



eSign Cloud

Creating Templates: Brief Review

Using this Guide

The self-paced learning approach to the implementation of IMM eSign provides an institution with control over the pace at which its employees will learn the materials needed to understand, implement, utilize, and support their solution.

This guide serves as a reference tool as well as a companion guide to the first lesson in Stage 4: Creating Templates—Brief Review.

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 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

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.

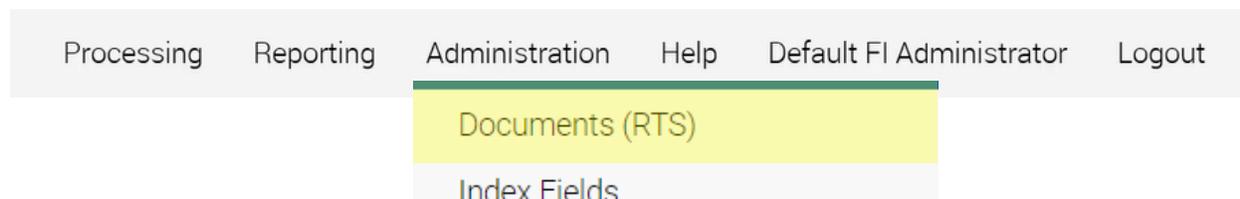
The recognition is accomplished using **TEMPLATES**. Templates are a set of instructions, or a collection of information, that are set up and administered by the institution both initially during implementation and ongoing as new types of documents are added or existing documents are changed. Therefore,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

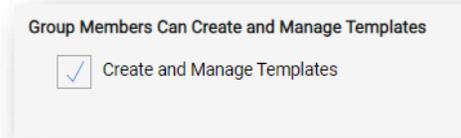


The Document Maintenance page, which will be covered completely in the next two lessons, is not only for designing templates, but is also used to define attachments (Lesson 4), import templates that may have been made previously and saved as a backup or shared by your IMM specialist, export templates 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.