

eSign

2020.1

Client Components (XML) Installation/Upgrade Guide

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eSign XML Client Components Overview

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

During installation, eSign Client Components 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 Components.

Additional manual settings for eSign Client Components, 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 Components.

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

- On the Client Machine:
 - **Windows** 7/SP1, Windows 8.1 (Desktop/Tablet), Windows 10 (Desktop/Tablet)
 - **Browsers** Supported (One of the following must be installed and set up. Refer to the Browser Setup Guide for browser setups and settings.)
 - Internet Explorer 11.x (All features supported)
 - Firefox Default/with IE Tab Add-on
 - Chrome
 - Microsoft Edge
 - iPad Safari
 - **.Net Framework**
 - [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)
 - **Attachment Scanning**: (Required if scanned attachments will be used.) Only the following scanners have been certified for use with eSign 2020.1 Client Components:
 - ScanShell 3000D, ScanShell 3100D, Canon P-215
 - **eSignature Picture Capture**: The following cameras have been certified for use with eSign 2020.1 Client Components (Requires Silverlight):
 - Logitech QuickCam
 - Windows HD Camera
 - **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 Components Manual Installation/Upgrade



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.

Supported Upgrades

eSign 2020.1 Client Components can be upgraded from:

- IMM eSign Client 2017.x or higher

eSign Client Components Fresh Installation/Upgrade

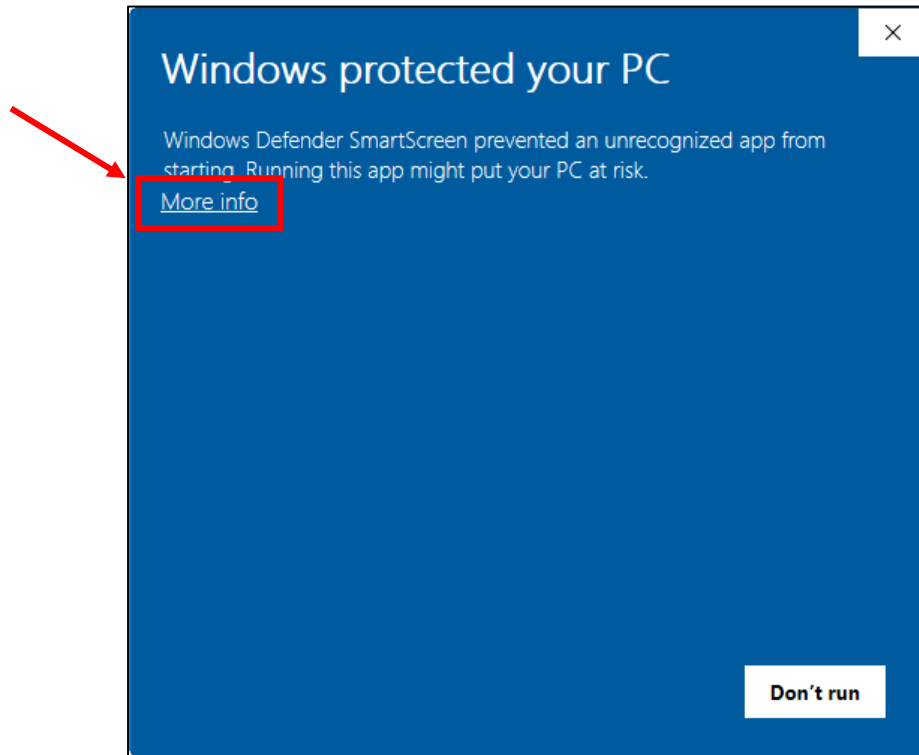
- 1** Map a network drive to the installation files.
Or
Copy the installation files to the client machine.



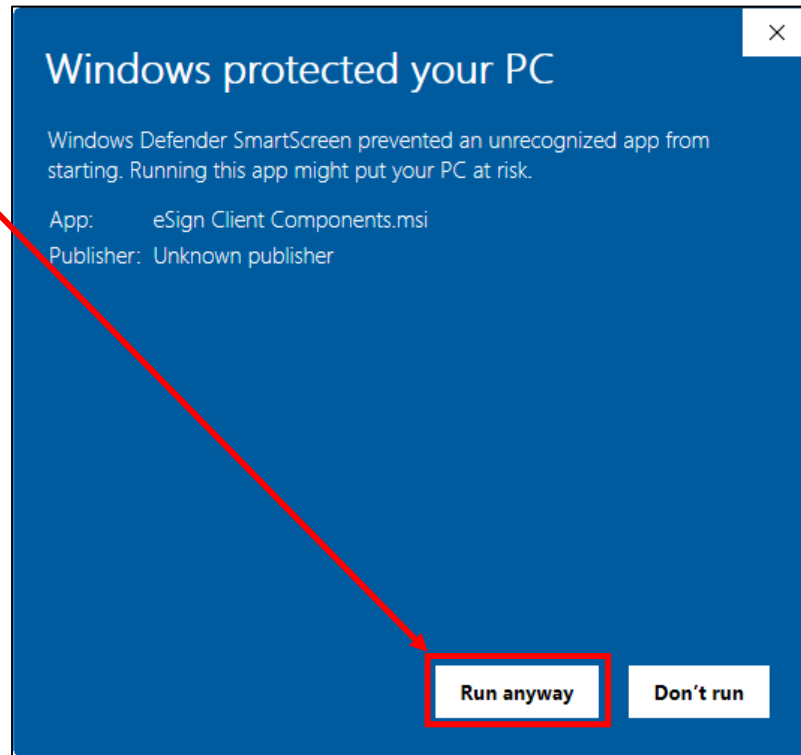
eSign Client should not be installed from a UNC path.

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

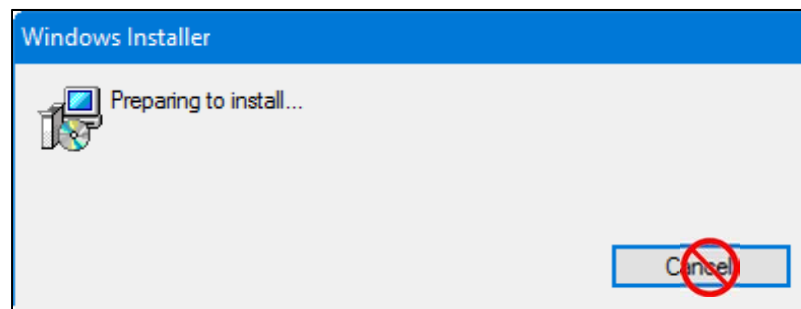
- 4** On some systems the **Windows Defender SmartScreen** screen appears. Click **More info** to continue.



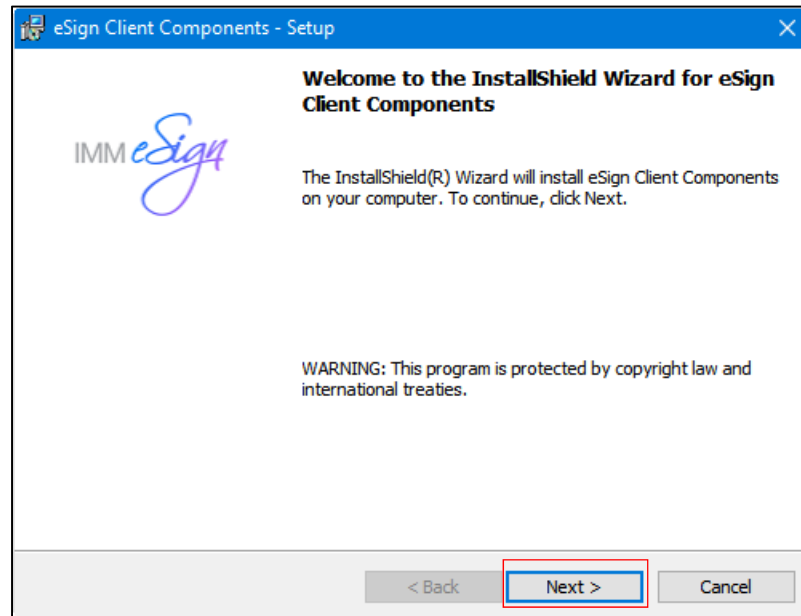
- 5 The **Windows Defender SmartScreen** refreshes.
Click **Run anyway** to continue.



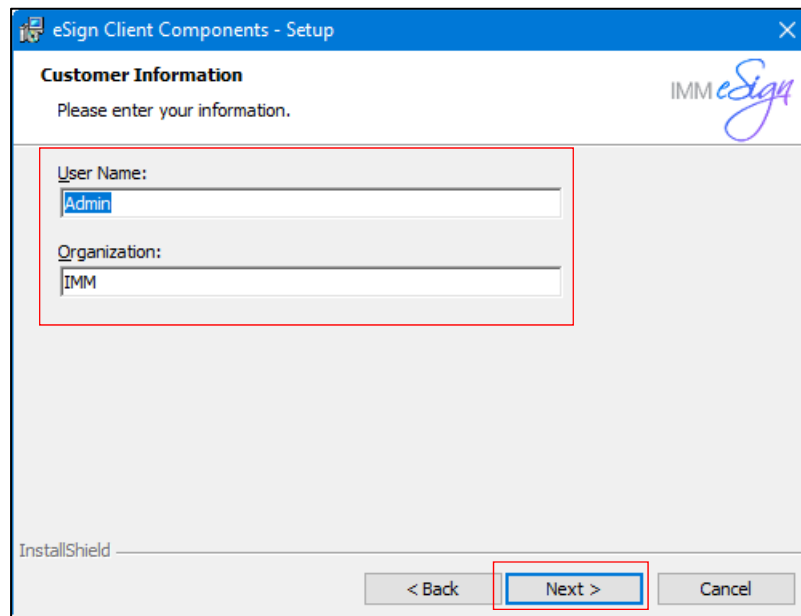
- 6 The Preparing to install window appears.
Do not click Cancel during this portion of the installation.



- 7 The eSign Client Installation Welcome window appears.
Click **Next**.



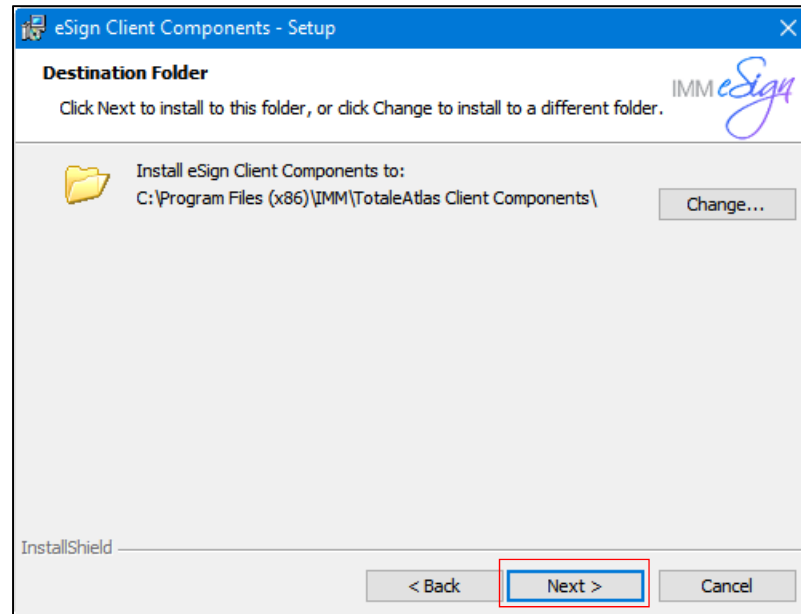
- 8 The Customer Information window appears.
- **User Name:** Enter the User Name.
 - **Company Name:** Enter the Company Name.
- Click **Next**.



9 The Destination Folder window appears.

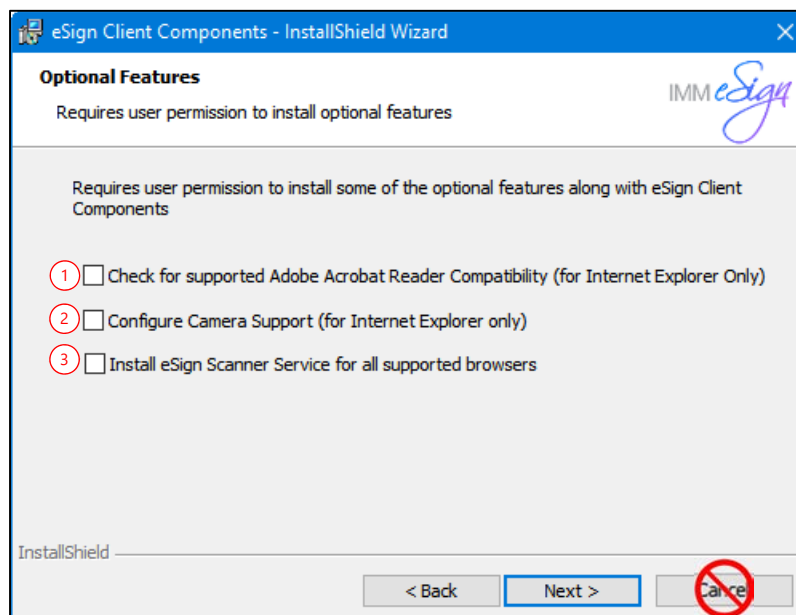
To select a different destination,

- Click **Browse**.
- The Change Current Destination Folder window appears.
- Navigate to and select the *new destination directory*.
- Click **OK**.



Click **Next**.

10 The Optional Features window appears.

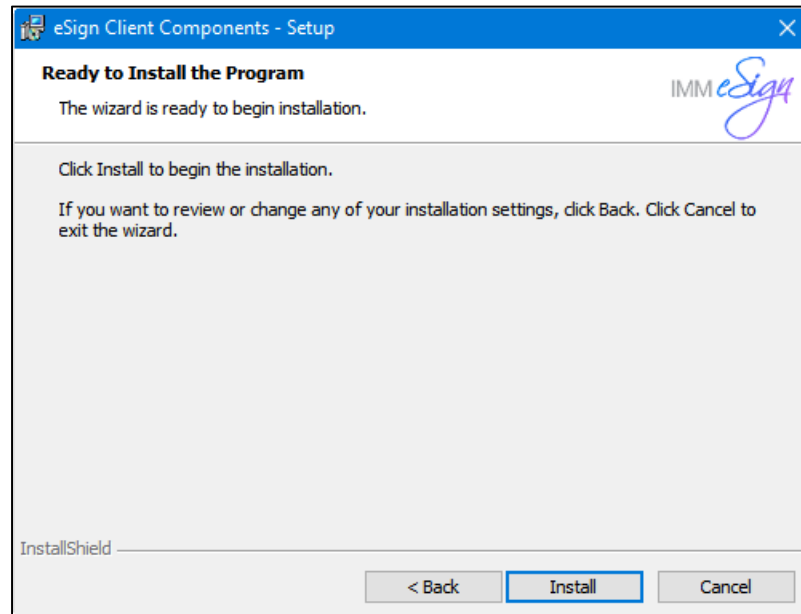


Choose installation options for your client machine:

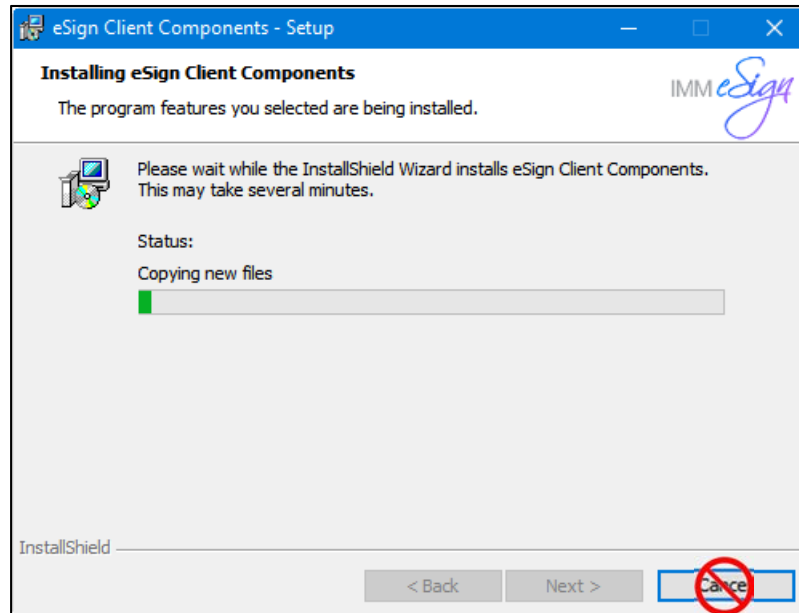
- 1 Check for supported Adobe Acrobat Reader Compatibility (for Internet Explorer Only):** When selected, installation will verify a supported version of Adobe Acrobat Reader is installed on the client machine.
- 2 Configure Camera Support (for Internet Explorer Only):** When selected, internal settings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

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

- 11** The Ready to Install the Program window appears.
Click **Install**.



- 12** The Setup Status window appears.
Do not click Cancel during this portion of the installation.



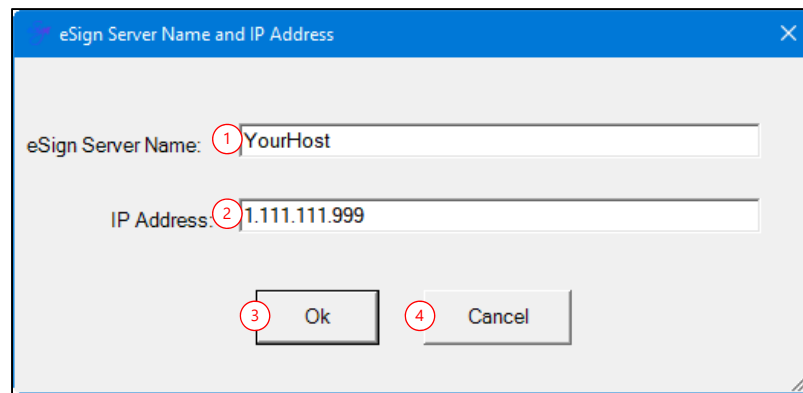
13 **Optional** - This window may not appear for your installation.

This setting is for camera connections, which is used during the signing experience.

If Configure Camera Support in the Optional Features (step 10, page 10) was *selected*, the eSign Server Name and IP Address window appears. If the feature was *not selected*, continue to the next step.

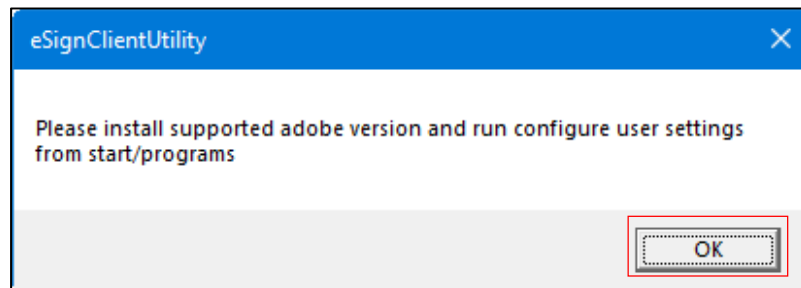
Complete the following:

- 1 **Host Name:** URL to the IMM eSign server. (ex. YourHost or YourHost.YourDomain.com)
- 2 **Host Name:** IP address for Host Name above.
- 3 Click **OK** to continue.
- 4 Click **Cancel** if a camera will not be used with this client installation.



14 **Optional** - This window may not appear for your installation.

If Check for supported Adobe Acrobat Reader Compatibility in the Optional Features (step 10, page 10) was *selected*, and a supported Adobe product is not currently installed, this window will appear. If the feature was *not selected*, continue to the next step.



After eSign Client installation is complete,

Install a supported Adobe product.

Run [Adobe Settings / Configure User Settings](#) on page 19.

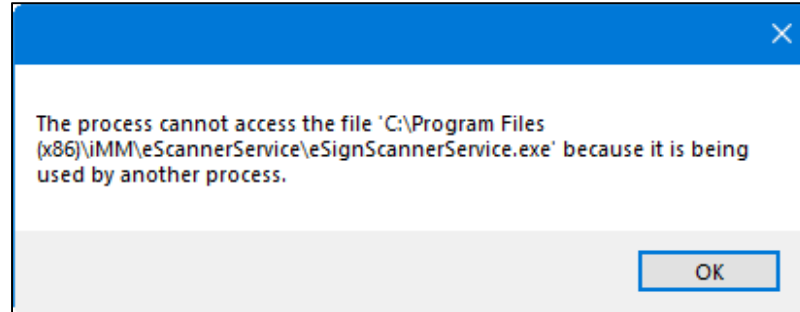
- 15** If the eSign Scanner feature was selected in **Step 10, Optional Features**, the eSign Scanner Installer window appears.

The eSign Scanner Installer window appears.

If you are *not using a scanner*,

Close this window and continue with **Step 19** on page 16.

If the *scanner portion has already been installed*, this popup will display.



Click **OK** to close the popup.

Close the Settings - eSign Scanner window.

Continue with **Step 19** on page 16.

If you are *installing a scanner*,

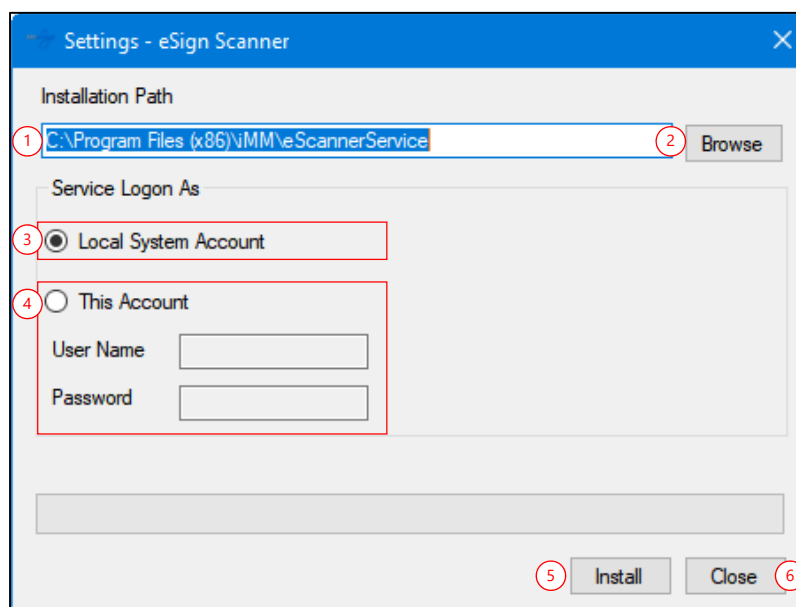
Continue with **Step 16** on page 14.

16 The Settings – eSign Scanner window appears.

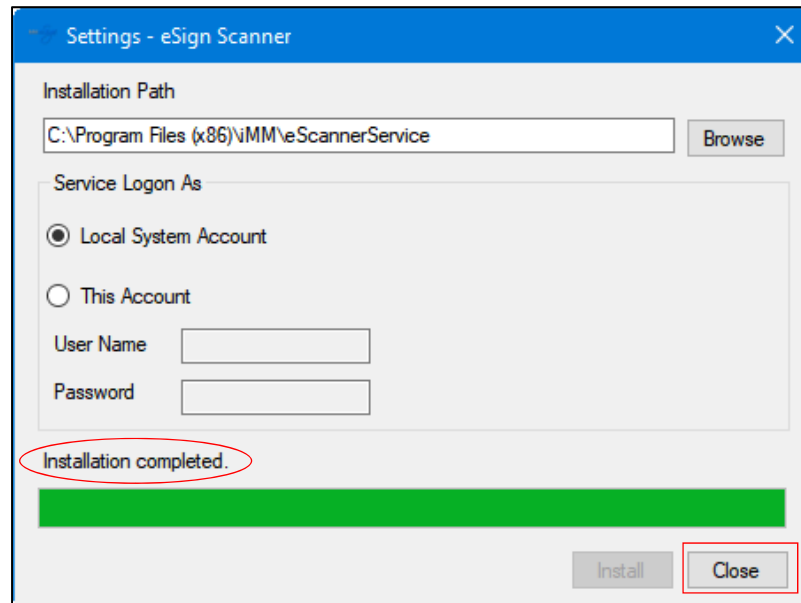
- 1 **Installation Path:** The default installation path on the client machine.
- 2 **Browse:** Select a different installation path.
- 3 **Logon as Local System Account:** *This is the preferred method.* When checked, the Local System Account will be used for this step. When not checked, a **User Name** 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.

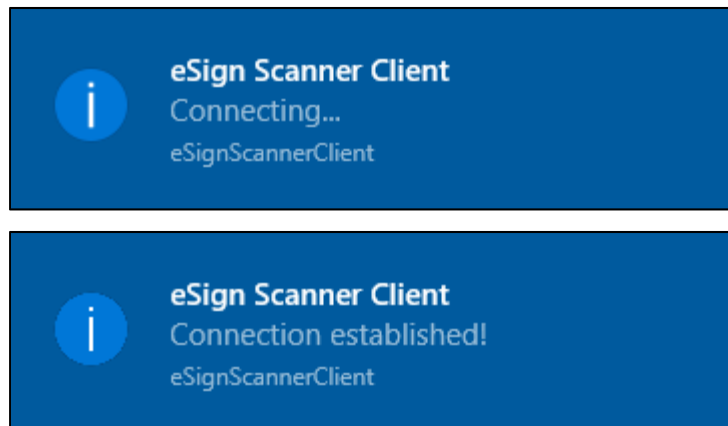
- 6 Clicking **Close** at this point will bypass the eSign Scanner installation.



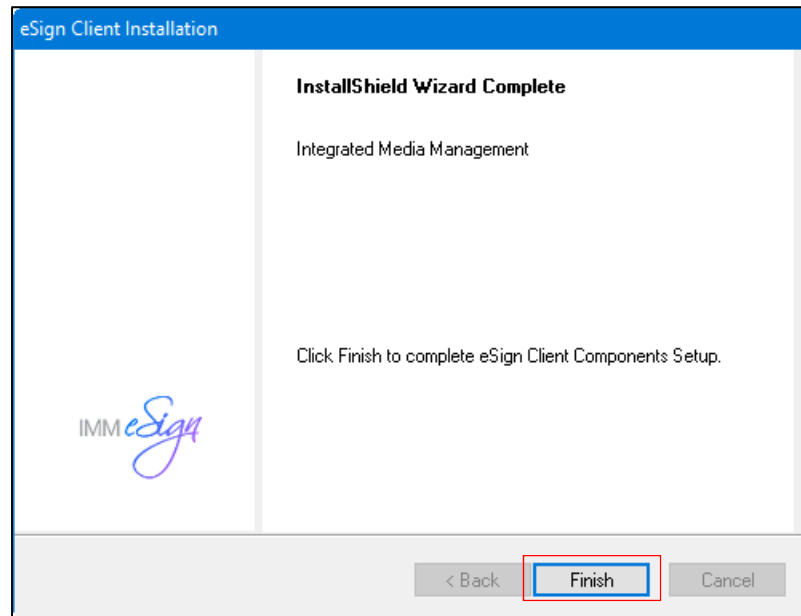
- 17** The installation process takes several minutes.
After Installation Completed appears,
Click **Close**.



- 18** Two Scanner Client Notifications display during installation.



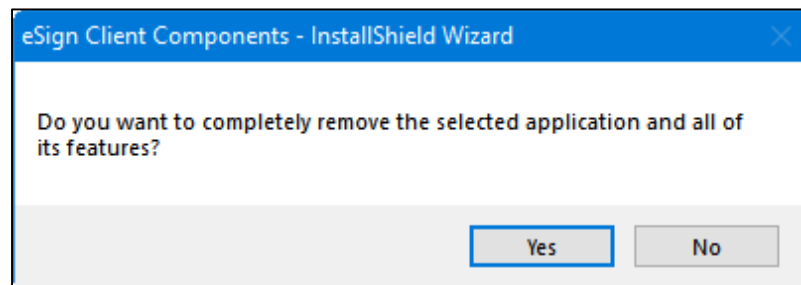
- 19** The InstallShield Wizard Complete window appears.
Click **Finish**.
The eSign Client Components are installed.



- 20** After the Client Components installation has completed, set Internet Explorer as the default browser, as necessary.
- 21** Continue to **Post-Installation Settings** on page 19.

eSign Client Components Uninstallation

- 1** When eSign Client Components are uninstalled, you will be prompted to confirm.



Click **Yes**.

eSign Client Components Silent Installation

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.



Command line parameters in brackets ([]) are optional. (Example: [/norestart])

Some command line parameters are only functional during an upgrade.

eSign 2020.1 Client Components Components Silent Installation

1. On the client machine, click **Start > Programs > Accessories**.
2. Right-click **Command Prompt**.
3. Select **Run as Administrator**.
4. In the Command Prompt window, navigate to the Client Installation folder.
5. From the command prompt, type

```
msiexec.exe /i "[InstallPathFolder]\eSign Client  
Components.msi" /qn TEAHOSTNAME="YourHostName"  
TEAHOSTIPADDRESS="9.999.999.999"
```

Where *YourHostName* is your ServerName.



The command line syntax is the same for fresh installations and upgrades.

Post-Installation Settings

Browser Support

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

Adobe Settings / Configure User Settings

If Adobe Reader/Professional is installed or upgraded after installing or upgrading eSign Client Components this procedure must be performed. This procedure is required only if Internet Explorer is the browser used by the client machine.

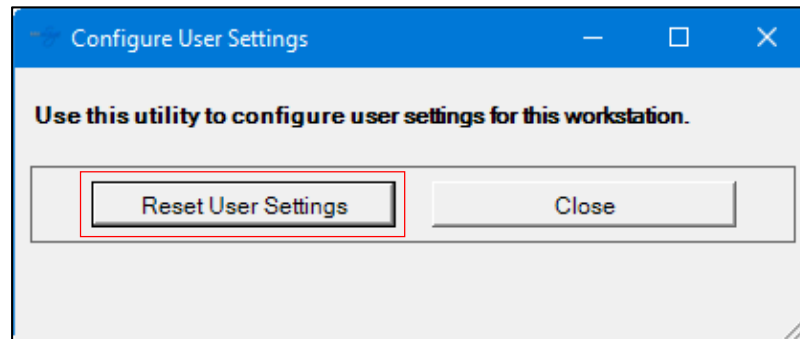


Supported Adobe versions are listed in the Adobe Compatibility Chart.




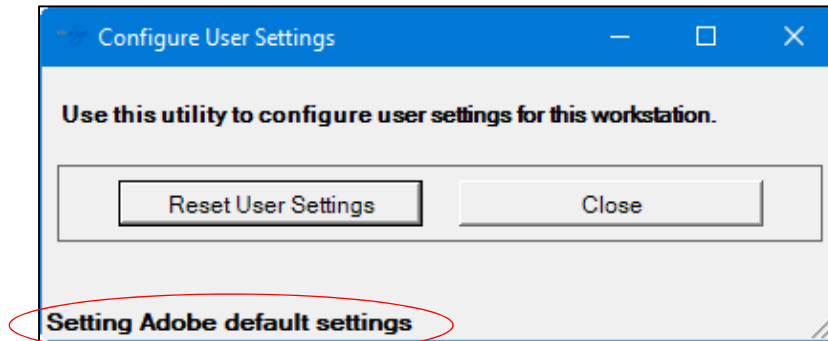
Please ensure all Adobe related windows are closed before performing this procedure.

- 1 Click **Start > IMM > Install or Repair Client Components**.
- 2 In some environments the user may be prompted for Admin credentials.
- 3 The Configure User Settings screen appears.
Click **Reset User Settings**.



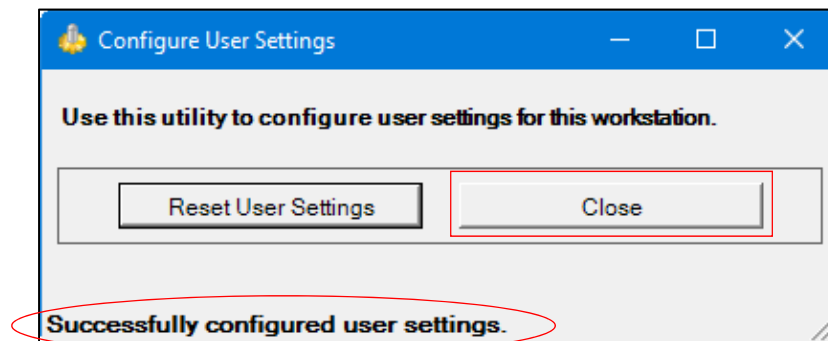
- 4 The Configure User Settings screen updates with this message:
Setting IMM Adobe default settings.

 Refer to **Settings Performed** on page 21 for a listing of the settings changes.



Do not click Close at this point.

- 5 The Configure User Settings window updates with this message.
Successfully repaired client components.



Click **Close** to complete.

Settings Performed

When the 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	Clear
Commenting	Create new pop-ups aligned to the edge of the document	Clear
General	Show splash screen (This setting is not available in all versions of Adobe Reader.)	Clear
Accessibility	Use document structure for tab order when no explicit tab order is specified	Clear
Internet	Display in Read Mode by Default	Clear
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 during Client Components Installation and when the Adobe Settings / Configure User Settings (page 19) is run.

Contact Support

Feel free to contact us with any issues or concerns.

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

Fax: 908.862.6446

Email: support@immonline.com



2 City Hall Plaza
Rahway, NJ 07065