Implementation Customer Profile

Welcome to the IMMeSign family. We appreciate your confidence in our company and our eSignature & Digital Transaction solutions and look forward to working with you to power the digital strategies and initiatives you have established for your institution.

This Customer Profile Form helps us gather key information vital both to the implementation process and for the ongoing management of the relationship between IMM and your institution for years to come.

Please complete the form by providing the information requested. The completed form must be returned prior to the scheduling of your kick-off call.

There is a section at the end of the form that will provide guidance on elements that may be confusing. However, if you should have any questions as you work through the form, please do not hesitate to contact your IMM Solutions Consultant or your IMM Implementation Project Manager.

Institution Information

Institution Name	
Street Address	
City, State & Zip	
Asset Size	
Website URL	
Institution Logo	• PNG File format: 60px tall x 200px wide • Please email promptly to your IMM Project Manager
Number of Branches	
Number of Employees	
Product Purchased	IMM eSign Version: _Please complete if known_
What was the Primary Goal for the purchase of eSign?	

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Key Institution Personnel & Contacts

Role: Purchaser

Name: Title:

Phone: Mobile: Email:

Role: Project Manager

Name: Title:

Phone: Mobile: Email:

Role: Billing Contact

Name: Title:

Phone: Mobile: Email:

Role: IT

Name: Title:

Phone: Mobile: Email:

Is this a 3rd Party Vendor: If Yes, Indicate the Company:

Role: Document Administrator

Name: Title:

Phone: Mobile: Email:

Role: Training Resource

Name: Title:

Phone: Mobile: Email:

Role:

Name: Title:

Phone: Mobile: Email:

Role:

Name: Title:

Phone: Mobile: Email:

Additional Information

For example, note who will be serving as remote signing (Adobe) portal administrator, etc.

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Primary Business Systems

	Live	Hosted	Use with eSign

Core Financial System

Loan Origination System(s)
(Please name all, See Notes for important information)

Account Opening System

Mortgage Origination System

Imaging/ECM
(System(s) you use to store Document Images for archival purposes—See Notes for important information)

    If using Fiserv Director or Nautilus – have you purchased DIP?

    If using CenterDoc - do you have an SFTP connect?

Index/Search Keywords
(The primary indexes used in the Imaging/ECM system(s) for common searches)

Doc Provider
(If not above, name of separate doc provider for compliance documents if applicable)

Additional Systems
(Other key business systems not listed above)

What is the 1st priority Business System or Department for the initial implementation. Please describe the process or activity.

Desired or required go-live date
(If applicable, please use format mm/dd/yyyy)

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IT Infrastructure and Environment Information

In-House Data Center

Cloud/Hosted Provider

(If you answered No in the above field)

Will there be a Staging/Testing Server

(Highly recommended)

Email Server/Host Name or IP Address

(See Notes)

Valid Email Account acting as the "FROM" recipient

(See Notes)

Workstation Type   Standard Windows Desktop PC   Thin Client   Combination

(Be sure to complete Workstation Information section below)

Number of Workstations for eSign

In-Person Signing Devices   Make: Model Number

(If applicable/known)

If Yes, Owned or Purchasing

Additional Information
Relating to your in-person/in-branch signing strategy

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Workstation Information

Installer will need to be logged in to workstation(s) as an Administrator.

Workstation Operating System   Include Version if standardized

Internet Browser & Version

Thin Client Information   Citrix: Version:

RDP: OS:

VMWare Horizon: Version:

(If applicable/known)

Number Thin Client Servers

Number Thin Client Workstations

Floating Users

Load Balancing

Additional Information
Please share any unique details about your workstation environment

IMM eSign

IMM eSign
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Server Information

The eSign server cannot be installed on a domain controller.
For the actual installation, your IMM Installer will need to be logged in as a Domain Administrator.

Server Name(s)   Production: Staging/Test:

Server Operating System & Release

Server IP Address

Antivirus Software

Virtual Environment Used

(If applicable/known)

SQL Server Name

(If applicable/See Notes)

During install DBAdmin must have credentials for SA account (or similar account with equal privileges) and password

User/Group Information

Installation prompts for a user and group with sufficient rights to run services and authenticate with Active Directory.
These must be set up prior to Installation.

Domain Account User

(User account that can read the Active Directory and possesses rights to run Windows Services. eSign supports Active Directory Security Groups (Distribution and Sub/Nested Groups are not supported). Provide the Domain Account name that you establish or intend to establish.)

Domain Group

(IMM eSign requires a domain group to be created and include the users that will use the solution. Provide the name of the group you establish or intend to establish.)

IMM eSign

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Remote Signer Authentication

If known, please specify which option(s) will be used for remote signer two-factor authentication. Leave blank if unknown at this time.

Secret Password   Available: Default:

KBA   Available: Default:

(Knowledge-based Authentication)

Phone Authentication   Available: Default:

(Text Code)

Government ID   Available: Default:

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Additional Information and Notes

The information below is provided to assist you with the completion of the Customer Profile form. If you have further questions, please do not hesitate to contact your IMM Account Representative or your Implementation Project Manager.

Institution Information Section

Institution Logo	Please supply your Institution logo in PNG file format: 60 pixels tall x 200 pixels wide by emailing it directly to your IMM Implementation Project Manager.
What was Primary Goal for the purchase of eSign	Please describe your institution's key objective(s) in purchasing IMM eSign and include any specific goals you have for the project.

Key Institution Personnel & Contacts

Please use this table to provide the requested information for the individuals at your institution who will fit into each of the various roles identified. If there are additional key personnel, you can enter them and their expected role in one of the open rows. Feel free to provide additional key contact information or other relevant information regarding contacts in the Additional Information field.

Primary Business Systems

Live/Hosted/Use with eSign	Please select Yes or No in these fields for each identified system to indicate whether this system is Live, if it is Hosted (as opposed to on-premise), and if you intend to Use it with eSign.
Loan Origination	Please name all Loan Origination systems if you leverage multiple for different loan types (Consumer vs. Commercial, etc).
	Note 1: If you are using LaserPro, please remember to acquire the ProSign Export Module for IMMeSign from your Finastra rep.
	Note 2: If you are using Compliance One, please indicate if you are using it for Consumer Lending and/or Mortgage Origination.
	Note 3: If your documents are dynamic in format, meaning that the content and location of signature fields can shift from loan to loan based upon specific loan criteria, please indicate so.
Imaging/ECM	What is the system(s) you use to store Document Images for archival purposes that will be interfaced with IMM eSign. If you use multiple systems – please name all and their specific use (i.e. System A: Loans, System B: Deposits).
	Note: If you are using Fiserv Nautilus or Director, or Hyland OnBase, please indicate if you have the Document Import Processor (DIP) module. If not – you will need to acquire this module from your Fiserv or Hyland representative.

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IT Infrastructure and Environment Information

In-House Data Center   Yes/No field – Is your IT infrastructure hosted within your own data center?

Cloud/Hosted Provider   If no above, i.e. IT infrastructure is hosted, please name the provider.

Will there be a Staging/Testing Server   Yes/No field – We highly recommend that each IMM eSign installation also have a staging/test environment.

Email server/host Name or IP Address   This information is needed to interface IMM eSign services with your email system.

Note: Email server relay must be enabled to accept traffic from the IMM eSign server. This will need to be done in order to complete Stage 1 of the implementation plan.

Valid Email Account acting as the "FROM" recipient   Note: eSign contains the ability to send internal emails to recipients of tasks for operational efficiency. The email is sent from an email account that you establish and share with us here. An example of an account would be eSignAlerts@InstitutionName.com.

Workstation Type   Thick clients are simply standard Windows Desktop PCs. If you use Thin Clients, note that there is additional information requested below.

Number of Workstations for eSign   What is the estimated number of Institution workstations that would be using IMM eSign.

In-Person Signing Devices   Yes/No field – Have you established what devices you will use for in-person/in-branch signing of documents? If so, please indicate what type of device in this field including the Make and Model # as appropriate.

Workstation Information

Number Thin Client Servers   If applicable, how many thin-client servers exist in your environment?

Number Thin Client Workstations   If applicable, how many thin-client workstations are in your environment?

Floating Users   Yes/No field – Do multiple employees utilize single workstations/single employees utilize multiple workstations?

Load Balancing   Yes/No field – Do you incorporate load balancing in your IT environment?

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Server Information

Server Name(s)	What are the names of the servers you have allocated for the IMM eSign application software for production and staging/test (if applicable).
SQL Server Name	On-premise eSign is compatible with SQL Express and the database can be installed on the same server(s) utilized for the eSign application software if desired. If you intend to use a dedicated SQL Server (by allocating an instance on an existing SQL Server) please provide the name of that server here. Note: During install, DBAdmin must have credentials for the SA account (or similar account with equal privileges) and password.

Remote Signer Authentication

Yes/No fields – For each option, please indicate if your institution wants to make the authentication option an available selection for your employees to select when submitting documents to be signed remotely, if known.

Also indicate if you'd like this to be the default option for sessions.

Secret Password	Note: There is no additional charge to use the password authentication method.
KBA (Knowledge-based authentication)	Note: KBA has an additional charge per your license agreement with IMM. Cost information can be found on the Schedule 1 portion of the license agreement.
Phone Authentication (Text codes)	Note: Phone Authentication has an additional charge per your license agreement with IMM. Cost information can be found on the Schedule 1 portion of the license agreement.
Government ID	Note: Government ID has an additional charge per your license agreement with IMM. Cost information can be found on the Schedule 1 portion of the license agreement.