eSign

2020.1

Client (RTS) Installation/Upgrade Guide

IMM eSign

Contents

eSign RTS Client Overview

eSign Client provides a browser-based environment for viewing, completing, capturing signatures, and printing integrated electronic forms. eSign Client can be a stand-alone application or be integrated with an existing host data processing system.

During installation, eSign Client will

- Install basic files needed for SigPad operation. Additionally, the SigPad setup software must be run.

- Check that the proper Acrobat Reader versions are installed

- Modify settings in Acrobat Reader to streamline operation with eSign Client.

Additional manual settings for eSign Client, Adobe Reader, and the SigPad may be required. The procedures for additional settings are listed in this guide.

New users will inherit the default setting during installation.

Additional users on a single client machine must run repair (Configure User Settings) to refresh Acrobat and SigPad settings stored in the Windows Users folder.

Prerequisites

> The procedures in this guide are for Windows 10. Your screens may differ if you install in a different environment.
>
> Installation procedures for these prerequisites are in the **Prerequisite Software Reference Guide**.
>
> Prerequisite software must be installed on each client machine.

The following software must be installed prior to installing or upgrading to eSign 2020.1 Client.

- On the Server machine:
  - eSign 2020.1 Server Components with at least 1 RTS FI configured

- On the Client Machine:
  - Windows 8.1 (Desktop), Windows 10 (Desktop/Tablet)
  - **Browsers** Supported (One of the following must be installed and set up.)
    - Internet Explorer 11.x
    - Firefox
    - Chrome
  - Installations in non-Active Directory environments require the service "Computer Browser" to be enabled and active.
  - **.Net Framework** for your specific OS
    - Microsoft .NET Framework 4.6.2 or Higher
  - For signature pad signing, refer to the Topaz Systems SigPlus Software and Drivers page: https://www.sigpluspro.com.
    - Additional plugins are required if using a Google Chrome or Mozilla Firefox web browser. Refer to the Topaz Systems SigPlus website for details about installing the latest SigPlus software and drivers: https://www.topazsystems.com/sigplus_extlite.html.
  - **Silverlight** (Required for Picture Capture)
  - **Scanners for Attachment Scanning**: (Required if scanned attachments will be used.)
  - **Cameras for eSignature Picture Capture**: (Required if using Picture Capture during the signing process.)
  - **Adobe Reader** must be installed for use with Internet Explorer**.**
    - Refer to the Adobe Reader Compatibility Chart for a list of supported Adobe Reader versions.

eSign Client Manual Installation/Upgrade

> **STOP** Installing this product requires a machine screen resolution of greater than 256 colors. If you are installing via a remote connection, the remote software must also be set to support greater than 256 colors.
>
> Client Server Add-ons must be activated before installing or upgrading eSign Client

Supported Upgrades

eSign 2020.1 Client can be upgraded from:

- eSign Client 2016.x/2017.x

eSign Client Fresh Installation/Upgrade

1 Map a network drive to the installation files.

Or

Copy the installation files to the client machine.

> *i* eSign Client should not be installed from a UNC path.

2
1. **Run the Command Prompt** *as Administrator*.
2. Navigate to the eSign Client Installation Folder.
3. **Run** "eSign Client.bat".

3 On some systems the **User Account Control** screen appears.

Click **Yes** to continue.

On some operating systems, the Open File - Security Warning window appears.
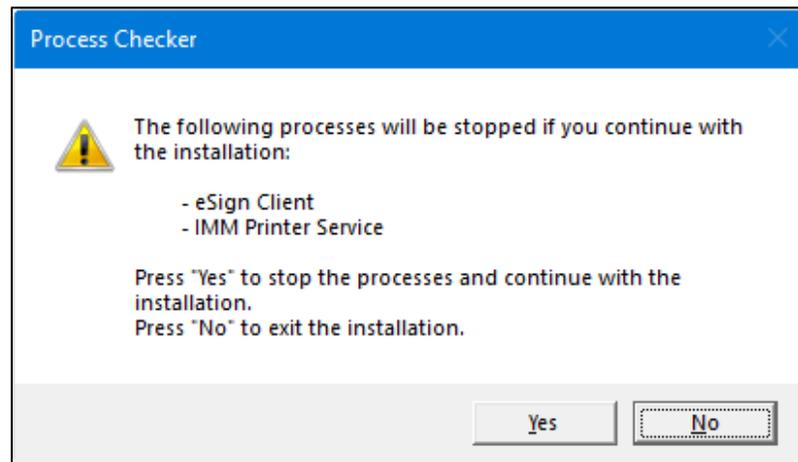
Click **Run**.

4   On some systems the **Windows Defender SmartScreen** screen appears.

Click **More info** to continue.
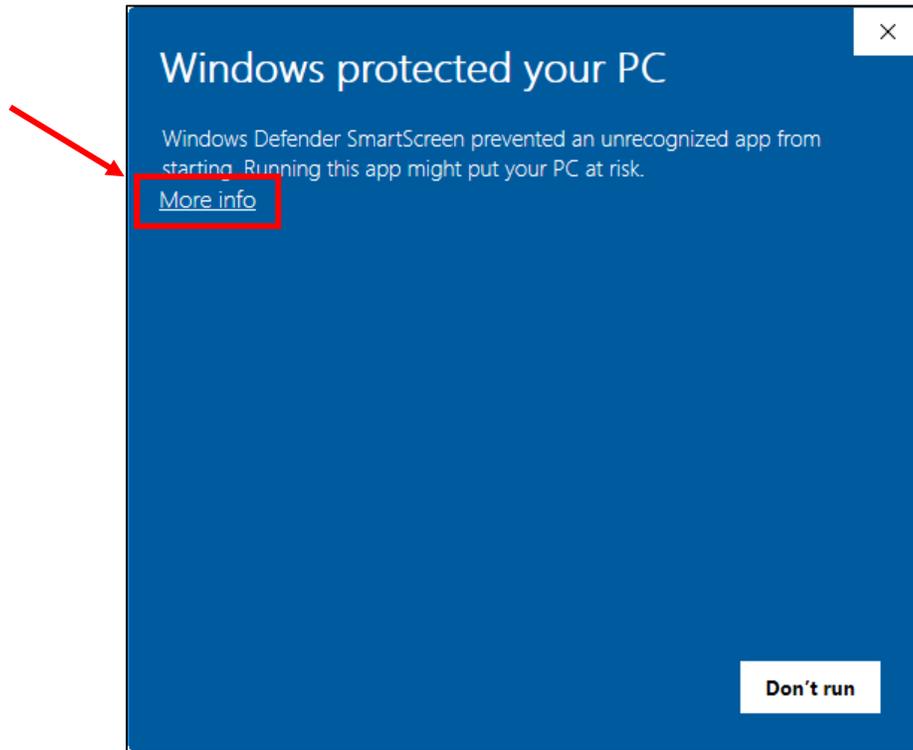
5 The **Windows Defender SmartScreen** refreshes.
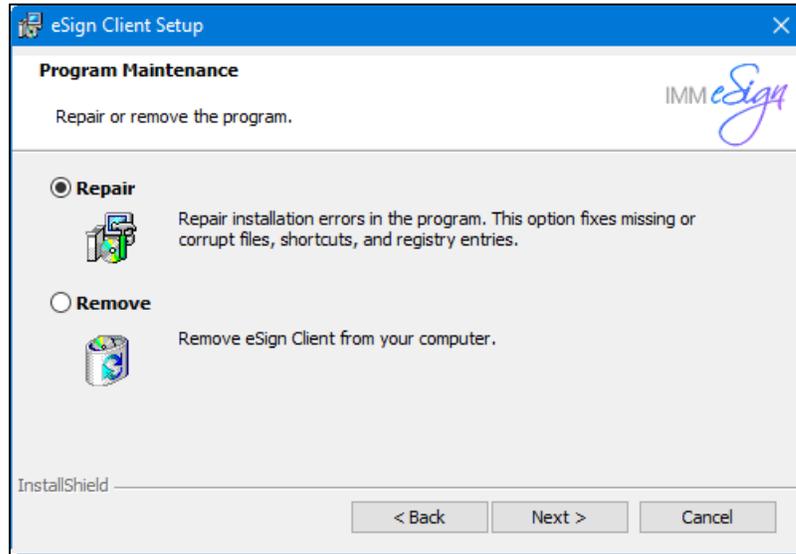
Click **Run anyway** to continue.
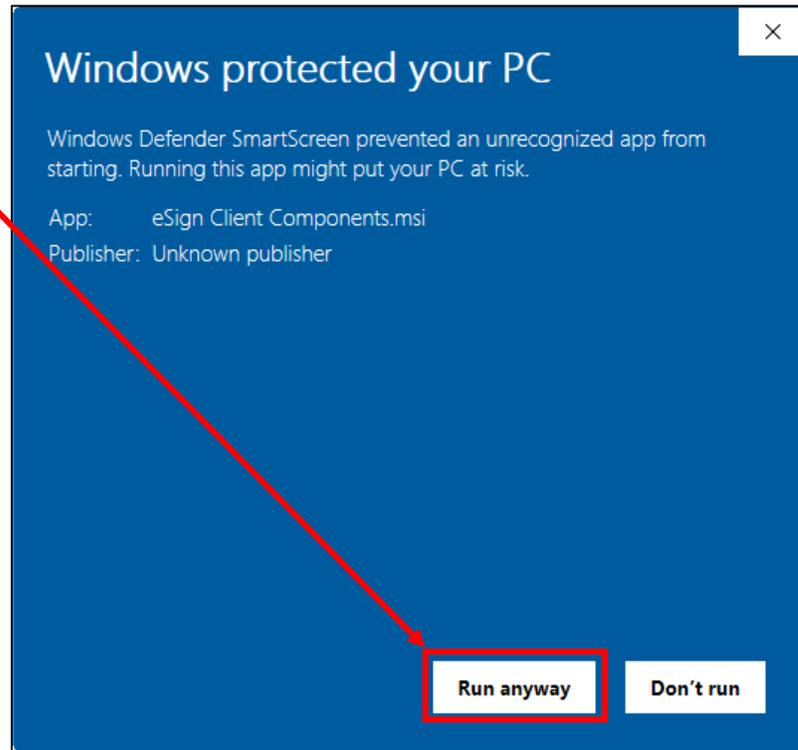
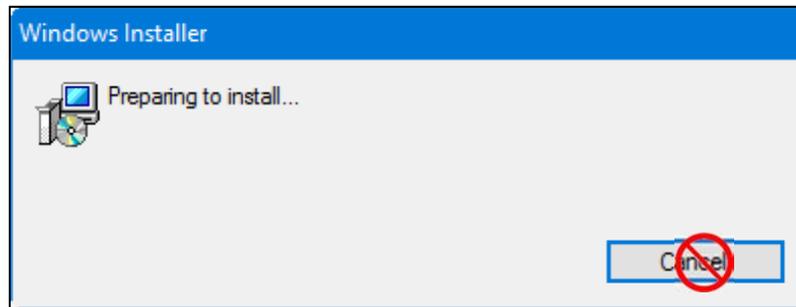**6** For an upgrade, the Process Checker window appears.

Click **Yes** to halt the listed processes.

Click **No** to proceed without halting the listed processes.

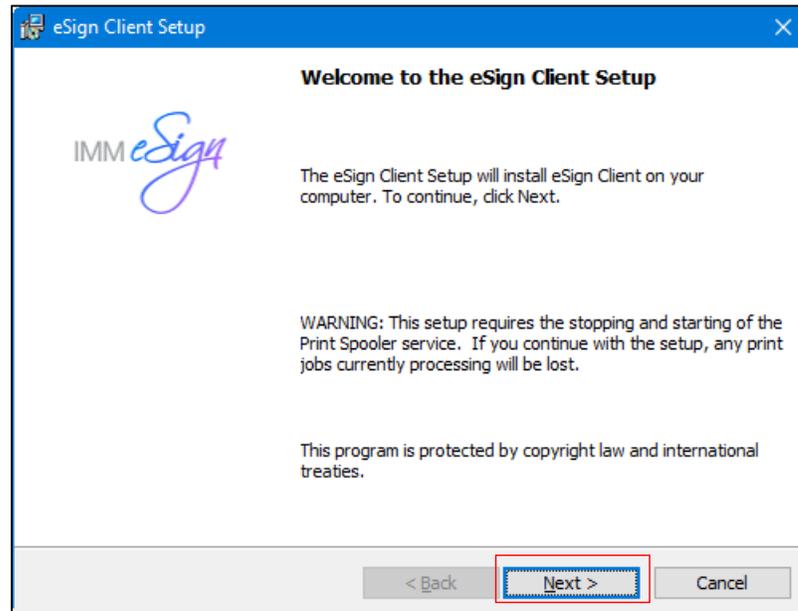**7**   For an upgrade, the Program Maintenance window appears.

Select **Repair**.

Click **Next** to continue.

8   The Preparing to install window appears.

Do not click Cancel during this portion of the installation.

9   The eSign Client Setup window appears.

Click **Next**.

10 The Destination Folder window appears.

- To select a different destination,
  - o Click **Change**.
  - o The Change Current Destination Folder window appears.
  - o Navigate to and select the *new destination directory*.
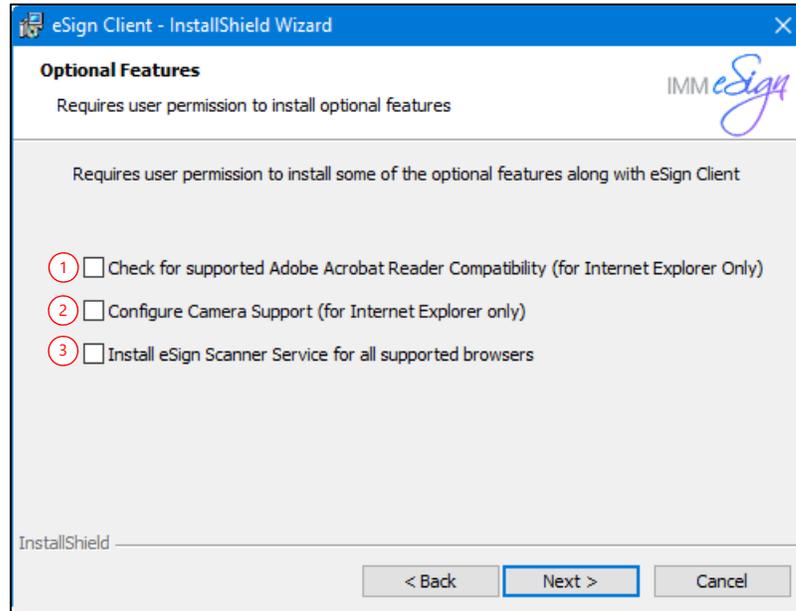 - o Click **OK**.
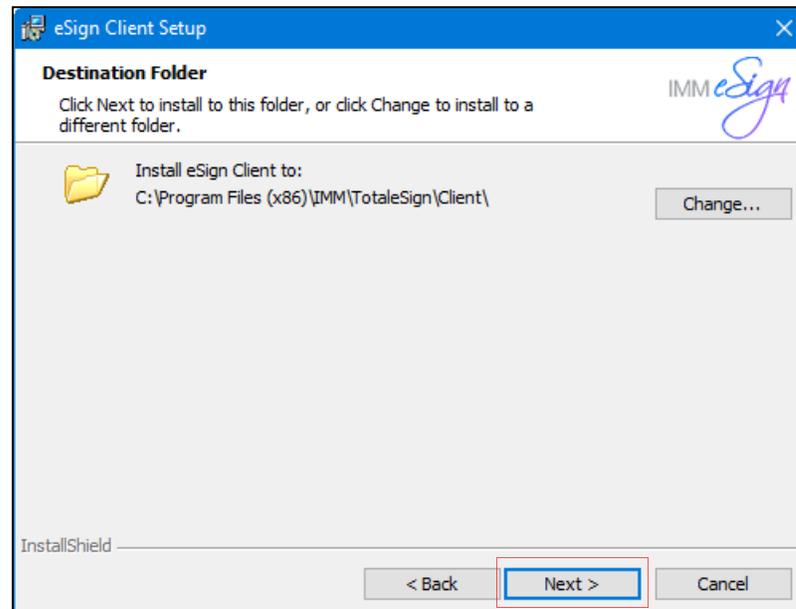
Click **Next**.

11   The Logon Information window appears.

1   **User name**: Enter the user account under which the Client Virtual Printer will run. If you created a local *IMMUser* account prior to the installation, enter it here. If you have another account that you prefer to use, use that instead. This user must be a member of the local administrator group on this machine and must be granted rights to Logon as a service.

2   **Browse**: Navigate to the user that will be used in this step.

3   **Password**: Enter the password.

4   **Logon as Local System Account**: *This is the preferred method*. When checked, the Local System Account will be used for this step. When not checked, a ① User Name and ③ Password will be required for installation.

5   Click **Next** to continue.

**12**   The Optional Features window appears.

Choose installation options for your client machine:

1   **Check for supported Adobe Acrobat Reader Compatibility (for Internet Explorer Only)**: When selected, installation will verify a supported version of Adobe Acrobat Reader is installed on the client machine.

2   **Configure Camera Support (for Internet Explorer Only)**: When selected, internal settings will be changed for use with Silverlight.

3   **Install eSign Scanner Service for all supported browsers**: When selected, the installation will add additional components for scanners. (If this option is not selected, scanner components can later be installed by the Administrator from the Edit Scanner Settings page on the workstation.)

After selecting the optional features, click **Next**.

13   The Ready to Install the Program window appears.

Click **Install**.
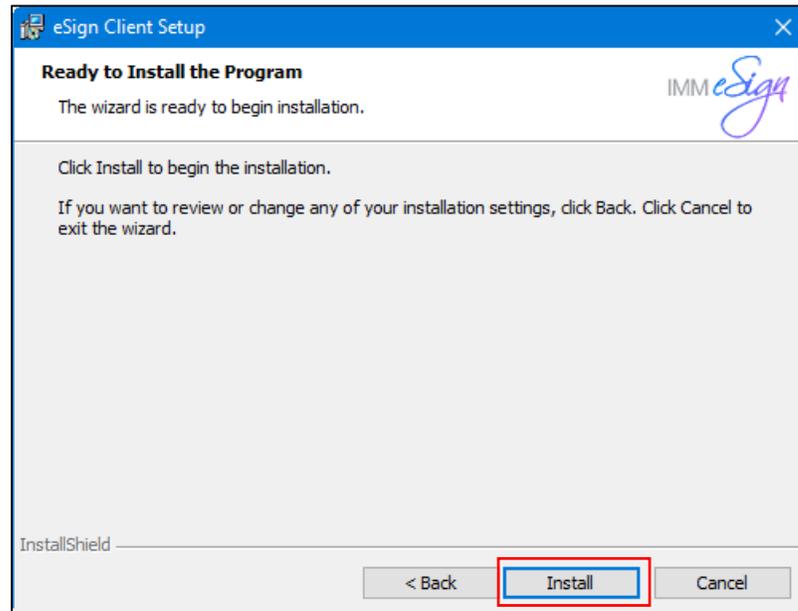
14   The Installing eSign Client window appears.

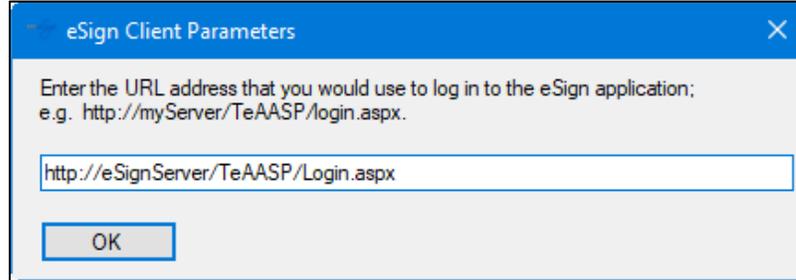__Do not click Cancel__ during this portion of the installation.
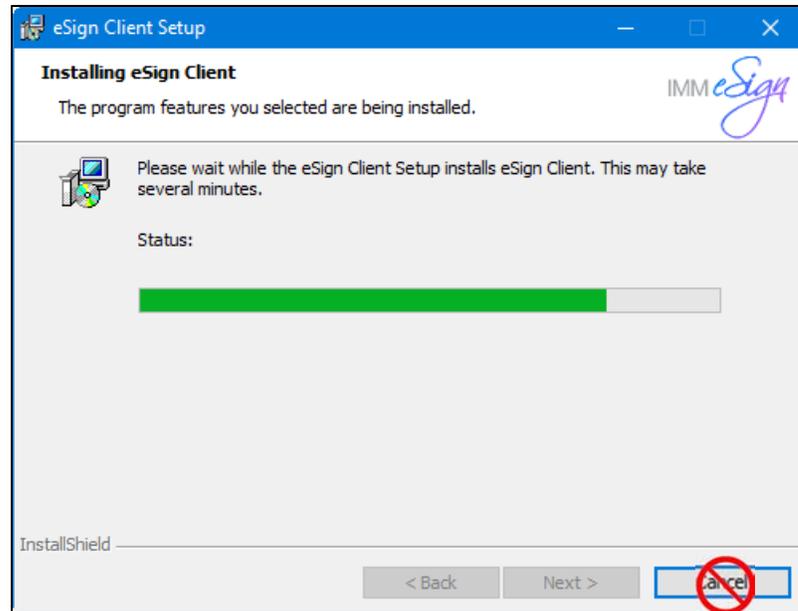
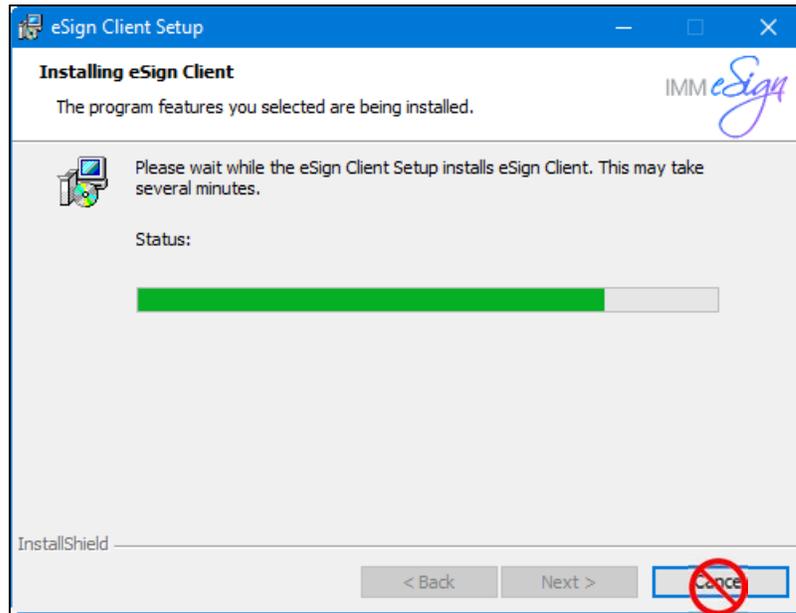**Fresh Installation**:

Continue with **Step 15** on page 14.

15 The eSign Client Parameters window appears.

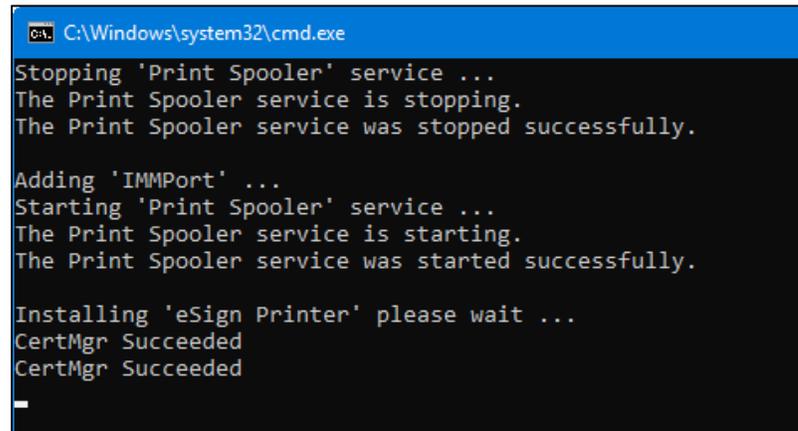Enter the full URL to the login screen, then click OK

- The URL prefix (HTTP/HTTPS) must be the prefix selected during the server components installation.

16 The Installing eSign Client window appears.

<u>Do not click Cancel</u> during this portion of the installation.

17   A DOS window appears while the print spooler updates.

This screen will close automatically.

18   If a supported Adobe product is not currently installed, this message will display.

Please install a supported Adobe product/version and run Configure User Settings (as an Administrator) from Start/Programs.
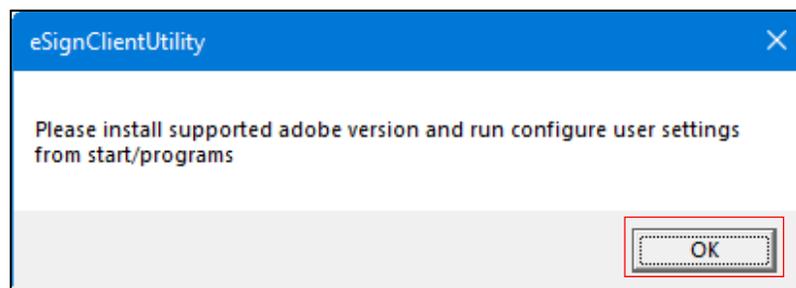
After eSign Client installation is complete,

Install a supported Adobe product.

Run **Adobe Settings / Configure User Settings** on page 25.

19   If the eSign Scanner feature was selected in **Step 12, Optional Features**, the eSign Scanner Installer window appears.

If you are *not using a scanner*,

If you are *installing a scanner*,

20   The Settings – eSign Scanner window appears.

1   **Installation Path**: The default installation path on the client machine.

2   **Browse**: Select a different installation path.

3   **Logon as Local System Account**: *This is the preferred method.* When checked, the Local System Account will be used for this step. When not checked, a ④ **User Name** and **Password** will be required for installation.

4   **User Name/Password**: Enter the user account with password under which the eSign Scanner will run. This user must be a member of the local administrator group on this machine and must be granted rights to Logon as a service.

5   Click **Install** to continue.

The installation process takes several minutes.

6   Clicking **Close** at this point will bypass the eSign Scanner installation.
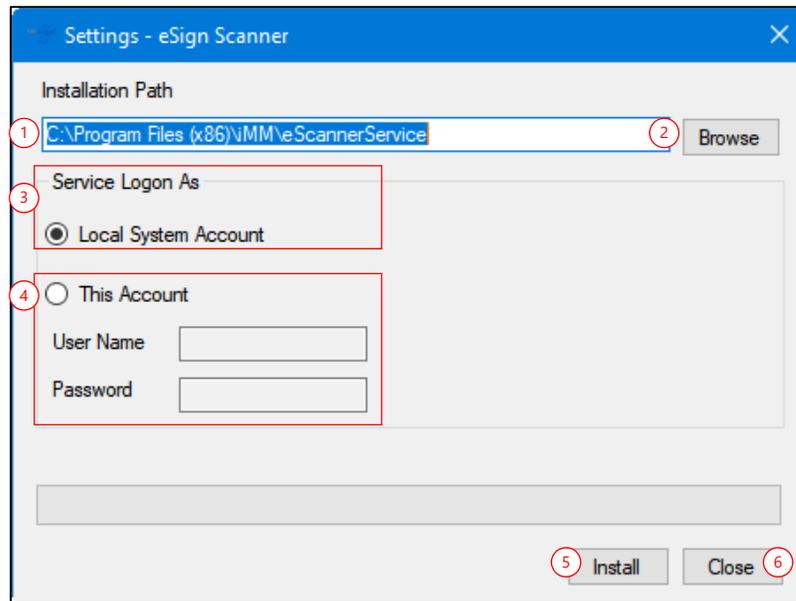
21 *After Installation Completed appears,*

Click **Close**.
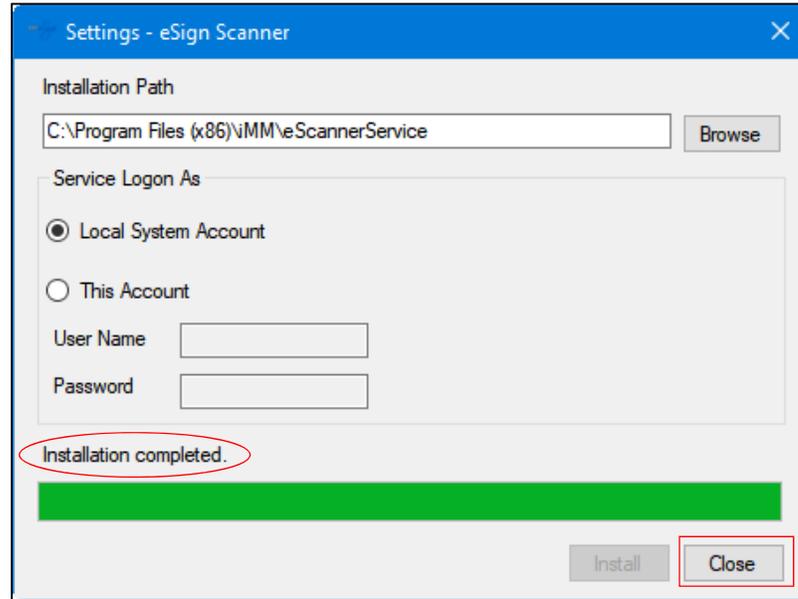
This creates a scanner service.

22 Two Scanner Client Notifications display during installation.
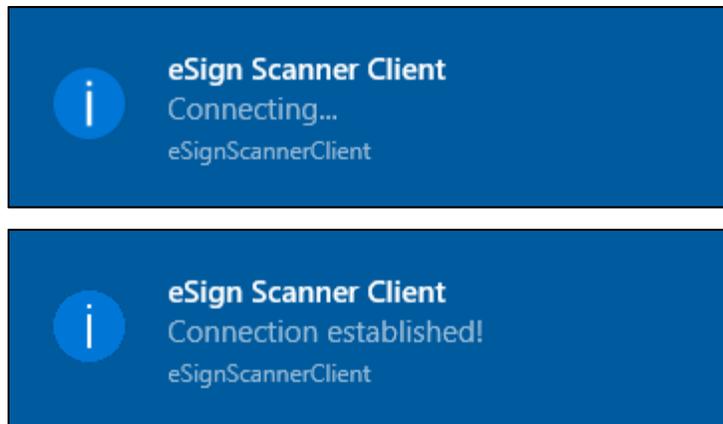
23   The eSign Setup Completed window appears.

Click **Finish**.

The eSign Client are installed.
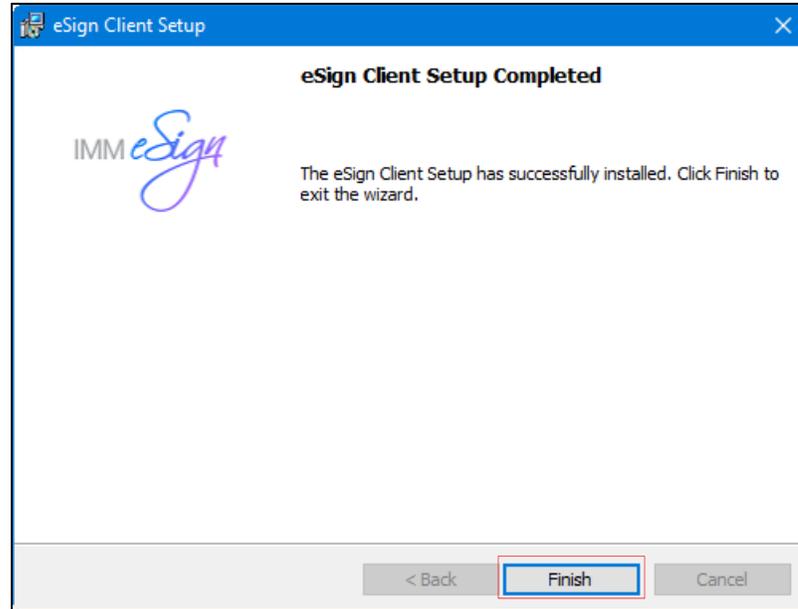
24   Before members of the Users Group can access eSign Client, they must be given Security permissions to the following default folder location:

Folder	Permissions
Default 32-bit: C:\Program Files\IMM\TotaleSign\Client\ Default 64-bit: C:\Program Files (x86)\IMM\TotaleSign\Client\	Full Control

The folders must be exempt from Live or Active Virus Scanning and from your Indexing Service.

26   Continue to .1

eSign Client Uninstallation

1   When eSign Client is uninstalled, you may be prompted to close applications in use.

Select *Automatically close…*

Click **OK**.
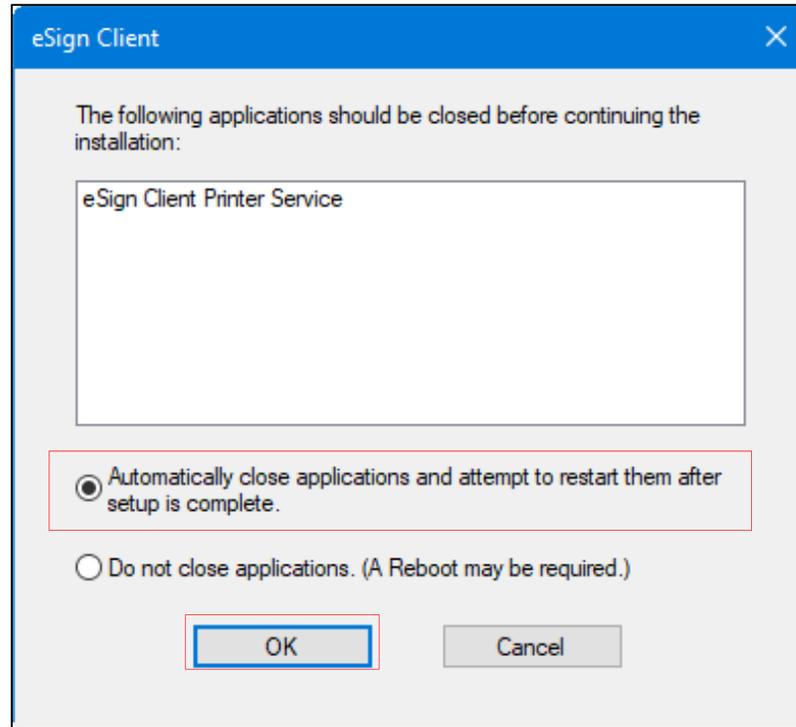
eSign Client Silent Installation/Upgrade

Silent installations may be accomplished by performing the following procedures. This makes it possible for network administrators to push the install or upgrade out to user machines according to their own schedule.

MSIEXEC Command Line Switches Used

/x – Uninstalls a product (can be product installation application or product ID).

/qn – No user interface

/i – Installs/configures a product

/norestart – the machine will not restart after silent installation

Silent Install

1   Decide on the Access password for the server (during server installation).

2   To perform a silent initial install, use the following command lines:

```
msiexec.exe /i "<NetworkLocation>\eSign Client.msi" /qn
    TEAURL="http://YourTeARTSServer/TeAASP/Login.aspx"
    ACROBATINSTALLCHECK="1" CAMERASUPPORTINSTALL="1"
    TEAHOSTNAME="YourHostName"
    TEAHOSTIPADDRESS="YourServerIPAddress" /norestart
```

Parameter Reference

Parameter	Usage
<NetworkLocation>	Fully qualified path
TEAURL	Web address of your Login.aspx (***Required***) ℹ If the URL contains a space, you must surround it with a triple set of quotes, such as """http://Your TeARTS Server/TeAASP/Login.aspx""".
ACROBATINSTALLCHECK	When selected, installation will verify a supported version of Adobe Acrobat Reader is installed on the client machine. (1=This option is selected. 0=This option will not be used; use if Internet Explorer will be used on the client machine to process sessions.) *Optional*: If not using Internet Explorer to process sessions, this parameter can be set to 0 or it can be skipped.
CAMERASUPPORTINSTALL	When selected, internal settings will be changed for use with Silverlight. (1=This option is selected. 0=This option will not be used.) *Optional* a. If the client is not using a camera, this this parameter can be set to 0 or it can be skipped. b. For an upgrade or the parameter is skipped, the existing camera settings will be retained. c. When this parameter is set to 1, the registry will be updated: `[HKEY_CURRENT_USER\Software\AppDataLow\Software\Microsoft\Silverlight\Permissions\http://localhost:80]`
TEAHOSTNAME	Used during camera installation (*Optional*) When Hostname and IP optional parameters are not used it will default to the Hostname given in the TEAURL parameter.
TEAHOSTIPADDRESS	Used during camera installation (*Optional*) When Hostname and IP optional parameters are not used it will default to the Hostname given in the TEAURL parameter.
ESIGNSCANNERINSTALL	When selected, installation will add additional components for scanners. (1=This option is selected. 0=This option will not be used.) • In a silent install or upgrade if, ESIGNSCANNERINSTALL = 1: Scanner components will be installed • ESIGNSCANNERINSTALL = 0: Scanner components will be uninstalled • ESIGNSCANNERINSTALL parameter is skipped: The application will check the config file to detect the presence of scanner components.

	o If the scanner components *are detected*, scanner components *will be installed.* o If the scanner components *are not detected*, scanner components *will not be installed.* *Optional*: If the client machine is not using a scanner, this parameter can be set to 0 or it can be skipped. Scanner components from previous versions are not compatible with eSign 2020. If you skip scanner component installation, the existing scanner components will not be updated. If you later decide to use a scanner, scanner components can be installed by the Administrator from the Edit Scanner Settings page on the workstation.

Silent Upgrade

To perform a **Silent Upgrade**, run the command prompt as an administrator.

Run `msiexec.exe /i "eSign.msi" /qn /norestart`

Parameters from the Parameter Reference table can optionally be included.

Post-Installation Settings

Browser Support

> ℹ️ The client application cannot be running when changing browser settings.

Refer to the Browser Setup Guide for Internet Explorer and Firefox settings.

Changing Server Connections

1   ℹ️ eSign Client components should not be installed or run from a UNC path.

On the client machine, browse to %Install Path%\IMM\TotaleSign.

Right-click **TeSign.GetClientParams.exe**.

Select **Run as Administrator**.

2   On some systems the User Account Control screen appears.
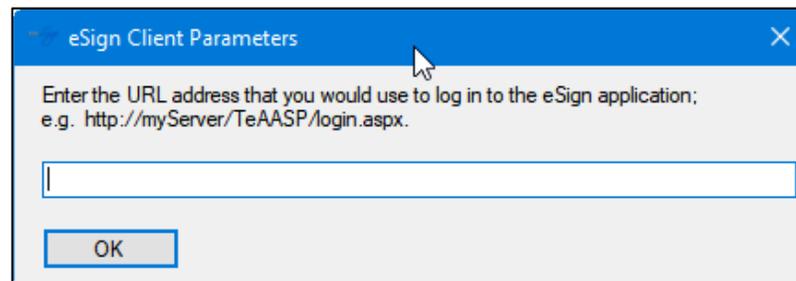
Click **Yes** to continue.

On some operating systems, the Open File - Security Warning window appears.

Click **Run**.

3   The eSign Client Parameters window appears.

Enter the URL address of the server you want to use.

4   This .EXE can be run silently from the command prompt as:

```
IMM.TeSign.GetClientParams.exe "2" "http://{ServerName
or IP}/TeAASP/Login.aspx"
```

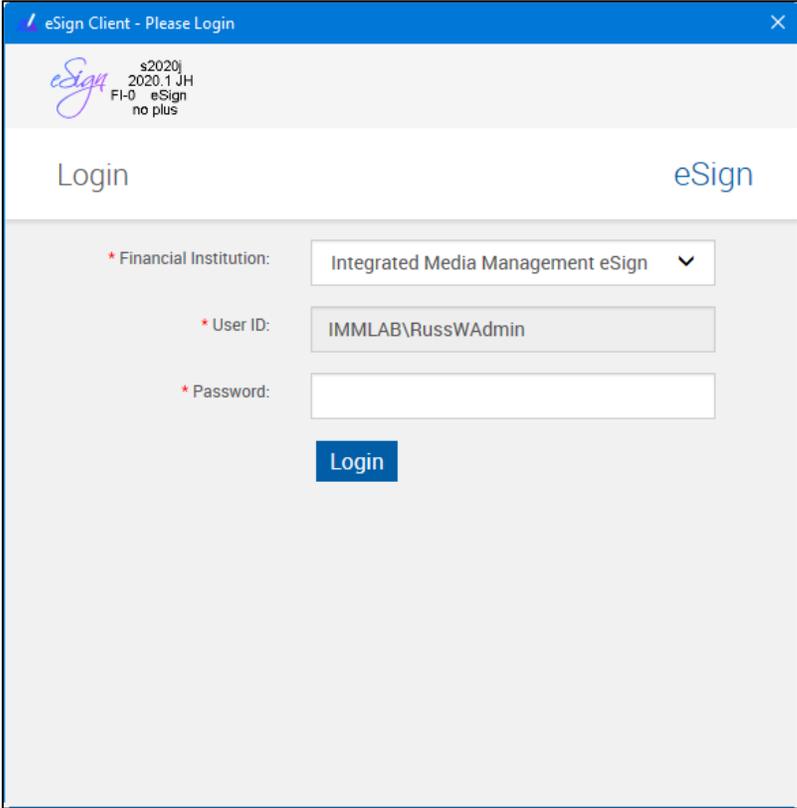**5**   eSign Client must be restarted after running the application.

Start eSign Client

After eSign Client has been successfully installed, it must be started to access Settings.

1   Click **Start > eSign Client** (to start eSign Client).

2   The **eSign Login** window appears with the Financial Institution populated from the installation procedure the first time any user starts eSign Client.

- **Financial Institution**: Preset during installation.
- **User ID**: ID of user logging into eSign based on the Windows login.

> ℹ️   The user ID must be created by the FI Admin prior to this step (if Auto Create User is not set to Create and Activate [HostAdmin]).
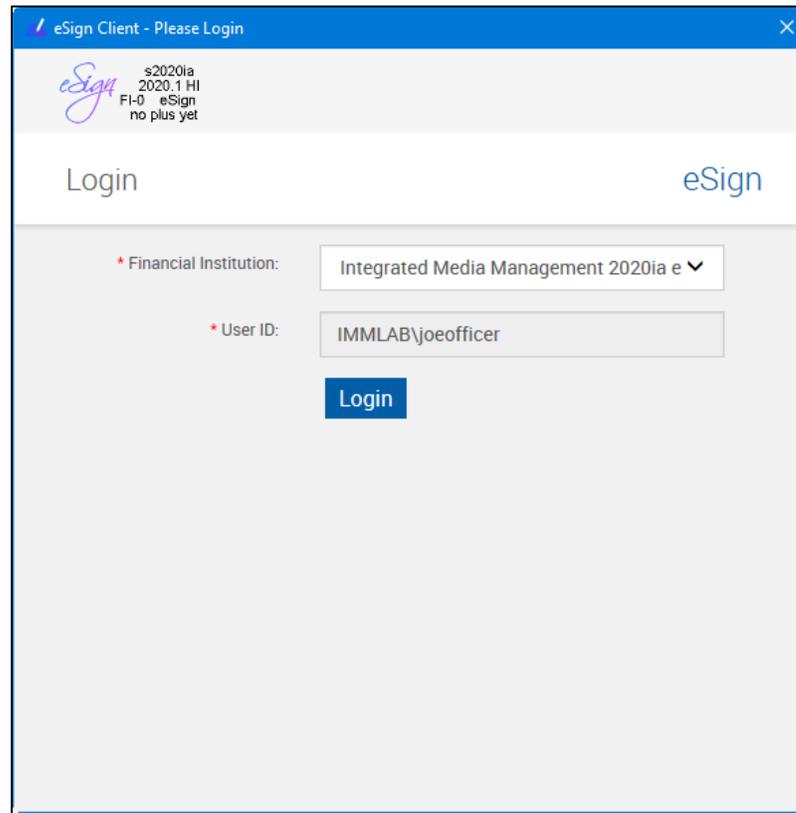
- **Password**: eSign password established when the FI is created.

After completing the Password,

Click **Login** to continue.

3   This page will display if the user is not authorized to login.

The user must be added to the User Maintenance page. Refer to the Administrator Help system.

Adobe Settings / Configure User Settings

If Adobe Reader/Professional or camera components are updated or modified or the eSign Client is upgraded, this procedure must be performed on for each user on all affected client machines.

|	Supported Adobe versions are listed in the Adobe Compatibility Chart.

	Please ensure all Adobe related windows are closed before performing this procedure.

1   Click **Start > Configure User Settings**.

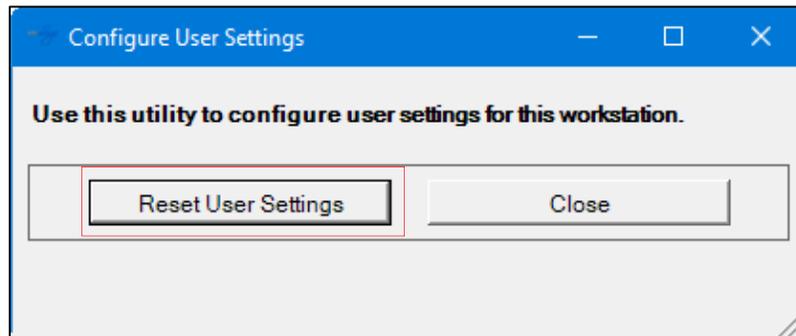**2**   In some environments the user may be prompted for Admin credentials.

3   The **Configure User Settings** pop-up window appears.

If no Optional Features were selected (**Step 12, Optional Features**), this pop-up window will display.
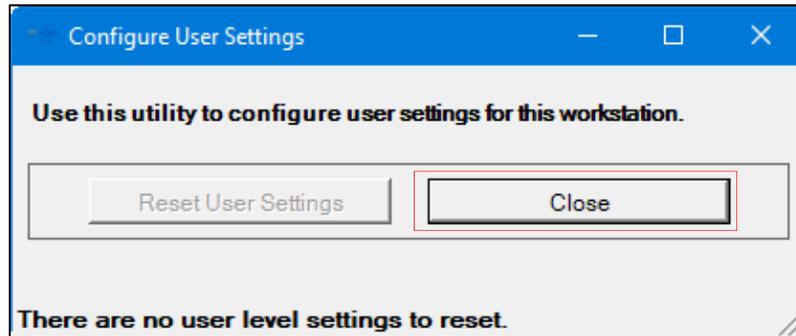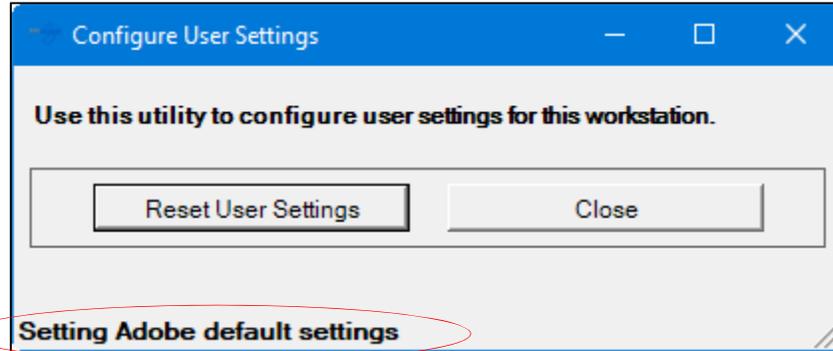

Click **Close**.

When Optional Features were selected (**Step 12, Optional Features**), this pop-up window will display.

Click **Reset User Settings**.
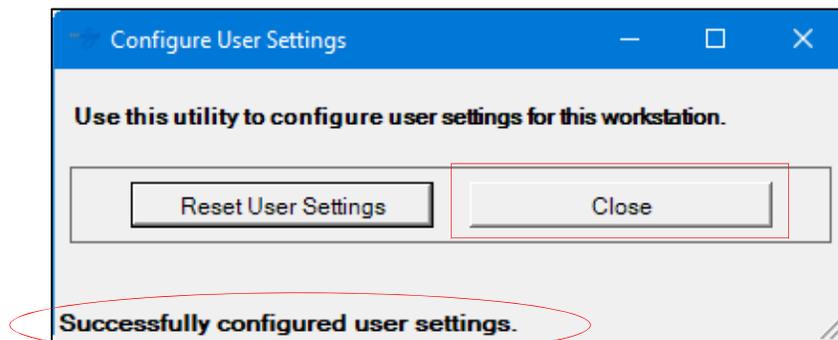
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4 The Configure User Settings popup updates with this message:

Setting IMM Adobe default settings.

> ℹ️ Refer to **Settings Performed** on page 28 for a listing of the settings changes.

Do not click Close at this point.

5 The Configure User Settings popup updates with this message.

Successfully repaired client components.

Click **Close** to complete.

Settings Performed

When the eSign Client components are installed, the following Adobe settings need to be updated. These changes are required only if Internet Explorer is the browser used by the client machine.

In Adobe Reader,

Click **Edit > Preferences**.

Category	Setting Name	Setting
Commenting	Enable text Indicators and Tooltips	Uncheck
Commenting	Create new pop-ups aligned to the edge of the document	Uncheck
General	Show splash screen (This setting is not available in all versions of Adobe Reader.)	Uncheck
Accessibility	Use document structure for tab order when no explicit tab order is specified	Uncheck
Internet	Display in Read Mode by Default	Uncheck
Internet	Display PDF in browser (This setting is not available in all versions of Adobe Reader.)	**Check**
JavaScript	Enable Acrobat JavaScript	**Check**

Setting Names in Green are performed automatically during eSign Client Installation and when the Adobe Settings / Configure User Settings *(page 25) is run.*
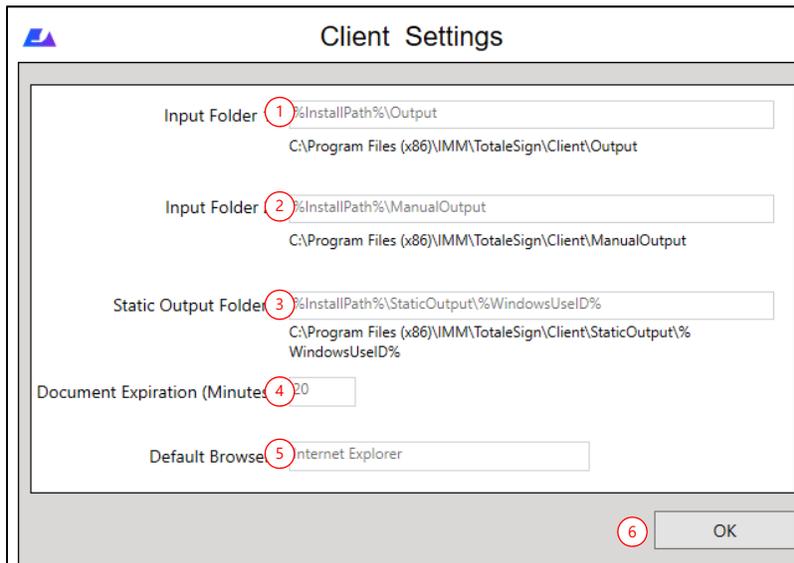

eSign Client Settings

> These settings can't be changed from the client and is managed by the Fi Administrator.

Right-click on the eSign Client icon in the system tray.

Click **Settings**.

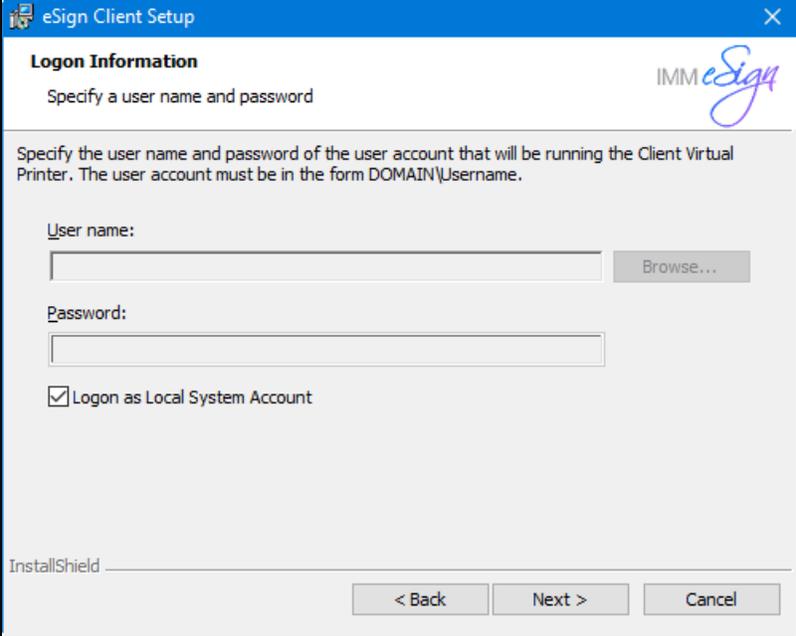When you select the Settings option, the Settings – eSign Client window appears.

The settings listed below are for reference only. They are managed by the FI Administrator.

1   **Input Folder 1**: This is the location of the Input Folder 1. This field is required. Documents that have been printed or saved to Input Folder 1 or Input Folder 2 will be automatically uploaded to the server by the client.

2   **Input Folder 2**: This is the location of the Input Folder 2. This field is optional. Documents that have been printed or saved to Input Folder 1 or Input Folder 2 will be automatically uploaded to the server by the client.

3   **Static Output Folder**: This folder is used by ARGO Imaging to hold the created PDF document. After the document creation is complete, the PDF is copied into Input Folder 1 along with the XML (idx) information.

4   **Document Expiration (Minutes)**: This setting determines how long printed and saved documents are retained for use. After the time limit is reached, the document will be purged and no longer available on the **Collected Documents** page.

5   **Default Browser**: This is the default web browser used to launch the **Collected Documents** page. If the selected browser is not available on the user workstation, the user's default browser will be used.

6   Click to close the window.

eSign Client Printer Folder Permissions

The eSign Client Printer uses user account settings for the eSign Client Printer Service (Windows service) for all operations. The default user for the eSign Client Printer Service is the Local System User (Logon Information, Step 11, page 11).

Folders and Permissions

Folder Name	Permissions required for Local System (eSign service user)

[eSignClientInstallPath]\IMMVirtualPrinter	Read & Execute
	List Folder Contents
	Read
	Write
	
	All files within this folder can be set to Read & Execute only with exception of following files created at run time:
	DataProvider*.log
	Stop.txt
	IMMPrinterSVC.Log
	
	Write permissions are required for this folder as log files and other sub folders are created at run time. The sub folders created will inherit permissions from this main folder. Sub folders created are:
	DataProcessor-Processing
	   - Error
	   - Logs
	   - Temp
	printoutput
	ReceivedFiles

[eSignClientInstallPath]\IMMVirtualPrinter\dpinst	Read & Execute List Folder Contents Read
[eSignClientInstallPath]\IMMVirtualPrinter\gs	Read & Execute List Folder Contents Read
[eSignClientInstallPath]\IMMVirtualPrinter iMMPrinterDataProcessor	Read & Execute List Folder Contents Read
[eSignClientInstallPath]\IMMVirtualPrinter\XMLListener	Read & Execute List Folder Contents Read
eSign Printer Output path	Read Write

Contact Support

Feel free to contact us with any issues or concerns.

Phone: 800.836.4750 Option 3 (8:30am - 10:30pm ET)

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