employee OR the signing party to enter additional information using text fields, checkboxes, drop down menus, or even radio buttons after the document is in eSign.

Template Manager

Template Manager is the tool used to **define** document templates. It is accessed from within the Document Maintenance page (or Documents (RTS)) of eSign Administration

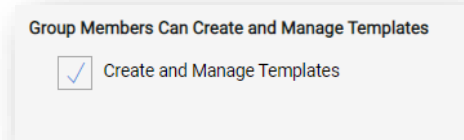
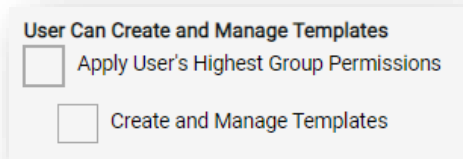


The Document Maintenance page, which will be covered completely in the next two lessons, is not only for designing templates, but is also used to define attachments (Lesson 4), import templates that may have been made previously and saved as a backup or shared by your IMM specialist, export templates for backup or to share with IMM or another financial institution, and also a place to manage template and attachment details and document specific indexes – discussed below.

Who uses Template Manager

We learned in previous lessons that permissions for users are set in the Group Maintenance and User Maintenance areas of Administration: access to Template Manager is no exception.

The Administrator and DocumentAdmins default groups have the Manage Templates permission set by default. For newly created user groups, the Create and Manage Templates permission can be granted at the group level and will give users access to Document Maintenance and Template Manager.



Alternatively, this permission can be given to a user who would not otherwise have access to it in the User permissions.

NOTE: A user who has access to the template manager will also be able to create new templates from the Document Designer during a session. Document Designer is a tool that users can employ in a session to make necessary changes to documents being processed. These functionalities will be covered more fully in Stage 5 – User Preparedness.

Template vs. Attachment

Understanding the difference between a template (or more accurately a templated document) and an attachment can sometimes be confusing.

Templates

Documents that are **printed** to eSign using the **virtual printer** or sent to eSign using an embedded function (a button perhaps) from a business system are “recognized” and processed: extract indexes and party information, place signature fields, apply fillable data fields.

This describes **templated** documents which must have a corresponding template set up for them.

Attachments

Any other document (or image) that can be included in the session is going an Attachment. Attachments *don't provide any automation*. The user selects Attachment Type and indexing information from convenient drop down menus when adding these files to a session.

Creating attachment types will be covered in Lesson 4 in this Stage. And in Stage 5 (User Preparedness) you will again see how users add attachments to sessions (if you want to see a quick example you can revisit Lesson 4 (End to end Demonstration) in Stage 1 (it's right around minute 1:30).

Attachments are a subset of documents that are used in certain process scenarios.

Indexes

Indexes are values used to identify and name archived PDF documents, and search for sessions in eSign. Currently, eSign supports a maximum of twenty user defined indexes (though this number is soon to expand).

Index Types are created on the Index Fields Maintenance page which we learned all about in Lesson 3 in Stage3. There are multiple configuration options associated with indexes.

Also, in Stage 3 we learned about Indexes as they pertain to the Imaging Systems Settings page and how they are used in the creation of the Archive files necessary to send your documents to your imaging system.

In much the same way that imaging settings can be set up globally across all documents in your system, they can be set at a more targeted level on the Document Maintenance page using Document Level Indexing which will be address in Lesson 5 of this Stage.

In the General Settings there is an option that enables the auto-population of index values on all documents in a session. If the Auto-fill indexes on Session Details option is selected on the Archive tab of General Settings, any documents in a session without a value for a given Index Type will have that value populated automatically from the first document in the session with a value. Alternatively, users may perform this Fill function manually using a button on the Session Details screen. This capability can reduce the number of index values that must be extracted from all documents.

Auto-fill indexes on Session
Details :



Recommended Activities

Review your Implementation Workbook, specifically the Document tab, with your team and see if there are any updates that should be made.

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

Lessons 2 and 3: Creating Templates

Overview

The goal of Lesson 2 is to **introduce** the learner to the process of creating a template and demonstrate just how easy it is. Then in Lesson 3 we explore the multitude of options, functions, and nuances that make up template design. The lesson 3 video is a bit longer than most as it covers all the components of template design and talks about options that were not covered, or at least not fully covered, in the demo in Lesson 2. The learner should be prepared to watch the Lesson 3 video more than once.

The **eSign document administrators** for your institution **must** pay particular attention to the lessons in Stage 4. However, we also recommend that all members of the project team watch the videos so that everyone knows what is possible, and how templates are managed.

The key element of lessons 2 and 3 are:

- Refresher on Source Documents
- View how a standard template is created including: designating Document Type, defining Indexes, designating Signing Parties and Signature Locations, and adding a Data field
- Acquire the foundation on which to learn the details of template design
- Learn how to define Document Types and examine various considerations
- Learn how to define Indexes and examine various considerations
- Learn how to identify signing Parties
- Learn how to apply signature and initial fields to a template and how to assign them to parties.
- Learn how to add data entry fields to templates and understand how the types are different
- Learn how to align and adjust fields added to a template

After watching the videos, you should:

- Use the information presented on the elements of a template, how they are applied to a sample document, and what some options are and perform the activities below
- Be prepared to discuss the creation of templates with your IMM Solution Specialist

Activity Checklist

- Watch the Lesson 2 and 3 videos
- Use your Implementation Workbook to record the details of all the templated documents you will create in your solution
- With your newfound knowledge, identify at least four (4) document types from your Implementation Workbook and define templates for them in your eSign solution
- Record any questions your team has for discussion with your IMM Solution Specialist

Source Documents

Source documents are those documents that you generate as part of your business process that need to be signed or reviewed by your consumer.

They may originate from a business system, or simply be a document you maintain on your network. Sometimes they are forms that your institution has created, or a standard form that you use as part of your business process.

Because the eSign “Virtual Printer” can be used in place of any windows installed printer, documents can be sent from business systems or from any windows application to eSign. This means that for a single session, documents can come from multiple business systems, or from the employee’s desktop, or even a network storage location.

In some cases, IMM has worked with a business system vendor to create an integration, sometimes referred to as an API. When that is the case, there will be a special option or button in the business system that will be used to *push* the documents to eSign. And, when that is the case, it may be that some, or all, of the “template instructions” are sent along with the document – negating the need for some or sometimes all of the template setup. We’ll cover some of these situations in the last lesson in this stage. In these lessons we will proceed as though you’ll be creating templates using the eSign printer with no extra bells and whistles.

No matter where your documents originate it is important for the success of your template functioning that you generate the source document that you’ll use for template creation the **same way** your users will when they are working with eSign. That said, if **they’ll** use the eSign printer from within the business application, **you** should do that, or if they’ll save a PDF to their desktop and then use the eSign printer from within Adobe you should do that. If you’re unsure, reach out to your IMM Solution Specialist for guidance.

Template Creation Demonstration

In the demonstration of how to create a template in the Lesson 2 video, we use a standard signature card. It is likely that during your **installation activity**, your installer already created a signature card template for you – that is the one that is most frequently used for initial installation and testing.

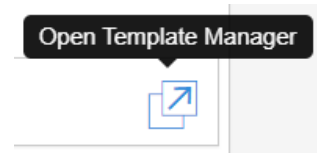
It may be, however, that even if you already have a templated signature card, that you may need to go back and make some changes to it, and once you’ve completed Lessons 2 and 3 you’ll know how to do that. The demonstration is intended to show you how easy it can be to create a template and show you the principal elements you will use.

Sometimes the most time-consuming part of templating is creating the source documents that you’ll use. Once you have those ready and print them to eSign you’ll

- Designate the Document Type
- Define the Indexes
- Designate Parties and Signature Locations
- Perhaps add Data fields
- Test

Template Manager

When we upload a document to eSign that does not have a corresponding template, and we have the permissions to create templates, we'll see the Open Template Manager button next to the Unknown Document. If you don't see the icon, but expect to, click on the Refresh button in eSign.






The document will open in the template manager and the button header will display with only the first icon active (it'll be blue, and the rest will be greyed out – except the zoom buttons, those are always active).



This visual lets us know that the first step is ALWAYS to select text to use for the new document template identification.

The button header of the template creation window has subsections:

The first three items are, generally, the first things you'll want to do with most templates:

- Designate the Document Type 
- Define the Indexes 
- Designate Parties 

All three involve **Extracting** information from the document. In the video in Lesson 2 you will see the mechanism that is used to draw a box around the text that will be used for these items.

The next five items are used to place items on the template.



The main ones of these are in the 5th position (signature field) and the 6th position (initials field). The first four are used to add data capture fields of the type text field, check box, drop down, and radio buttons respectively.

The next set is comprised of the elements that can be used to align any of those 6 fields you may have added.



The alignments are left, right, vertically (based on the field centers), align top (in the same row across aligned along the top edge of one field), horizontally (based on the field middles—if the field heights are different), align bottom (in the same row across aligned along the bottom edge of one field), match width, and match height. To use these, you first select the “anchor” field on your template (the one you're matching or aligning to) and then while holding the CTRL key down, select the other fields you want to match or align. Then click the alignment button.

The next set of buttons are the zoom in and zoom out buttons and the snap lines option.



Zooming in on values you want to extract prior to drawing boxes is highly recommended and very useful.

Snap lines generate guide lines that may help when placing fields on the template based on the locations of other fields.

The last buttons are the upload document and download document buttons.



The download document button simply downloads the PDF you're using for this template onto your workstation. The upload document button lets you replace the existing sample document with another one. This might be useful if you have a newer version of the document that you'd like to use to edit the template.

Defining Document Type/Name

The first step in the template creation process will always be to define the document using a value found on the sample document.

When we use the three extraction tools (Define Document, Indexes, and Parties) we rely on **text** present on the document that eSign will **read** in the location where we place the box or coordinates. In the Lesson 2 video demo you see that once you click the Define Document button, the cursor changes into a little cross or plus sign, and you use that to drag and create a colored box around the field to extract, like we see here.



When the cursor button is released the user is presented with a Define Document dialogue box. like this. You must make sure that the text in the box that was drawn on the document is the same as the text in the **Selection Text** box. If it's not, give it another try, be sure not to select anything extraneous around the field.

If you see nothing, or garbage characters under **Selection Text**, that generally means this is an image based document. It is always best practice to utilize text-based PDFs for source documents – but that may be out of your control. If that is the case, the Perform OCR option is available.

Define Document

Selection Text:
ACCOUNT AGREEMENT

Perform OCR (Only for Image-Based Documents)

Short Name* +
Enter Short Name

Full Name*
MULTI_PURPOSE_SIGNATURE_CARD

Description:
Enter Description

Display While Processing Archive Document Dynamic Document

Review by Non Signing Parties:
Review Only by Parties on this Document

Cancel Save

When you click the Perform OCR box (and after a moment) the selected text should appear. It is important to know that OCR is not a perfect technology, and it is sensitive to things like fonts, stray marks, or lines or boxes present on the document. When using a document that requires OCR, you'll want to be extremely careful when drawing the box around the fields you're capturing and be sure to do extra testing.

NOTE: ONLY use OCR when generating text-based PDFs is not possible.

The remaining fields in the Define Document dialogue are:

Short Name an "internal" database name (can contain alphanumeric characters and dashes and underscores, but NO BLANKS)

Full Name will appear in the lists that users will see as well as in the eSign audit file (can contain alphanumeric characters and dashes and underscores, but NO BLANKS)

Description will appear under the Full Name on the Session Details screen. This field can contain any characters as well as blanks and can be more descriptive.

Keep in mind that the Full Name will be the value used when indexing the document. So, if you can, and it makes sense, you might want to use the same document name that you use in your imaging system. It's not a requirement, and we saw in the imaging lesson how to get around this, but it's worth considering.

As a rule of thumb also, using a prefix on the Short Name that includes the source document system (such as NAC for New Account Console). This can be helpful as well.

The next 4 options are often left as the defaults as we see here, but briefly,

Display While Processing controls whether the document display option is active **by default** – almost always this is the case.

Archive Document is here to determine whether this document is archived by default – currently, if the document in the session based on this template is signed or reviewed, it will be part of the archive regardless of this setting.

Dynamic Document indicates to eSign that this document has fields that may move on the page depending on certain scenarios, such as, number of signers. Because dynamic documents require IMM to make custom additions to the template, Party information, signature fields, signature date fields and initial fields cannot be defined in them. However, you can still create the template and index extractions as well as adding data fields if you like. ***When you need to utilize dynamic documents, your implementation consultant will further assist you.***

Review by Non Signing Parties. These options pertain only to documents that do not require signatures/initials from all parties in a session:

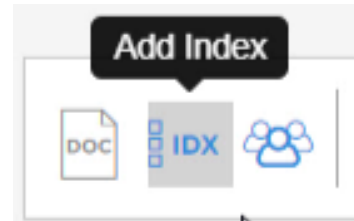
Review Only by Parties on this Document limits review to parties on this document and so non-signing parties in the session will not view the document during the signing process. This is the default.


Review by All Parties in the Session allows non-signing parties in the session to review the document during the signing process.

Defining Index Extraction

Indexes play a major role not only in the processing, categorization, and retrieval of documents and sessions while they are in eSign, but also in the archiving of documents to your imaging system.

In Stage 3 you learned how to create new index types that can then be used when templating documents.



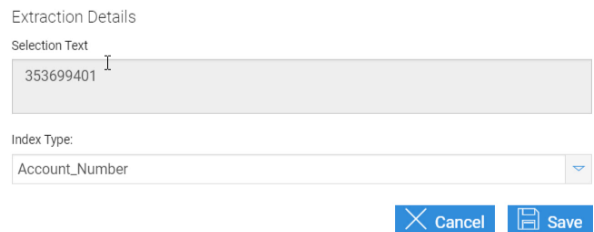
In Template Manager we use the Add Index tool  to designate the location on a document where the index value will be found and extracted. If you have a value on a document that you want to extract but don't have that index type set up yet, you'll need to set that index type up first.

NOTE: It is **not** necessary to always extract index fields from every document. Documents in a session can “inherit” index values from other documents. So long as the indexes are extracted from **one** document that will be reliably in a session you can potentially leave them off of other documents. Consider your business processes and document sets when making this type of decision.

The process of adding an index is very simple. Click the Add Index button in the menu. You will see the cursor change to the plus or cross icon. Draw a box around the value to extract. It is good practice to draw the box a bit larger and *certainly longer* than the value on the sample document, especially with names, email addresses and the like, that could be longer than the sample value.



After releasing the mouse button, the Extraction Details dialogue will appear. Verify that the extraction value is correct by comparing it with the Selection Text – if this is an image-based document, as indicated when setting up the Document definition previously, the OCR'd value will appear here and it's very important that your extraction box is as accurate as possible—that's where using the ZOOM can come in quite handy.




After verifying the Selection Text, choose the index type from the drop-down menu, and then click Save.

Defining Parties

In most cases, the names of the parties that will be signing a document will be **on** the document and available for identification and extraction, and when they are, it is very straightforward for eSign to know not only who should sign, but also which signature and initial fields to place on the document.



In practice, however, sometimes the name or names of the signing parties may **NOT** appear on the document. When possible, if the names do not appear, IMM recommends that you alter your source documents to include the signing parties' names. When that is **not** possible, there are methods that your employees will use to assign parties to signature locations in the eSign session. Your IMM Solution Consultant will assist you in the creation of templates when that is the case, and the methods your employees will use will be covered in a lesson in Stage 5.

To extract a party name, select the Add Party Info button. 

With the cursor in the plus sign configuration, click and draw a box around the signing party name, leaving extra space for longer names.

Upon releasing the mouse button, the Extraction Details box appears. Validate the



Selection Text and then select a party number from the second option—**Who does this information belong to?** You can assign up to 20 parties in a single template.

In **Select the type of extraction** select Full Name (most common) or First name or Last Name.

Adding additional Party Data

IMPORTANT: When extracting party information, the first time you select a given party number, in this case, Party 1, the options for the type of extraction are for the name (Full, First, Last). If you select the same Party number a *second* time after drawing another **Party Info** extraction box, you'll see a new set of extraction types: Home Email, Work Email, Home Phone, and Phone Country Code. The email and phone values can be particularly time saving if you are utilizing remote signing. When you can capture these values from at least one of the documents in the session, you will not have to type them in manually when setting up the remote signature session later. This, again, might be a time when updating one of your source documents could be in order if you don't normally have those values available.

Data Entry Elements

The next set of buttons in the menu are the data entry elements, tools that are used to place items **on** the template rather than extract from them.

The most frequently used of these are in the 5th position, the signature field, and the 6th position, the initials field.



With all the data entry elements, to add them you will click on the icon in the menu and drag the element onto the template. Don't worry about dragging it to the exact spot right away, you'll be able to move it around after you've configured it.

Signature Field

To add a signature field location to a template, use the Signature icon in the toolbar. Click, drag, and release the mouse button and you'll see the **Field Details** dialogue box. For a Signature that dialogue will look like this:



Field Details

Field Name:
TEAWEB_SIG_P1_1

Role/Type:
Party 1

Required

Provide Signature Date

Cancel Save

Field Name will be a default. The value can be translated as follows: TEAWEB is a product way of referring to eSign (it's legacy), SIG means this is a Signature field, P1 stands for Party 1 and the trailing "1" indicates that this is the first signature field for **this** party on **this** document (you can place more than one signature line on the same document for the same party.)

Role/Party is where you assign the Party to the field. The default will be the NEXT party number, but if you want to assign it to an already assigned party, simply change that here, and the Field Name will update accordingly.

Required indicates to eSign whether a signature is required for this signature line. If so, a signer in the session will have to click on this field to sign.

Provide Signature Date will add the date stamp to the signature when the signer clicks on the sign prompt. When selecting the date, you can also choose the font type, size, and alignment.

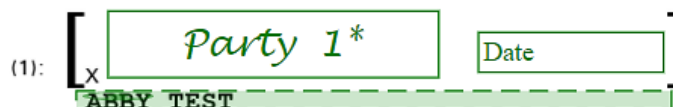
Provide Signature Date

Font:
ArialMT 10

Cancel Save

Once you click **Save**, the Signature field, and optionally the date field, will display on the template document. You can click on the fields and move them around to

where you would like them located. **NOTE:** if you'll be adding other fields sometimes it's easier to just add all the fields and then move them around afterwards.



Initials Field

Adding the initial field is even easier. Once you click, drag, and release the mouse button from the INT field, you'll see the **Field Details** dialogue box.

A dialog box titled 'Field Details' with the following fields: 'Field Name' containing 'TEAWEB_INI_P1_1', 'Role/Type' set to 'Party 1', and a checked 'Required' checkbox. 'Cancel' and 'Save' buttons are at the bottom right.

Field Name is similarly structured but indicates “INI” for Initial field.

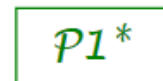
Role/Type is once again the Party and there can be multiple initial fields for a single Party.

Required is used to make clicking on the Initial field in the signing session mandatory.

There is no date field associated with initial fields.

Once you click **Save**, the Initial field, will display on the template document. You can click on the field and move it around to where you would like it located.

NOTE: if you'll be adding other fields sometimes it's easier to just add all the fields and then move them around afterwards.



Data Entry Fields

Now let's learn about the Data ENTRY fields, the first four items in the Data Entry group of the template menu. These are here to add data entry elements to the template that you either want your employee to fill in, or have one of the signing parties fill in. In our demo we did a simple example of an email address, but these could really be anything.

Data Entry – Text Field

The first of the Data Entry fields is a text field where you might want the employee or signer to type in some value.



This field is a little different from the other three because it can also be used to capture an INDEX value if needed. For example, if TAX ID number doesn't appear on a certain document that might be part of a session that wouldn't have another document with the TAX ID number, you can add a field to capture it. You will add a field, associate it to the TAX ID Index type, and set it to have the employee enter it. Important to note is that data entry fields will only pass data to the Index if entered in an on premise signing session. Values entered via remote signing will be on the document, but will not be captured as indexes.

Once you click and drag the text box field onto the document, you'll see a Field Details window with several options:

Field Details

Field Name:
TEXTFIELD_2

Index Field

Tool Tip:
Enter Tool Tip

Unlock Options:

- Employee can edit field until at least one party signed/reviewed session
- Employee can edit field irrespective of signing status
- Employee can edit field until below party signs session
- Employee and selected party can edit until below party signs session

Choose Party

Default Value:
Enter a value

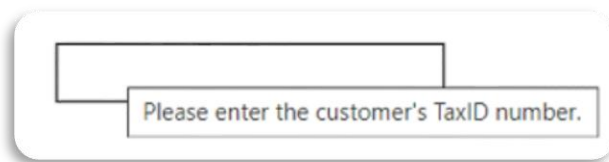
Font:
ArialMT 10

Cancel Save

Field Name The default value will simply be TEXTFIELD with a number. It is recommended that you change this to a more descriptive value. One standard is to use a prefix for the template type, an underscore, and a descriptor. E.g., SIGCARD_EMAIL if this is an email address on a Signature Card.

Index Field Checking this option will change the Field Name box to a drop down with a list of the currently unused Index Field names.

Tool Tip Text entered here will pop-up for the user when they hover over the field. It is often useful to include allowable characters or formatting information. (E.g., "please enter Tax ID as only digits with no spaces or dashes")



Unlock Options These determine **who** can enter data in the field and at what point during the signing process:

- **Employee can edit field until at least one party signed/reviewed session** – once at least one signer has finished the session the field is then locked.

- **Employee can edit field irrespective of signing status** – the employee can go into the session at any time and enter the field, but not after the session is completed.
- **Employee can edit field until below party signs session** -- once the selected party has signed the session, the field is locked. When this option is chosen, the **Choose Party** drop down activates and you must choose a party.
- **Employee and selected party can edit until below party signs session** – this is the only option that allows the signer to enter the information. Again, the **Choose Party** drop down activates and you must choose a party. You can also choose whether a value is REQUIRED by selecting **Party Must Enter Value**.

Choose Party

Choose a Party from the Dropdown.

Employee and selected party can edit until below party signs session

Party 1 Party Must Enter Value

Default Value will pre-populate the field with some value – this is often left blank.

Font Use these options to control the font type, size, and alignment in the field.

When you click Save, you'll see your text field, and like with all the fields you can resize and reposition it as needed.

Data Entry – Check Box

The next Data Entry field is a check box field.



Once you click and drag the check box onto the document, you'll see a very similar Field Details to the text field window with a few important differences.

Field Details

Field Name:

Tool Tip:

Unlock Options:

- Employee can edit field until at least one party signed/reviewed session
- Employee can edit field irrespective of signing status
- Employee can edit field until below party signs session
- Employee and selected party can edit until below party signs session

▾

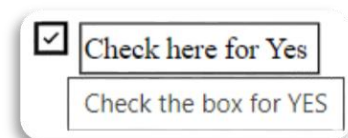
Default Value:
 ▾

Caption:

Font:
 ▾ ▾ ≡ ≡ ≡

Field Name The default value will simply be CHECKBOX with a number. It is recommended that you change this to a more descriptive value. One standard is to use a prefix for the template type, an underscore, and a descriptor. E.g., SIGCARD_CB_OPTIN if this is an opt-in field on a Signature Card.

Tool Tip Text entered here will pop-up for the user when they hover over the field. It is often useful to include a brief explanation of what is being asked.



Unlock Options are the same as with the text field (above), with the exception that you cannot make the entry of the field required with the 4th option.

Default Value Either checked or unchecked.

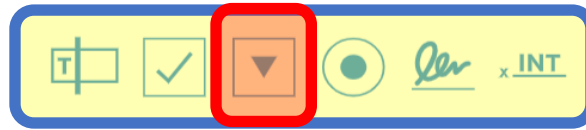
Caption Allows you to add a caption that will display to the right of the checkbox. This is the default placement, but you can move it around as needed.

Font Use these options to control the font type, size, and alignment in the field.

When you click Save you will see your checkbox and caption text (if you entered any) and you can move those elements around on the template.

Data Entry – Dropdown List

The next Data Entry field is a dropdown. Dropdowns are useful when you have a selection of options and only want the user to select one. Dropdowns are a great way to standardize data.



Once you click and drag the dropdown option onto the document, you'll see a very similar Field Details to those above with a few important differences.

Field Details

Field Name:

Tool Tip:

Unlock Options:

- Employee can edit field until at least one party signed/reviewed session
- Employee can edit field irrespective of signing status
- Employee can edit field until below party signs session
- Employee and selected party can edit until below party signs session

Party Must Enter Value

Dropdown values: Enter one per row

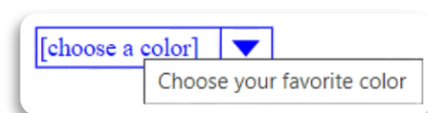
Red
Orange
Yellow
Green
...

Default Value:

Font:

Field Name The default value will simply be DROPDOWN with a number. It is recommended that you change this to a more descriptive value. One standard is to use a prefix for the template type, an underscore, and a descriptor. E.g., CARDAPP_DDOWN_COLOR if this is a selection field asking for a color choice on a credit card application.

Tool Tip Text entered here will pop-up for the user when they hover over the field. It is often useful to include a brief explanation of what is being asked



Unlock Options are the same as with the text field (above).

Dropdown values. Enter one per row The values for the list should be typed directly into the box and not copied and pasted in. (Sometimes copying and pasting from an external source can include unwanted embedded characters.) Since you must use one of the values as the “default,” it is a good practice to have the first item describe what is being requested.

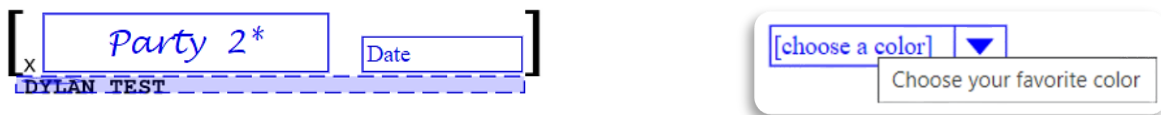
Default value Use one of the values from the list as the default value. Sometimes people use a value like [select from list] rather than one of the actual values.

Font Use these options to control the font type, size, and alignment in the field

When you click Save you will see your dropdown on the template and you can move and resize it as needed.

Associating a Party to a Data Entry field

In the above example for a dropdown the field has been associated to one of the parties using the **Employee and selected party can edit until below party signs session** option. Since that party is indicated in blue on the template, the field will also be shown in blue and not black like the first two.



This coloring helps you to see the associations in your templates. The signers will not see the coloring.

Data Entry – Radio Buttons

The last data entry option is the radio button. Radio buttons are useful when you have a selection of options and only want the user to select one.



They are different in display from drop downs which is sometimes useful. Radio buttons also offer the opportunity to have NO selection, which is not an option with dropdowns.

Once you click and drag the radio button option onto the document, you'll see a very similar Field Details to those above with a few important differences.

Field Name The default value will simply be RADIOGROUP with a number. It is recommended that you change this to a more descriptive value. One standard is to use a prefix for the template type, an underscore, and a descriptor. E.g., SIGCARD_RG_ACCTTYPE if this is a radio group to indicate the type of account on a signature card.

How Many Options Determines how many options there will be

Option Shape Can be either a circle or a square

Layout Can be either vertical or horizontal (though once on the template all of the fields can be moved/resized)

Options For each option you will enter a value (**Enter Label**), and a tool tip (**Enter Tool Tip**), if desired

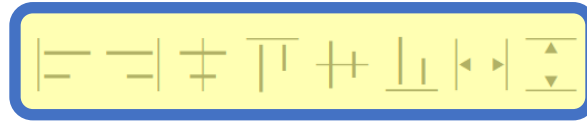
Default Option You can select a default option or not.

Unlock Options are the same as with the text field (above).

Font Use these options to control the font type, size, and alignment in the field

When you click Save you will see your radio button group on the template and you can move and resize the elements as needed.

Aligning Fields



The elements that can be used to align any of the fields added to a template include the following:

- align left
- align right
- align vertically (based on the field centers)
- align top (so in the same row across aligned along the top edge of one field)
- align horizontally (based on the field middles—if the field heights are different)
- align bottom (again, same row across but based on bottom edge of one field)
- match width
- match height


It's a great idea to try these out and get a sense for how they work.

The methodology used to align fields using these tools is to **first** select an **anchor** field (the one you're matching or aligning to) and then while holding the CTRL key down, select the other fields you want to match or align. Then click on the alignment method button.

The video for this lesson walks through examples of this and is really the best way (other than just trying it out) to see how they work.

If you need to resize a field, simply click on the field, then click on a corner and drag the handles to make it the desired size.

Template Summary

On the left of the templating window there is a summary panel. Each of the elements added for extraction or entry display here and each has an edit button  that can be used to display the Field Details window for the field.

Panel of Information

- Full Name
- Indexes
- Data Fields
- Signature Fields
- Party Information

Any fields that are linked to a party will be the same color shown for the party.

Remember that template management is not a one and done activity. It is an ongoing maintenance requirement as documents change, new documents are added, and business processes are adjusted. So, it's a good idea to have two or a few people on your team who are comfortable working with templates.

Like with so many administrative functions, it's a good idea to only edit existing templates when you know no one will be using it. And importantly, changes made to templates will only affect **incoming** documents going forward, they will not reflect adjustments to documents already collected or in a session.

Documenting Your Templates

One more reminder before you dive in with both feet.

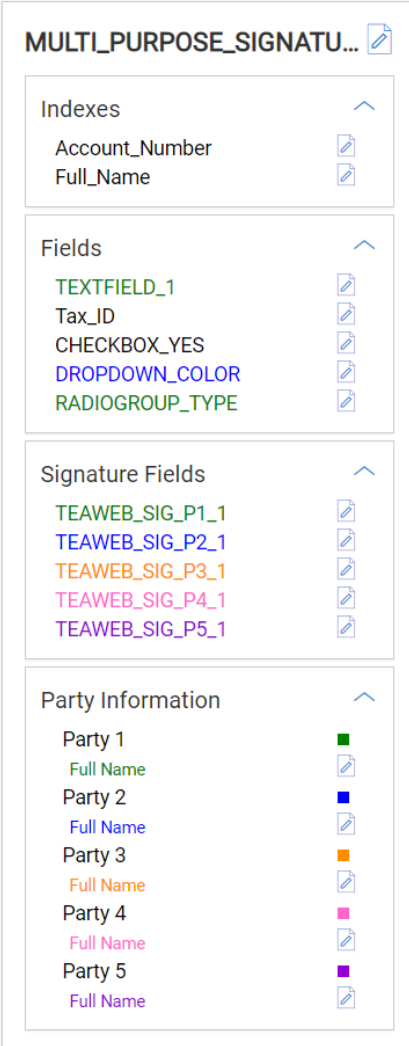
Don't forget that at IMM we highly recommend and support starting with a single business process and a single business system at a time, particularly for the first implementation. That way you're able to target the learning process while keeping it as straightforward as possible.

Structure and planning being the keys to success, you should prepare the following elements before starting:

Identify the business system and process you'll start with.

Identify the source documents that are part of that process and where they originate (are they all generated in your business system? Or do some reside in a shared network folder or on individual workstations?)

Create samples of those source documents using the originating system. This will be good practice for preparing for testing.



The screenshot shows a summary panel for a template named "MULTI_PURPOSE_SIGNATU...". It is divided into four sections, each with an expand/collapse arrow:

- Indexes:** Contains "Account_Number" and "Full_Name", both with edit icons.
- Fields:** Contains "TEXTFIELD_1" (green), "Tax_ID" (blue), "CHECKBOX_YES" (blue), "DROPDOWN_COLOR" (blue), and "RADIOGROUP_TYPE" (green), each with an edit icon.
- Signature Fields:** Contains "TEAWEB_SIG_P1_1" (green), "TEAWEB_SIG_P2_1" (blue), "TEAWEB_SIG_P3_1" (orange), "TEAWEB_SIG_P4_1" (pink), and "TEAWEB_SIG_P5_1" (purple), each with an edit icon.
- Party Information:** Lists "Party 1" through "Party 5" with colored squares and "Full Name" labels with edit icons. The colors correspond to the signature fields: Party 1 (green), Party 2 (blue), Party 3 (orange), Party 4 (pink), and Party 5 (purple).

When doing this, be sure to use test data and test accounts. You don't want to have actual customer data on documents that you might want to share outside of the institution or use to test, demonstrate, or document the solution.

Be sure to fill all relevant fields on your sample documents including all signature parties.

Then, use your implementation workbook and record the document names (what you call them, how they're identified in their source systems) and indexes (the values you're going to capture like names, dates, numbers, etc.)

And identify the corresponding identifiers in the imaging system into which they'll be archived (for example, maybe in your Loan Origination System you call the Loan Application "Client Loan App" but maybe in your imaging system you call it LOS-Application)

The more fully you document this information at this time, the smoother creating templates and maintaining them will be.

Recommended Activities

Review your Implementation Workbook, specifically the Document tab, with your team and see if there are any updates that should be made.

Apply your knowledge of all the elements of a template, how they are applied to a template, and what all the options are and how you might use them in your processes. Identify at least four (4) document types from your Implementation Workbook and define templates for them in your eSign solution.

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

Lesson 4: Attachments

Overview

The goal of Lesson 4 is a focus on Attachments, when they are used, how they are different from templated documents, and how to set them up.

The **eSign document administrators** for your institution **must** pay particular attention to the lessons in Stage 4. However, we also recommend that all members of the project team watch the videos so that everyone knows what is possible, and how templates are managed.

The key elements of lesson 4 are:

- Understand what types of documents will be and can be attachments
- Explore the use cases for adding attachments in branch
- Learn how to create an attachment type
- Explore the use cases for utilizing remote attachments and understand how to set them up

After watching the videos, you should:

- Apply your knowledge of all the elements of an attachment type and how they are used for both in branch and remote sign attachments.
- Be prepared to discuss the creation of templates with your IMM Solution Specialist

Activity Checklist

- Watch the Lesson 4 video
- Use your Implementation Workbook to record the details of attachments you will create in your solution
- With your newfound knowledge, identify at least one (1) attachment type from your document list in your Implementation Workbook and set it up in your eSign solution
- Record any questions your team has for discussion with your IMM Solution Specialist

Attachments

An attachment is essentially any document (or image) **other** than those you are templating that you might want to include in the session. This could include proofs of ID, customer photo, informational materials, titles, proof of insurance, and much more.

In large part, documents that do not need to be signed or initialed often fall into this category – though as we will see in a lesson in Stage 5, it is possible to require review, initialing, or signing on attachments during processing.

Attachments are **not automated** in the way templates are, and therefore when they are being added to a session the user must select information from convenient drop-down menus.

The file types that eSign accepts when a user is uploading an attachment are PDF, JPEG, GIF, BMP, PNG, and TIF.

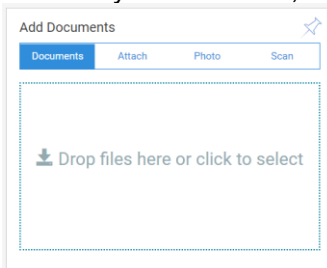
When attachments are used

Attachment types are used during an active session. Importantly, there must be at least one templated document before the user can add an attachment.

The employee may need to add documents that are already electronic – they might be located on their workstation or network location, or they may have received them via email.

Alternatively, the signer may be providing documents in hardcopy, in which case they can be scanned in, either directly into eSign or scanned to a file and then attached. And finally, the employee can use a webcam to capture a photo if desired.

When on the Collected Documents page, the user will see the Add Documents panel on the left side of the screen. If the user is already in a session, they will see an Add Docs button which,



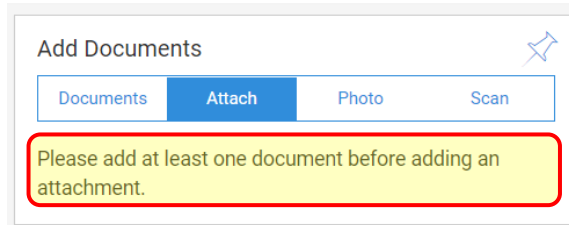
when pressed, will bring them to a screen with the same Add Documents panel.

There are four options presented to the user, and sometimes this can be a little confusing. The options are Documents, Attach, Photo, and Scan.

In this case, the **Documents** option means **TEMPLATED Documents**. So, if you want to add a templated document either to an existing session or to create a new session, you can drag the file here, or click here to browse your workstation or network.

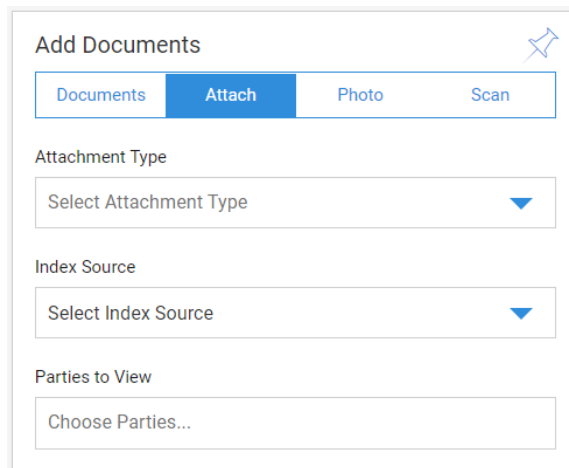
The other **THREE** options: Attach, Photo, and Scan all refer to **Attachments**, and specifically **NOT** Templated documents.

When the user selects Attach and there are no templated documents yet, they will see this message letting them know that there must be at least one **templated** document in the session before Attachments can be added.



The screenshot shows a dialog box titled "Add Documents" with a close button in the top right corner. Below the title is a horizontal menu with four tabs: "Documents", "Attach", "Photo", and "Scan". The "Attach" tab is currently selected and highlighted in blue. Below the menu is a yellow rectangular message box with a red border containing the text: "Please add at least one document before adding an attachment."

Once there is at least one templated document (or if adding an attachment from within an active session), the user sees this:



The screenshot shows the "Add Documents" dialog box with the "Attach" tab selected. Below the menu, there are three sections, each with a dropdown menu: "Attachment Type" with the text "Select Attachment Type", "Index Source" with the text "Select Index Source", and "Parties to View" with the text "Choose Parties...".

Attachment Type Unlike with Templated documents, the user must select an attachment type from an available list. We will see how to create those below.

Index Source Since there is no automatic index extraction on Attachments, one of the Templated documents will be used to supply indexes to the Attachment and that document is selected here.

Parties to View Determines which signing party or parties will be able to view this attachment during the signing ceremony. The user may select more than one.

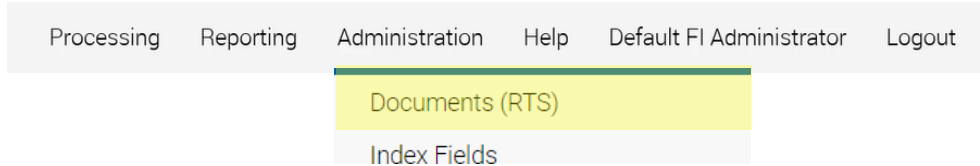
The use of these fields will be covered in more detail in the lessons in Stage 5: User Preparedness.

There are cases when the signer themselves may need to add an attachment. This won't be the case with an in-branch signer, but certainly with remote signers, your process may dictate that they upload a copy of their ID, or an image of their proof of insurance, or other relevant document.

When this is the case we must enable those attachment types for remote use, and we will see how to do that later in this lesson.

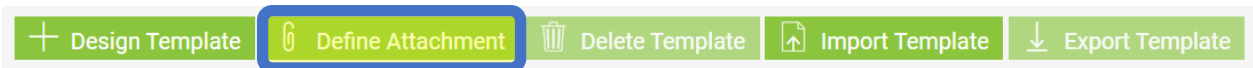
Setting up Attachment Types

Attachment Types are set up in the same Documents (RTS) area of eSign Administration as Templates.



Remember that the Document Maintenance page is where Templates are managed, but it is also where we define Attachment Types.

When on the Document Maintenance page, you'll notice this button bar which includes a Define Attachment button.



Clicking it opens the Define Attachment dialogue.

Define Attachment

Full Name: Proof_of_Insurance

Short Name: Proof_Insurance

Description: Proof of Insurance

Archive: Yes

Vendor: None

Save Cancel Close

Full Name will appear in the lists that users will see as well as in the eSign audit file (can contain alphanumeric characters and dashes and underscores, but NO BLANKS)

Short Name an “internal” database name (can contain alphanumeric characters and dashes and underscores, but NO BLANKS)

Description will appear under the Full Name on the Session Details screen and when adding the Attachment Type to a Remote session. This field can contain any characters as well as blanks and can be more descriptive.


Archive This Yes or No option determines whether documents of this attachment type will be included in the archived documents from the sessions. It may be that something like an ID or

proof of insurance SHOULD be archived, whereas a standard informational sheet or terms and conditions should NOT. You can set that here


Vendor This field will rarely come into play but where applicable reflects the name of the Vendor supplying this type of attachment.

Once all fields are filled in, click SAVE.

The new attachment type will appear in the list of Documents on the Document Maintenance screen and it will have a small paperclip icon next to the Full Name indicating that it is an attachment type.



<input type="checkbox"/>		Proof_of_Insurance Proof of Insurance
--------------------------	---	--

To display a list of Attachment Types on the Document Maintenance screen, select “Attachment” in the Document Type drop down in the search panel and click search.
















Search 

Document Type

Document Name

 Search  Clear

The result list will look something like this:

Total Documents : 4		Selected : 0		 Export
 Design Template	 Define Attachment	 Delete Template	 Import Template	 Export Template
<input type="button" value="Select All"/>		 Sort By		
<input type="checkbox"/>	 Proof_of_Insurance Proof of Insurance	Proof_Insurance		
<input type="checkbox"/>	 Birth_Certificate Birth Certificate	BirthCert		
<input type="checkbox"/>	 Identification Signer Identification	Identification		
<input type="checkbox"/>	 Miscellaneous Miscellaneous Attachment	MISC		

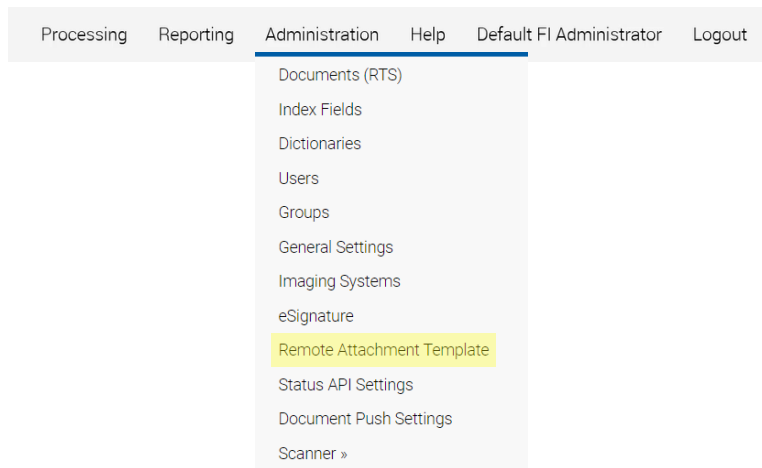
The newly created Attachment Type will now display in the Attachment Type drop down menu for the eSign users.

Remote Attachments

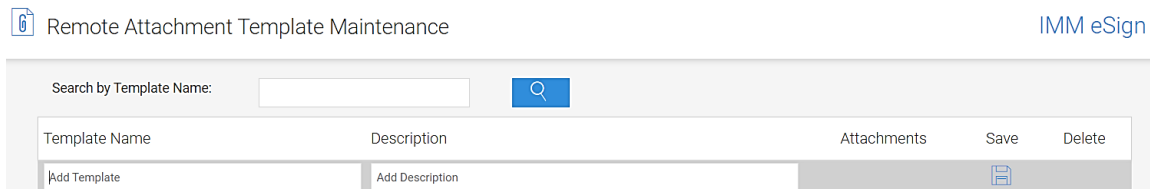
If remote signers will be required or requested to add attachments, at least one Remote Attachment Template must be created in eSign.

Prior to creating a Remote Attachment Template, at least one attachment type must be defined. The term template here should not be confused with Document templates. A Remote Attachment Template is a grouping of attachment types that can be associated with discrete business processes (Car Loan, Home Loan, New Account, etc.). When creating one of these Remote Attachment Templates we're essentially making life easier for users by giving them an option in a drop down they can choose when they want to add a remote attachment request to a remote signing party. The attachments will be electronically supplied by the applicant during the signing experience on the Adobe Sign website.

Setting these up is simple. Select Remote Attachment Template from the Administration drop down menu.



The Remote Attachment Template Maintenance page will open.

A screenshot of the 'Remote Attachment Template Maintenance' page. The page title is 'Remote Attachment Template Maintenance' and the user is logged in as 'IMM eSign'. There is a search bar for 'Search by Template Name:' with a magnifying glass icon. Below the search bar is a table with columns for 'Template Name', 'Description', 'Attachments', 'Save', and 'Delete'. The table contains two rows: 'Add Template' and 'Add Description'. The 'Add Description' row has a 'Save' icon in the 'Save' column.

Enter values into the fields:

Template Name The name that will appear in the drop-down list for the eSign user. (e.g., New Account Documents)

Description Plain text explanation of what this template might contain or be used for (e.g., Photo ID and Proof of Address)

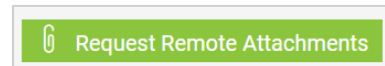
Click Save icon.

When you do, your new “template” will be at the bottom of the list of templates, and you will be able to select Attachment Types to add from the drop-down list.

Attachment Name	Description	Required	Save	Delete
Select Attachment		<input type="checkbox"/>		
Select Attachment				
Identification				
Miscellaneous				
Proof_of_Insurance				

Select an attachment type from the drop-down list, place a check mark in the Required column if this attachment type will be required for this Remote Template type, and click the Save icon. If you need to add additional attachment types, just select the next one and click save until you are done.

When users are sending a session for remote signing, they will be able to request remote attachments by clicking the Request Remote Attachments button on the eSignature Management page.



After clicking the button, the user will see a drop-down menu enabling them to select a remote attachment template. They can then apply the remote attachment template to ANY or ALL remote document signers in the session and they can add additional attachment types to, or remove attachment types from, the request, and make some or all the attachment types required.

This process will be covered in more detail in a lesson in the Stage 5: User Preparedness

Summary

Attachments are not templates but play a critical role in many business processes.

Attachment do not have automation and are *generally* not signed, but they can be, if necessary, and we'll show you how that's done in a lesson in Stage 5.

Attachments are added to a new or existing session by the institution user, or during the signing ceremony by the signer.

Depending on the attachment type and the business process, attachments can be part of the archived documents or not.

Recommended Activities

Review your Implementation Workbook, specifically the Document tab, with your team and see if there are any updates that should be made based on what you have learned about Attachments.

Identify at least one (1) attachment type from your document list in your Implementation Workbook and set it up in your eSign solution.

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

Lesson 5: Additional Items and Exceptions

Overview

The goals of Lesson 5 are to wrap up the remaining features and functions of the Document Maintenance page and to discuss implementations and integrations that fall outside of the “basic” model that has been presented in the training thus far.

Considering that there are dozens of business systems in use at the over 1500 institutions utilizing IMM/eSign it is impossible to provide custom user-based training for every situation – that is why the IMM team of experienced Solutions Consultants meet with your team members after each stage of the process to discuss your specific environment, any exceptions or unique circumstances, and particular considerations for your institution.

The key elements of lesson 5 are:

- Navigating the Document Maintenance page and editing existing templates
- Overview of document level indexes and indexing
- Discussion of internet browser considerations when virtual printing PDFs
- Introduction to business system specific considerations
- Discussion and review of imaging system specific considerations

After watching the videos, you should:

- Plan for the ongoing maintenance of document templates and attachments
- Determine the potential nuances and exceptions to template and attachment design and use that may exist in your institution’s processes
- Record any questions your team has for discussion with your IMM Solution Specialist

Activity Checklist

- Watch the Lesson 5 video
- Use your Implementation Workbook to record any remaining details of templates, attachments, and document maintenance that you have discovered
- With your newfound knowledge, return to your eSign solution and make at least a few edits to a template or two as practice
- Record any questions your team has for discussion with your IMM Solution Specialist

Document Maintenance Page

In the last few lessons, the Document Maintenance page has been a prominent player. It is there that you create, edit, and manage document templates and attachments, the focus of Lessons 2, 3, and 4.

Once template and attachment types are created, they are listed here and can be renamed, updated, deleted, and even exported. In addition, templates can be imported into a system on this screen, details of the template and attachment types can be exported, and if there are specific index needs to be set at a document level, that can happen here.

The screenshot shows the 'Document Maintenance (RTS)' interface. On the left is a search panel with fields for 'Document Type' (set to 'All Types') and 'Document Name'. The main area displays a summary: 'Total Documents : 120' and 'Selected : 0'. Below this are several green action buttons: '+ Design Template', 'Define Attachment', 'Delete Template', 'Import Template', and 'Export Template'. A 'Select All' button and a 'Sort By' dropdown are also present. The main content is a table listing document templates and attachments:

<input type="checkbox"/>	ACCOUNT_ACTIVITY_PROFILE ACCOUNT_ACTIVITY_PROFILE	NAC_ACCT_ACT_PROFILE	OCR	🗑️	🔗
<input type="checkbox"/>	ACCOUNT_INFORMATION_SHEET ACCOUNT_INFORMATION_SHEET	NAC_VMPC656_0409		🗑️	🔗
<input type="checkbox"/>	ACH_DEBIT_STOP_PAYMENT_REQUEST ACH_DEBIT_STOP_PAYMENT_REQUEST	NAC_ACH_STOP		🗑️	🔗
<input type="checkbox"/>	ACH_UNAUTHORIZED_DEBIT ACH_UNAUTHORIZED_DEBIT	NAC_ACH_AFF		🗑️	🔗
<input type="checkbox"/>	ATMNIIGHT_DEPOSIT_PRECAUTION ATMNIIGHT_DEPOSIT_PRECAUTION	NAC_UPN_ATM_LAZ		🗑️	🔗

Let's look at these functions.

Search When looking for a specific template or attachment type, use the search panel on the left to search for it. The **Document Type** drop down will limit the search to only templates ("Documents") or only attachments. The **Document Name** option will limit results to containing what is typed there—just enter part or all of the Full Name and press Enter or the Search key. If you want to see all attachments or all templates you can leave the Document Name field blank.

Total Documents shows the total number of templates and attachments currently created in your eSign system.

Selected shows the total number of items in the list that have been checked off in the box to the left of the name. This check box can be used when selecting templates to export or even delete.

The green buttons along the top provide the following functions:

+ Design Template **Design Template** – we have seen how this button is used to create a new template when not creating it directly from an Unknown Document on the Collected Documents screen. (As we know, the BEST way to create a NEW template is to generate it from the source system and choose design template from the collected documents list next to the Unknown document.)



Define Attachment – we have seen how this button is used to create a new attachment type.



Delete Template -- Delete multiple template or attachment types by placing check marks in the boxes on their rows and using this button. (Only do this with an abundance of caution!)



Import Template -- import a previously defined and exported template – keep in mind this must be either supplied by IMM or previously exported from your system.



Export Template – export one or multiple templates from your system. It's not a bad idea to export templates and save the files somewhere on your network just in case you need to recover them – a highly unlikely scenario.



Export – Generates an Excel file that contains the details of all of the template and attachment types in the list., it's a great idea to create this export after making additions to use for reference purposes. This function is handy when creating your parameters file, if you need one.



On each row there is a trash can which enables you to delete a single template or attachment type.



The designer launch icon will open the source document for a template in template designer.



If the template type has been set up to use OCR you'll see this icon.



If the item is an attachment type, you'll see a paperclip to the left of the document name.

When you click on one of the rows, the details section will open for that document type.

The screenshot shows a configuration window for a document template. At the top, there are two tabs: 'MULTI_PURPOSE_SIGNATURE_CARD' (selected) and 'SYS_SIGNATURE_CARD'. Below the tabs are three sub-tabs: 'Details' (selected), 'Index Fields', and 'Imaging Indexes'. The 'Details' tab contains the following elements:

- Full Name:** A text input field containing 'MULTI_PURPOSE_SIGNATURE_CARD'.
- Short Name:** A text input field containing 'SYS_SIGNATURE_CARD'.
- Description:** A text input field containing 'Multipurpose Signature Card'.
- Archive:** A toggle switch set to 'Yes'.
- Display Document While Processing:** A toggle switch set to 'Yes'.
- Review by Non Signing Parties:** Two radio button options:
 - Review by All Parties in the Session
 - Review Only by Parties on this Document
- Platform:** A dropdown menu with the text 'Select Platform' and a downward arrow.

At the bottom right of the window are two buttons: 'Save' and 'Cancel'.

The **Details** tab is nearly the same as the define document options displayed when initially setting up a new template—the only items missing are Perform OCR and Dynamic Document. Those settings **MUST** be set when creating a template and cannot be changed after the template is saved without using the template designer.

Full Name, Short Name, Description, Archive, Display Document While Processing, Review by Non Signing Parties, and Platform all follow the same rules as those covered in Lesson 3.

For an attachment type, Display Document While Processing and Review by Non Signing Parties are not present – and “Platform” is “Vendor”.

The **Index Fields** tab, by default, will include the IMM Standard Date, Time, and Transaction ID fields when a new document type is set up. As indexes are added to the template for extraction, they will be automatically added to this screen. It may be possible to use this tab to impact indexes specifically at the document type level: add a default value, perform a custom function, etc. Because it is unlikely you will need – or want – to do this in most applications, we will not cover that function in this training. It is there, if needed, however, and your IMM Specialist will work with you when this function is needed.

When configuring imaging system settings, (covered in Stage 3), if “Use FI Level Indexes for RTS Documents” is selected on the Imaging System settings screen, this Index Fields will disappear. The setting means use the Index configurations set on the Indexes screen across all documents in this system. The setting will not impact what indexes you can extract from documents when creating your templates and should not impact most implementations. Again, your IMM Specialist will work with you if this is needed.

The **Imaging Indexes** tab is unlikely to be used in most implementations. But, in some configurations, with some imaging systems, and with some business systems you may, and your IMM Specialist will help guide you in those.

If you look at this tab, you'll notice that it looks quite like the Imaging Systems setup screen. This tab allows you to set archiving configurations specifically at the document type level. So if there are a few document types that you want in a separate archive file, named differently, or have different line level details, you can set that up here.

Browser Considerations

IMM eSign is a browser-based solution and as such we recommended that all user workstations utilize the **same** browser. Supported browsers include:

- Google Chrome
- Microsoft Edge
- Internet Explorer 11
- Mozilla Firefox

In addition, your business system, imaging system, or other document related tools may also be browser-based. In some cases, those other systems may require a specific browser.

When printing documents from various systems using the eSign Virtual Printer, a PDF is passed into eSign for processing. Whenever possible we want that PDF to be **text-based** to ensure the fastest and most accurate processing. With the newer Chromium-based browsers (Chrome and Edge), printing PDFs results in image-based files. (This is in contrast to printing a PDF from Internet Explorer, Adobe directly, or other applications, which maintain the text-based information in the PDF if it was there to begin with.)

Even though eSign can utilize optical character recognition (OCR) and turn image-based PDFs into readable text, the OCR process isn't 100% perfect and can add noticeable processing time that may cause employee dissatisfaction.

So, if you know that you will be routinely printing PDFs from browser-based applications, whether your business system or another software, we recommend consulting with your IMM Specialist on the best way to handle this.

Also, if you are using Internet Explorer to print those PDFs today but will be changing to Chrome or Edge in the future, you may need to update your templates or your processes.

Be assured that at IMM we are working to accommodate these nuances between the browsers and have strategies in place to assist your team in the interim.

Business System Considerations

Throughout this training we have approached the IMM eSign system using the “no exceptions” or “basics” model utilizing the Virtual Print Driver. Because IMM eSign is business system independent, it is imperative that you learn and understand how it functions natively BEFORE trying to understand the nuances that arise with different business systems, business cases, user preferences, and institutional standards of practice.

In the standard, “no integration,” model with a business system, documents are processed by the eSign Printer/virtual print driver and utilize the template rules you have established using the template manager.

In the case of business systems that are utilizing some degree of integration with eSign there are different levels that need to be understood.

User Interface

One such difference involves the **action** the user takes inside the business system when they are ready to send documents to eSign. Instead of using a standard print dialogue, the business system may have a button, or option the user can select, that is programmed to send the documents to eSign. This is taking advantage of the IMM eSign API, or Application Programming Interface, which allows a 3rd party system to more tightly integrate with eSign.

Template Impacts

When using this type of integration, some business systems may simply send the PDF document as though it is being sent using the virtual printer. However, the eSign API also allows the business system to send additional information along with the document to aid in the processing on the eSign side, such as:

- document type or name
- some or all the needed index values
- party (or signer) name(s)
- signature/initial locations

Different business systems provide different levels of integration, and your IMM Project Manager or Solution Consultant will be able to tell you all the specifics you'll need to know. Depending on the system and its integration you may not need to create templates for documents from that system at all, or perhaps only need to add signature fields or index extractions.

Because of this, we **highly recommend** that before you invest a lot of time in creating and designing **more than just a few** templates, you discuss your business system with your IMM Specialist and determine if there is an integration or any other specific nuances.

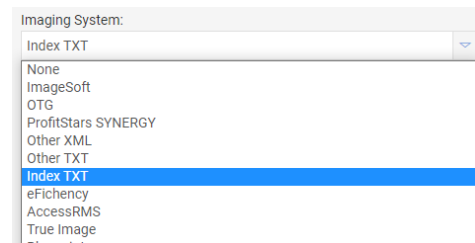
Regardless, we still recommend that you try creating a few templates as if there is no integration – the practice will ultimately help you understand the solution.

Imaging System Considerations

As we learned in Stage 3, IMM creates files that are used to transfer documents and metadata to your imaging system for import.

Like with business systems, there are numerous imaging systems and therefore a variety of methods that can be used to prepare the archive-ready files.

In this training, we learned about the Index Text method, which is extremely flexible and commonly used, but there are other options for the formatting and handling of the archive-ready files. It will be through consultation with your IMM Project Manager and Solution Consultant that you determine which method to use and how to set it up.



Most likely, you've already had that discussion and made those decisions, but in case you haven't, add that to your list of questions for your consulting engagement.

Earlier is better when it comes to setting up your archive methodology so that true end to end testing can take place including sending completed documents into your imaging system.

Lastly, it is best practice to engage your imaging system vendor, OR system administrator at your institution, sooner rather than later to ensure you have all the necessary elements set up, requirements met, any needed additional components acquired, and testing plan established.

Recommended Activities

Review your Implementation Workbook, specifically the Document tab, with your team and see if there are any updates that should be made based on what you have learned about Templates, Attachments, and potential exceptions.

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