eSign Cloud
Creating Templates: Template Creation

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 second and third lessons in Stage 4: Creating Templates—Creating a Template and Breaking it down.

You should watch the videos located on the lesson pages 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 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

©2021 IMM All rights reserved

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.

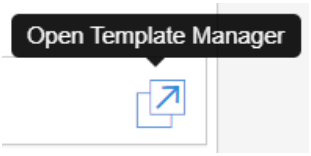
Sometimes the most time-consuming part of templating is creating the source documents that you'll use. Once you have those ready and print them to eSign you'll

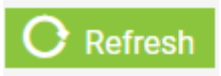
- Designate the Document Type
- Define the Indexes
- Designate Parties and Signature Locations
- Perhaps add Data fields
- Test

©2021 IMM All rights reserved

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:

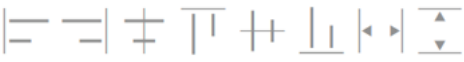
- Designate the Document Type
- Define the Indexes
- Designate Parties

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.

©2021 IMM All rights reserved

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.

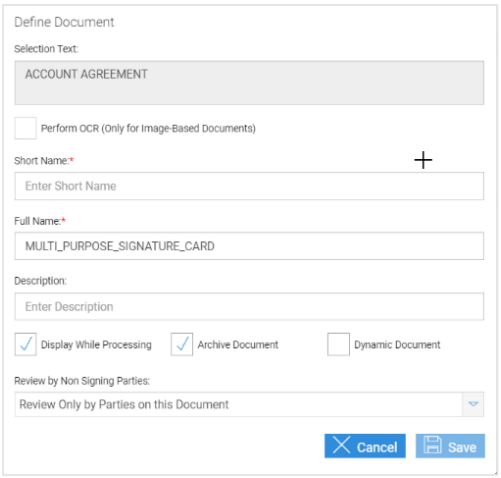
The download document button simply downloads the PDF you're using for this template onto your workstation. The upload document button lets you replace the existing sample document with another one. This might be useful if you have a newer version of the document that you'd like to use to edit the template.

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.

©2021 IMM All rights reserved

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.

©2021 IMM All rights reserved

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.

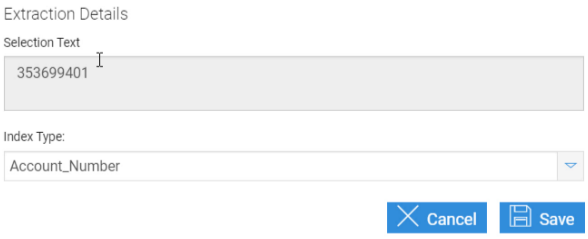
In Stage 3 you learned how to create new index types that can then be used when templating documents.

In Template Manager we use the Add Index tool IDX 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 willl 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 OCRed 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.

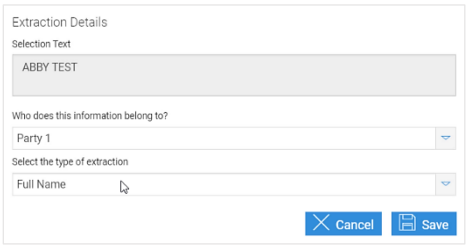
©2021 IMM All rights reserved

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.

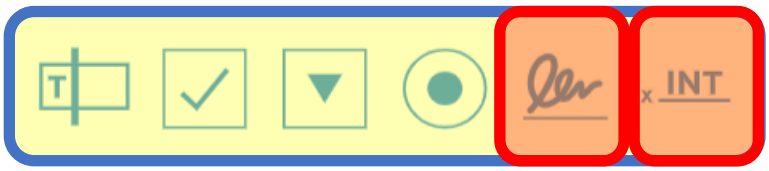
Adding additional Party Data

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.

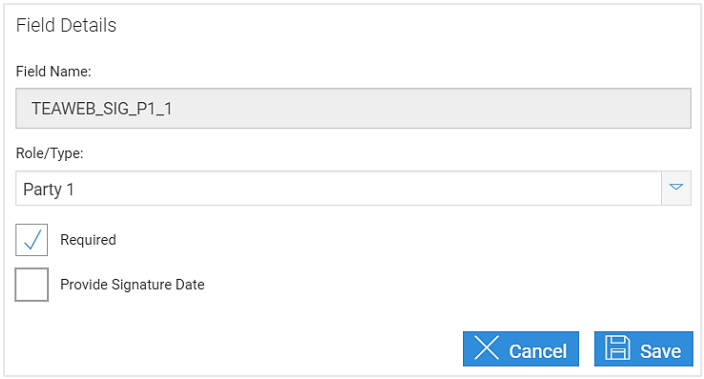


©2021 IMM All rights reserved

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:

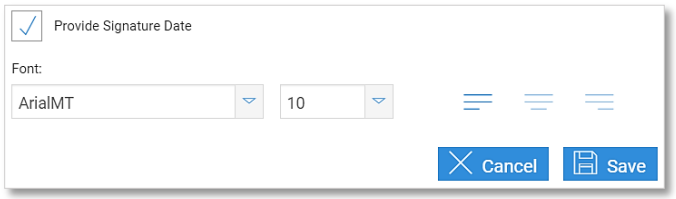


Field Name will be a default. The value can be translated as follows: TEAWEB is a product way of referring to eSign (it's legacy), SIG means this is a Signature field, P1 stands for Party 1 and the trailing "1" indicates that this is the first signature field for **this** party on **this** document (you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

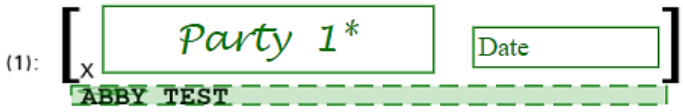
Role/Party is where you assign the Party to the field. The default will be the NEXT party number, but if you want to assign it to an already assigned party, simply change that here, and the Field Name will update accordingly.

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.



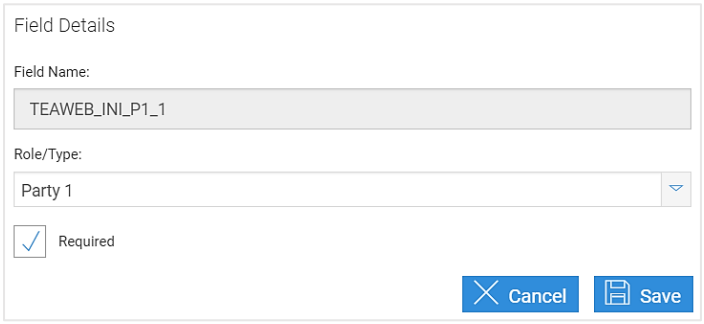
Once you click **Save**, the Signature field, and optionally the date field, will display on the template document. You can click on the fields and move them around to where you would like them located. **NOTE**: if you'll be adding other fields sometimes it's easier to just add all the fields and then move them around afterwards.



©2021 IMM All rights reserved

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.



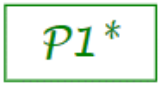
Field Name is similarly structured but indicates "INI" for Initial field.

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.

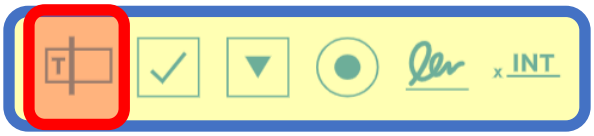


Data Entry Fields

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

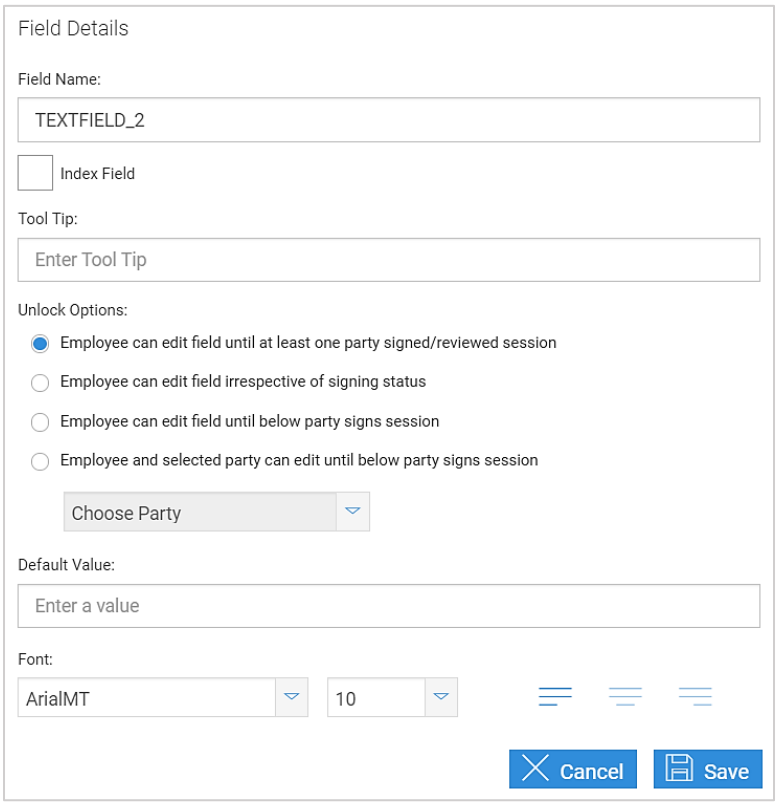
The first of the Data Entry fields is a text field where you might want the employee or signer to type in some value.



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.

©2021 IMM All rights reserved

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



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.

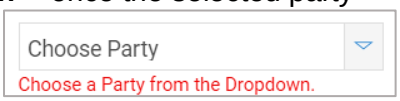
Tool Tip Text entered here will pop-up for the user when they hover over the field. It is often useful to include allowable characters or formatting information. (E.g., "please enter Tax ID as only digits with no spaces or dashes")

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

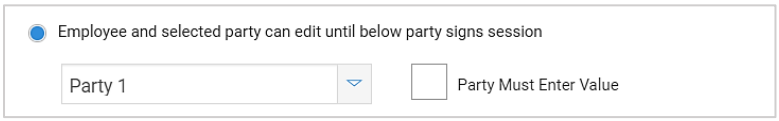
- **Employee can edit field until at least one party signed/reviewed session** – once at least one signer has finished the session the field is then locked.

©2021 IMM All rights reserved

- **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**.



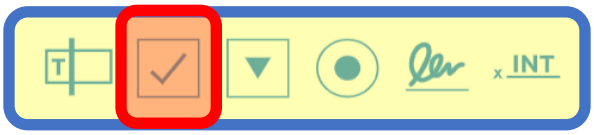
Default Value will pre-populate the field with some value – this is often left blank.

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.

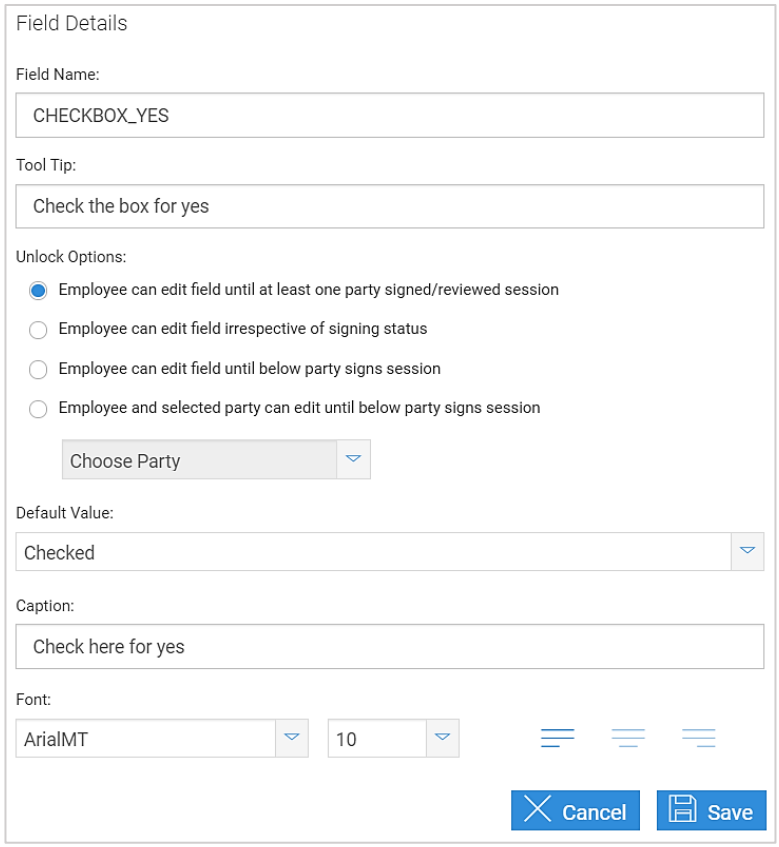
Data Entry – Check Box

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.

©2021 IMM All rights reserved



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 moved it around as needed.

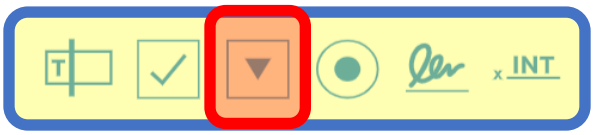
Font Use these options to control the font type, size, and alignment in the field.

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.

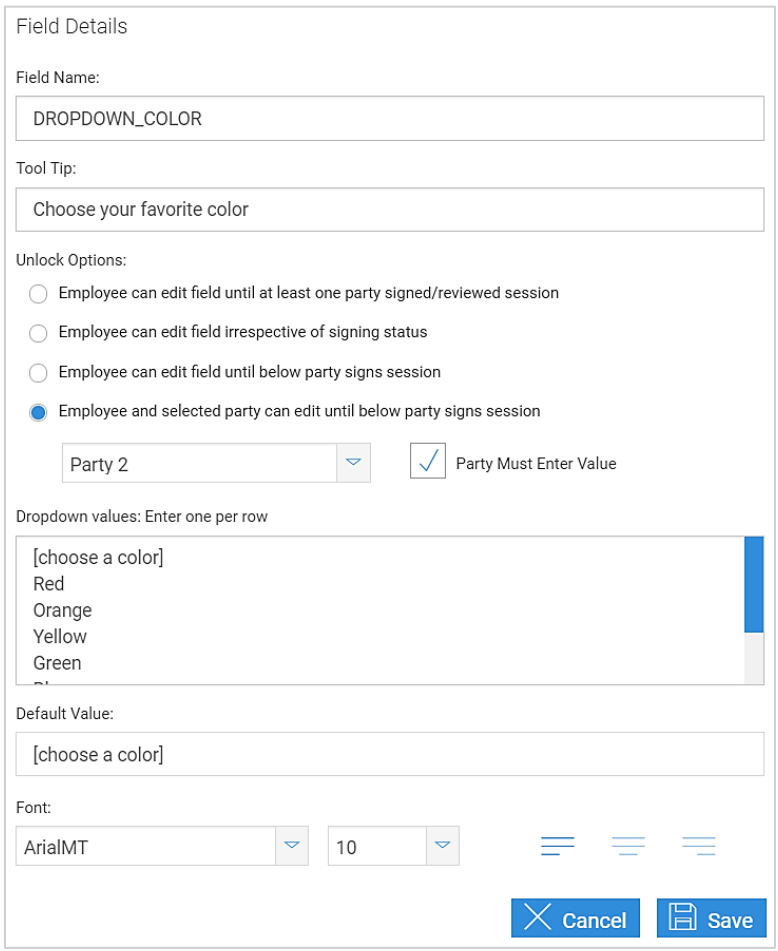
©2021 IMM All rights reserved

Data Entry – Dropdown List

The next Data Entry field is a dropown. 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.

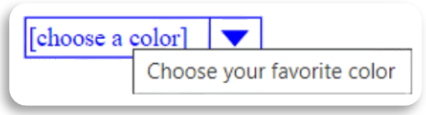


Once you click and drag the dropdown option onto the document, you'll see a very similar Field Details to those above with a few important differences.



Field 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



©2021 IMM All rights reserved

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.

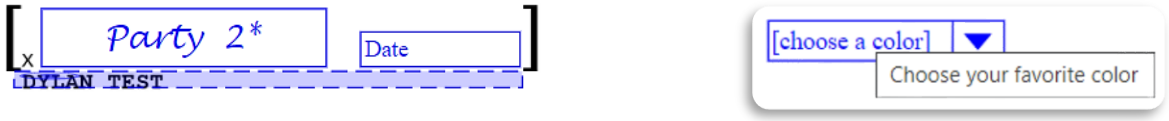
Default value Use one of the values from the list as the default value. Sometimes people use a value like [select from list] rather than one of the actual values.

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

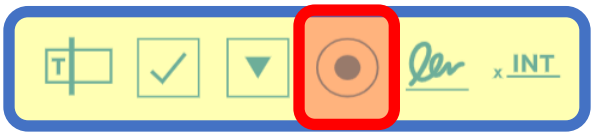
In the above example for a dropdown the field has been associated to one of the parties using the **Employee and selected party can edit until below party signs session** option. Since that party is indicated in blue on the template, the field will also be shown in blue and not black like the first two.



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

Data Entry – Radio Buttons

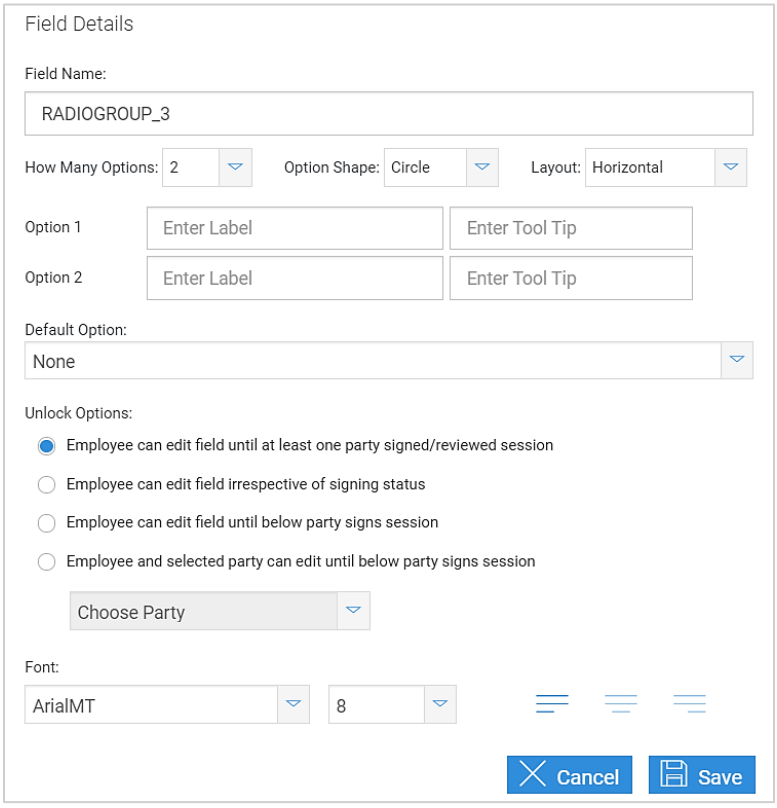
The last data entry option is the radio button. Radio buttons are useful when you have a selection of options and only want the user to select one.



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.

©2021 IMM All rights reserved

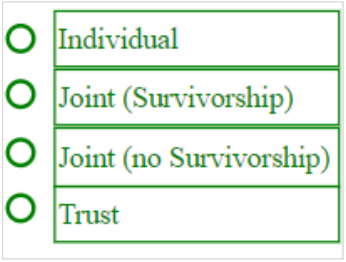
Once you click and drag the radio button option onto the document, you'll see a very similar Field Details to those above with a few important differences.



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.

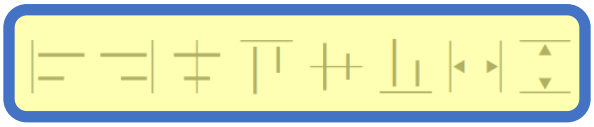
Unlock Options are the same as with the text field (above).

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.

©2021 IMM All rights reserved

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.

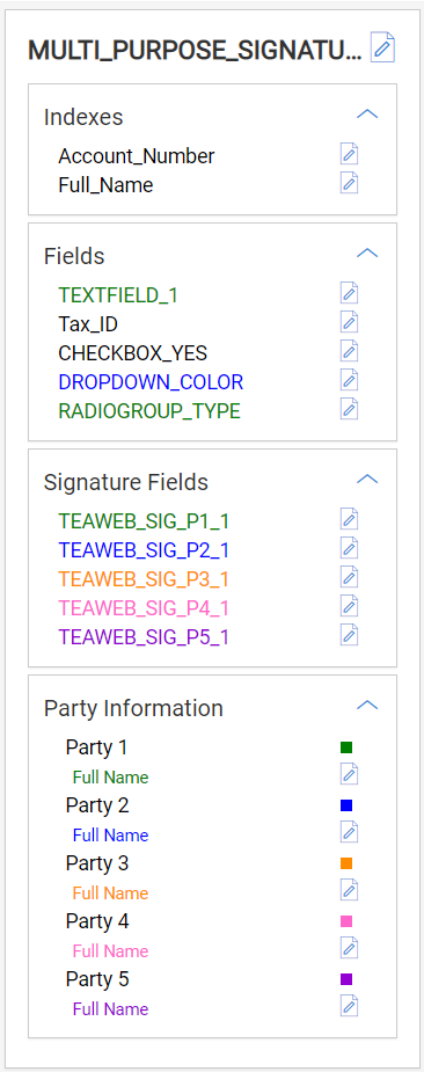
The video for this lesson walks through examples of this and is really the best way (other than just trying it out) to see how they work.

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.

©2021 IMM All rights reserved

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.

©2021 IMM All rights reserved

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.

©2021 IMM All rights reserved