



eSign Cloud

Creating Templates: Additional Items and Exceptions

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 4: Creating Templates—Additional Items and Exceptions.

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

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 displays the 'Document Maintenance (RTS)' interface. On the left, there is a search panel with fields for 'Document Type' (set to 'All Types') and 'Document Name'. The main area shows 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 types and their associated attachments, each with a checkbox and icons for deletion and export.

Document Type	Attachment	Actions
ACCOUNT_ACTIVITY_PROFILE	NAC_ACCT_ACT_PROFILE	<input type="checkbox"/> [OCR] [Delete] [Export]
ACCOUNT_INFORMATION_SHEET	NAC_VMPC656_0409	<input type="checkbox"/> [Delete] [Export]
ACH_DEBIT_STOP_PAYMENT_REQUEST	NAC_ACH_STOP	<input type="checkbox"/> [Delete] [Export]
ACH_UNAUTHORIZED_DEBIT	NAC_ACH_AFF	<input type="checkbox"/> [Delete] [Export]
ATMNIIGHT_DEPOSIT_PRECAUTION	NAC_UPN_ATM_LAZ	<input type="checkbox"/> [Delete] [Export]

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.

MULTI_PURPOSE_SIGNATURE_CARD
Multipurpose Signature Card

SYS_SIGNATURE_CARD

Details
Index Fields
Imaging Indexes

Full Name

Short Name

Description

Archive

...
Yes

Display Document While Processing

...
Yes

Review by Non Signing Parties

Review by All Parties in the Session

Review Only by Parties on this Document

Platform

Select Platform
▼

Save

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.

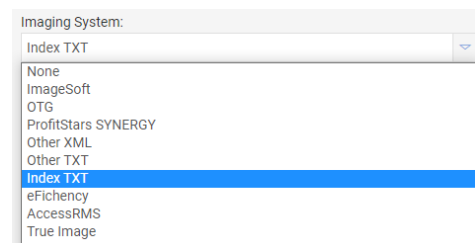
Regardless, we still recommend that you try creating a few templates as if there is no integration – the practice will ultimately help you understand the solution.

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.