



User Manual

pDoc Signer

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Introduction

pDoc Signer and the companion application pDoc Forms designer provides professional forms design and signing tools for users of Topaz signature pads.

- pDoc Signer is supported for Windows 10 and higher.
- 30 MB free space on the hard drive.
- Before installing a new version of pDoc Signer, uninstall any older versions of pDoc Signer on your machine.

pDoc Signer

pDoc Signer is designed for end users that fill out and sign electronic forms. pDoc Signer also provides features including adding comments, pencil markups, and attachments. If required, pDoc Signer can insert additional signatures using the Insert & Sign feature.

pDoc Forms Designer

pDoc Forms Designer is used by form authors to drag-and-drop form fields such as Text Boxes, Check Boxes, Radio Buttons, List Boxes, Combo Boxes and Electronic Signature fields into electronic documents for use by pDoc Signer.

Installation

SigPlus Install

pDoc Signer requires Topaz SigPlus Pro software to provide communication between the computer and the signature pad. Visit www.sigpluspro.com to download.



pDoc Signer Install

Install pDoc Signer software by running the pDoc Signer installation file found at: www.topazsystems.com/pdocsigner.html. During installation of pDoc Signer, an option screen for installing pDoc Forms Designer will be provided. Install pDoc Forms Designer if you wish to also create PDF forms for users to sign.

After installing, both programs can be found under: "Start → Programs → pDoc Signer".

pDoc Signer Un-Install

To uninstall pDoc Signer, go to "Control Panel → All Control Panel Items → Programs and Features". Select pDoc Signer and click "Uninstall". Follow the instructions to uninstall the software.

Basic Operation

Please note: pDoc Signer only allows one document to be opened at a time.

Page Zooming

The default zoom percentage used when opening any document in pDoc Signer is configurable. To set the default zoom, go to "Tools → Settings" and then select the "Default Zoom Level" in the "Zoom" tab. This setting will be applied when you close the pDoc Signer application and re-open it.

Setting Font Options

To set font options for the entries displayed in form fields and comments, go to "Tools → Preferences".

Opening Certified PDF Documents

Certified PDF documents can be opened in pDoc Signer. Enabling/disabling of features/fields and signing existing signature fields will depend on the permissions set during the certification of the PDF.



Cropped PDFs

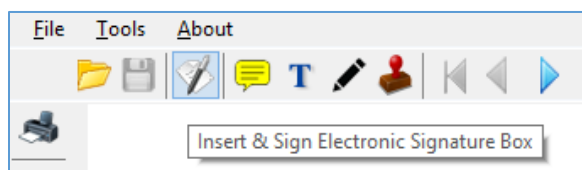
pDoc Signer supports cropped PDF documents. Existing signature fields can be signed, form fields can be filled and other features like text annotations, sticky note annotations, pencil markups, and affixing stamps can be used with cropped PDFs. If the cropped PDF document is a secured document, enabling and disabling of features will depend on the permissions on the document.

Filling Form Fields

When a PDF containing form fields is opened in pDoc Signer, pDoc Signer displays the form fields that are available and supported: Electronic Signature Box, Text Box, Radio Button, Check Box, and List and Combo Boxes. Any other types of form fields present in the PDF are not displayed in pDoc Signer.

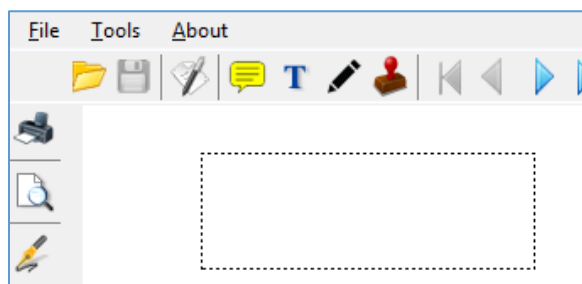
Electronic Signatures

pDoc Signer allows inserting an electronic signature field and signing it immediately using the “Insert & Sign” toolbar icon. This toolbar icon is displayed by default.



Insert and Sign

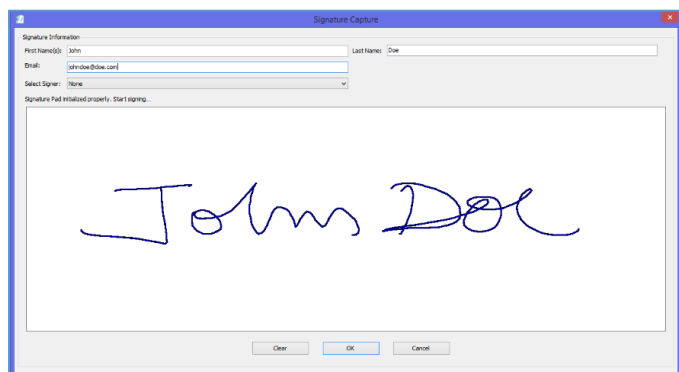
Select the “Insert and Sign” icon on the toolbar; drag the mouse on the document to the required size and location of the signature field. Upon completion of the selection, the signature field is displayed and the act-of-signing is initiated.





Signature Capture Process

During the signature capture process, additional information like First Name, Last Name and Email can be input, or a pre-created signer can be selected. The signer can sign and clear if dissatisfied with the signature, and sign again. Clicking “OK” accepts the signature and embeds it in the document.



Validation of Signatures

Validation is the process of checking if the document has been modified since it was signed and verifying that a valid signing certificate was used and is trusted. By default, signatures are validated when you open a PDF in pDoc Signer. An icon appears in the signature field on the document page to indicate the signature status.



The *digital signature icon* along with the name of the field in the Signatures panel indicates the presence of an unsigned signature field.



The *check mark icon* indicates that the signature has been validated.



The *red X icon* indicates that the signature is not currently validated.



The *caution triangle icon* indicates that the document appears to have been modified after the signature was added.

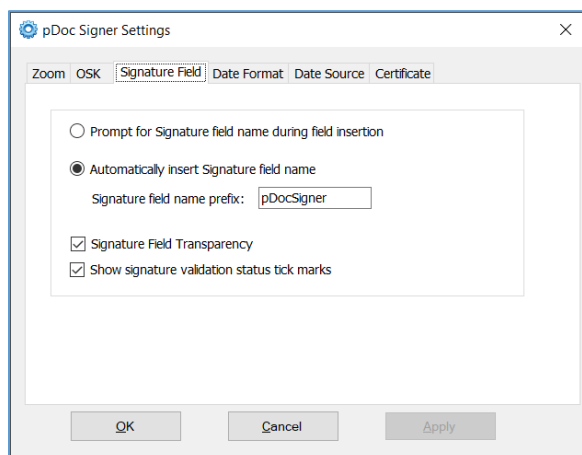


The *question mark icon* indicates that pDoc Signer is not able to validate the signature. This can show if the document was signed by a valid certificate, but it isn't in the Adobe or users trusted certificate list.

The “Signature Properties” dialog box can be opened either by clicking on the “Status” icon or by right-clicking on the “Signature Field” and then selecting “Validate Signature”.

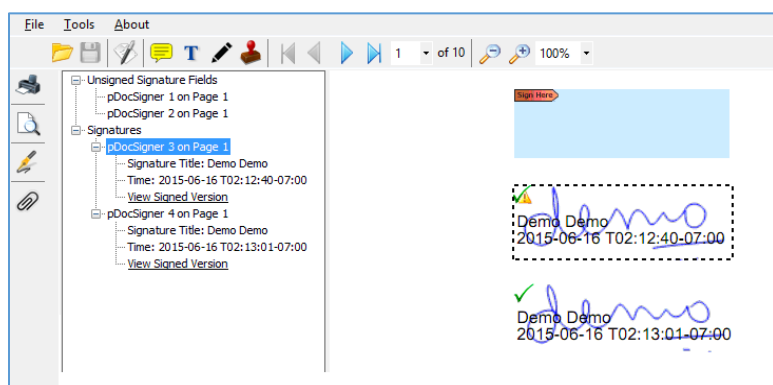


The status icons on the signed signature fields can be turned off by unchecking “Show signature validation status tick marks” in the “Signature Field” tab of the pDoc Signer Settings screen.



View Signed and Unsigned Signature Fields

Click on the “Show/Hide List of Signatures” tool button in the left pane to open the signature panel. Clicking on any of the signature fields in the list causes the corresponding blank or signed signature field in the document to be highlighted. Close the signature panel by clicking again on the “Show/Hide List of Signatures” tool button.

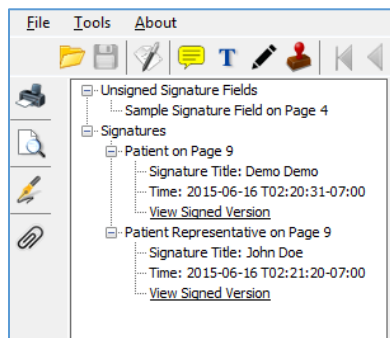




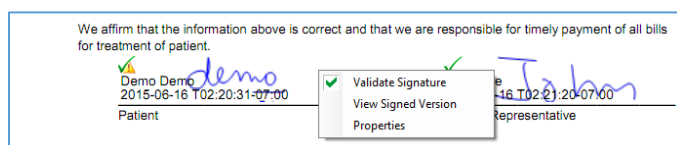
Viewing Previous Signed Document Versions

Each time a document is signed in pDoc Signer, a signed version is saved with the PDF. Each version is saved as append-only so that it cannot be modified. In pDoc Signer, the corresponding signed version of a signature can be viewed using the following two options:

- 1. OPTION ONE:** In the “Signatures” panel, select the signature and click “View Signed Version” available in the details of the signature.

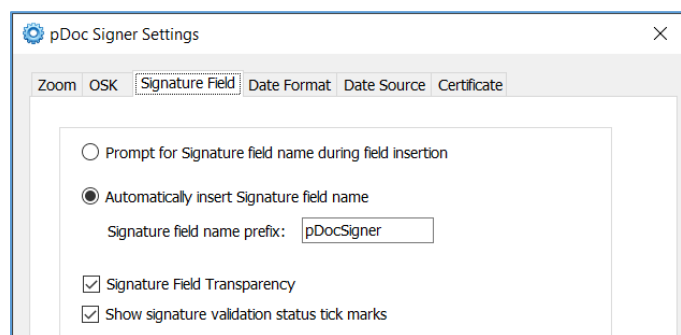


- 2. OPTION TWO:** Right-click on the signed signature field and select “View Signed Version”.



Specifying Signature Field Options

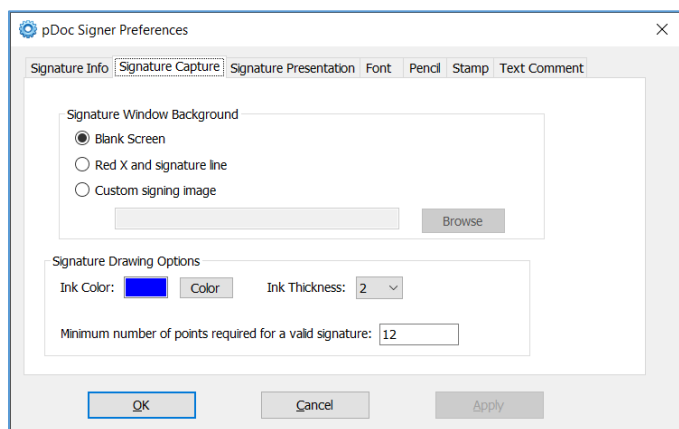
Each signature field must have a name associated with it. pDoc Signer can assign a name automatically when a signature field is inserted into the PDF (if a “Prefix” for “Name” is supplied). Another alternative is to provide a name for the signature field when inserted manually. These options can be set in the “Signature Field” tab under “Tools → Settings”.





Signature Capture Options

To set the signature capture options, go to “Tools → Preferences → Signature Capture”.



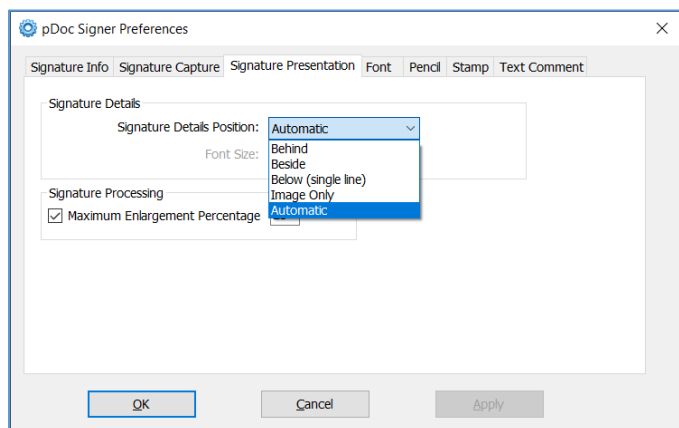
The default signature window background is “blank screen”. For a “custom signing image” background, the user can select a custom bitmap image with resolution less than or equal to 1600x900.

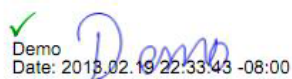
The minimum number of signature points required to accept a signature can be set here, which can be used to help detect and prevent inadvertent pen swipes from being accepted as signatures. This value should be selected based on the sample (point) rate of the signing device being used; the default is 12.

Signature Presentation

To set signature presentation options, go to “Tools → Preferences → Signature Presentation”.

Select the desired position of the signature details (the signer’s name and date/time the signature was accepted).





If "Behind" is selected, the signature details are placed at the center of the signature field with the signature squiggle behind the details.



If "Beside" is selected, the signature squiggle is shown on the left side of the field and the details are shown on the right side of the signature field.



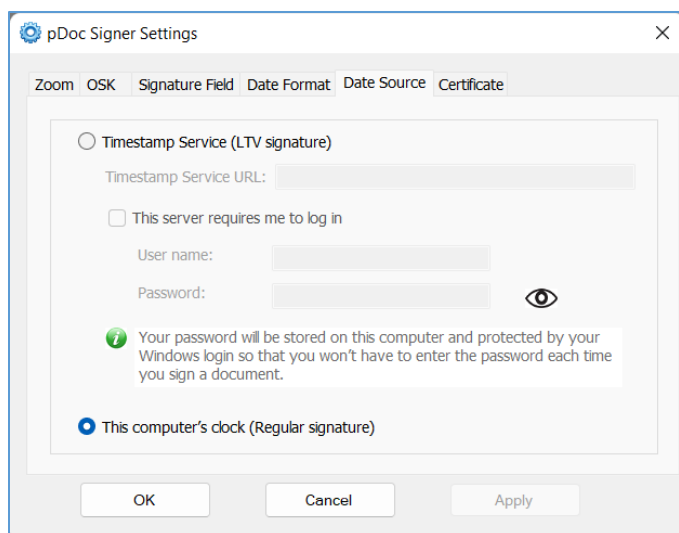
If "Image Only" is selected, only the signature squiggle is shown in the Signature Field and details are not shown.

The Maximum enlargement feature and percentage can be specified in this menu, preventing the signature from looking pixelated or jagged. The value of the maximum enlargement percentage can be between 0 and 100. If a value of 0 is specified, the signature is not enlarged at all. If a value of 100 is specified, the signature is enlarged to fit the complete destination.

Note: The display of Signature Title and the time/date stamp is on by default and non-removable for "Behind" and "Beside" options. But, if the height of the signature field is less than 30 pixels or the width of the signature field is less than 50 pixels, then the signature details (i.e., Signature Title and Date/time stamp) are not printed on the signature.

Date Source Selection

pDoc Signer provides the capability to select the date/time source to apply to signatures from either a standard internet TSA service (Time Stamp Authority) or the computer's clock.



Regular signatures using the date/time from the computer's clock are the default option; however, the user has the option to select Long Term Validation (LTV) signatures, which use an internet TSA service as the source for the date/time. Instead of using the standard TSA service, the user can also specify a specific TSA URL and optionally provide the username/password log in information for the URL.



Signature Information

- 1. Creation of List of Signers:** This feature can be used to create a list of expected signers. To create a profile, enter the required information and then click "Add". A maximum of 10 profiles can be created here for use while signing. To make a signer the default signer, select the signer from the available list, and then click "OK".
- 2. Remove a Signer:** To remove a signer from the list, select the signer from the available list and click "Remove".

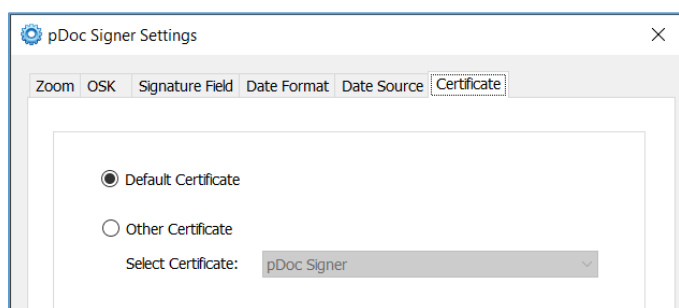
Automatic Configuration of Certificate

pDoc Signer provides a default certificate for signing. The default certificate (i.e., pdocsignerTopaz.pfx) will be configured automatically during the installation process. If a user wants to specify their own certificate to be the default signing certificate, they can enter the certificate thumbprint during installation. When pDoc Signer is opened, this certificate is selected as default in the "Other Certificate" option in the "Certificate" tab under "Tools → Settings". If a user wants to change the certificate after starting pDoc Signer, the user selects the certificate in the "Other Certificate" option as shown below in the "Certificate Selection" section.

Certificate Selection

Signing in pDoc Signer requires the use of a digital certificate. During the standard installation process, pDoc Signer automatically installs and configures the default certificate that is used for signing. This default certificate expires on May 26, 2046.

Alternatively, the certificate used in previous versions of the software can be selected. This other certificate (named "pDoc Signer") has a shorter expiration interval. Additional certificates in the drop-down list, installed by the users or their representatives, may be selected if desired.

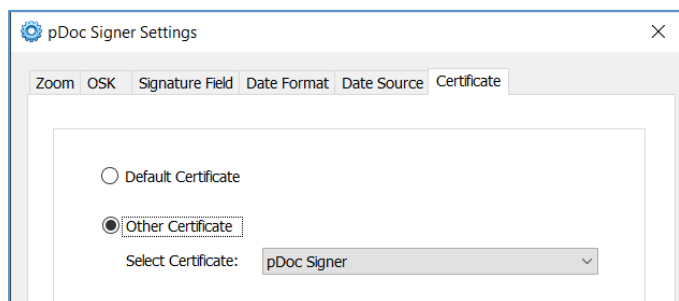


Users have the option to select a different signing certificate from a list of certificates already installed in the PC. To select another certificate for signing, go to the "Certificate" tab under "Tools → Settings" and select "Other Certificate" in the Certificate tab. Beneath "Other Certificate" is a drop-down list of certificates that are already installed in the PC's Windows certificate store and have a private key available for signing; this includes external USB crypto tokens.



The first certificate in the Other Certificate list is named pDoc Signer, which is the certificate used in the previous version of the pDoc Signer software package. Once a certificate has expired, it may no longer be used to assist in the signing process, or to validate previously signed documents.

Additional certificates in the drop-down list, installed by the users or their representatives, may represent the user's organization.



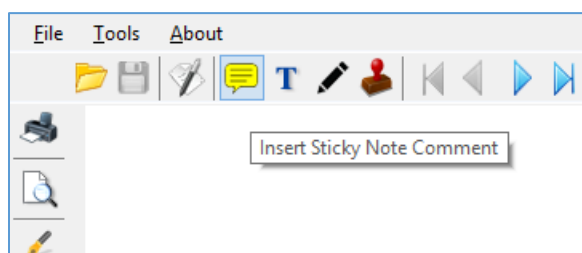
If one of the other certificates has been selected when the pDoc Signer application is opened, the application checks the certificate expiration date as follows:

- If the number of days to expiration is equal to or less than 40 days, then the application will display a warning message.
- If the certificate has expired, then the application will display a certificate expired message and change the certificate option to "Default Certificate". If desired, the user can select another certificate from the "Other Certificate" drop-down list.

Sticky Note Comments

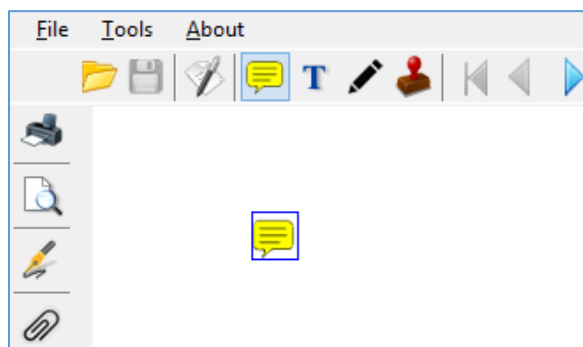
Adding Sticky Note Comments

Click on the "Sticky Note Comment" tool button. Click on the document where the sticky note comment field is required. A window is displayed wherein the user can add the text for the comment.



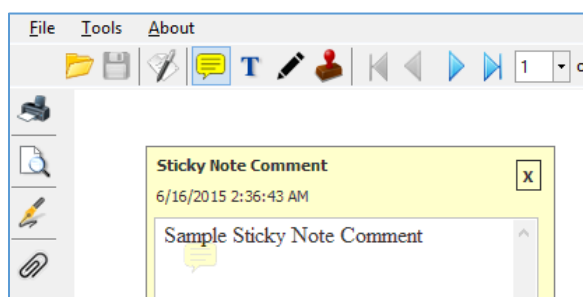


Upon acceptance, a sticky note comment icon will be displayed on the document at the specified location which indicates that the sticky note comment field is added in that position.



Viewing Sticky Note Comments

Double-click on any sticky note comment icon on the document to view the corresponding notes in a separate transparent window.



Deleting Sticky Note Comments

To delete a “Sticky Note Comment”, select the comment, right-click, and select “Delete”.

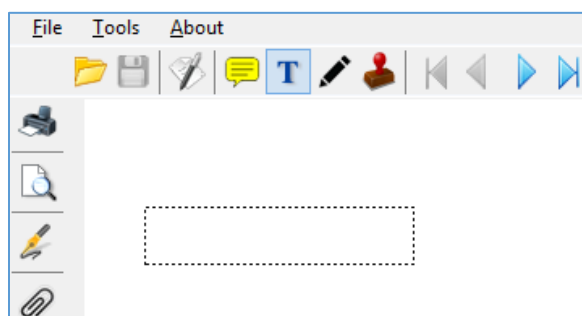
Note: You cannot delete a sticky note comment if the PDF document contains at least one signed signature field or if the PDF is secured. These sticky notes become an integral part of the signed and/or secured document.



Text Comments

Adding Text Comments

Click on the “Text Comment” tool button. Drag the mouse on the document to the required size and location of the text comments field. Upon completion of the selection, the text comments input window is displayed.



Using the keyboard, enter the text for the comment. Font attributes specified in the “Preferences” windows for comments are applied for the text entered in this window. Click on the “Add” button to add the text comment to the PDF.



Note: Text lines that are longer than the width of the text field are truncated by standard convention; they do not wrap to the next line, so the user should use line returns for multi-line comments.



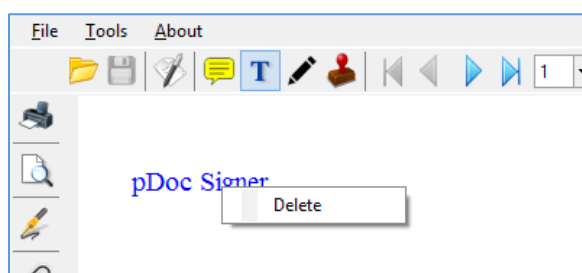
Updating Text Comments

The existing text comments can be updated in pDoc Signer. Click on the text comment and alter the text as required. The updated text is applied to the text comment when the PDF is saved.

Note: Text comments in place when the document is signed will not be editable after signing; after a document is signed, new text comments can be added, but they cannot be modified after addition.

Deleting Text Comments

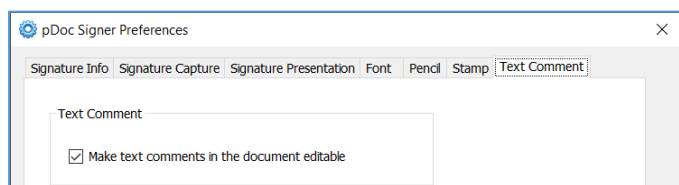
To delete a text comment, select the comment, right-click on it, and select “Delete”.



Note: Text comments can't be deleted if the PDF document contains at least one signed signature field or if the PDF is secured.

Editing Text Comments

To make text comments editable, go to “Tools → Preferences”. Click on the “Text Comment” tab, select “Make text comments in the document editable”, and click on “Apply”.



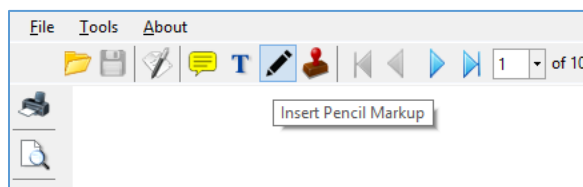
This option is applicable for existing text comments that are there when the document is opened, as well as for new text comments that you insert during the session. If you insert new comments, they immediately become editable or non-editable depending upon the settings.



Pencil Tool

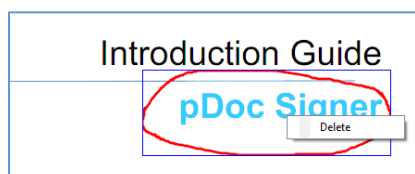
Draw Pencil Mark-Up

Click on the pencil tool. Drag where you want to begin drawing and release the mouse button where the pencil line should end.



Delete Pencil Mark-Up

To delete a Pencil Markup, select the markup, right-click, and select “Delete”.



Pencil Tool Settings

To specify the line width and line color for pencil markups, go to “Tools → Preferences”. Click on the ‘Pencil’ tab, select the pencil line color and width, and click “Apply”.

Attachments

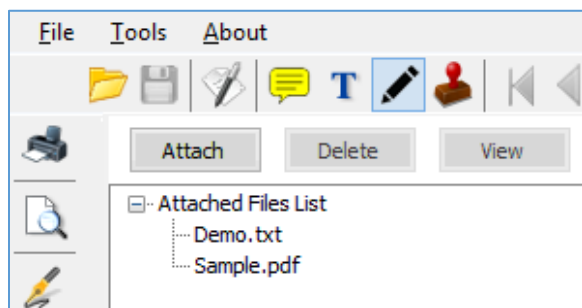
PDF documents and other types of files can be attached to a PDF using pDoc Signer. If you move the PDF to a new location, the attachments move with it.

Click on the “Attachments” tool button in the left pane to open the “Attachments” panel.



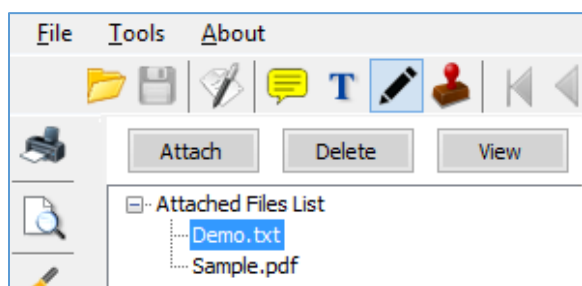
Adding Attachments

Clicking on “Attach” will open a file dialog. Select the file to be attached to the PDF document and click “OK”. The selected file will be attached to the document and the attached file list will be updated.



Deleting Attachments

Select the attachment to be deleted from the list. Click “Delete” in the “Attachments” panel. The selected file will be deleted, and the attached files list will be updated.



Note: Attached files cannot be deleted if the PDF document contains at least one signed signature field or if the PDF is secured.

Viewing Attachments

To view an existing attachment, select the attachment and click “View” in the “Attachments” panel. If the attachment is a PDF, it is opened in another instance of pDoc Signer. For other types of attachments, the attachment is opened in their respective application.



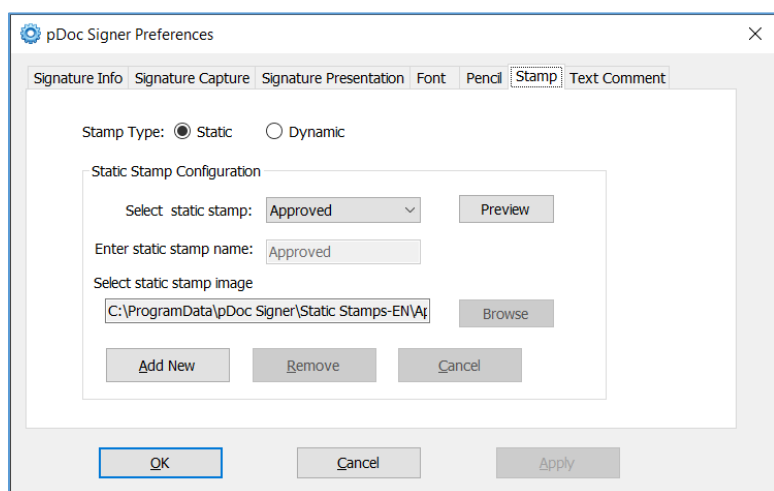
Stamps

pDoc Signer supports insertion of stamps in a PDF document. A stamp can be either static or dynamic.

Configuring Stamps

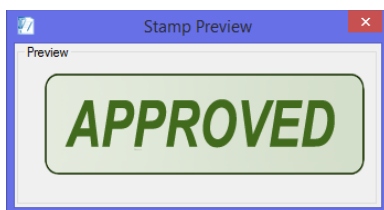
To select the stamps that can be placed into a document:

1. Go to “Tools → Preferences”; the “pDoc Signer Preferences” window will open.
2. Click on the “Stamp” tab; the “Stamp Information” window will appear.
3. Select the “Stamp Type”, either Static or Dynamic. The default is Static.
4. Configure the list of stamps as described in the following sections.
5. Click “OK”; the window will close.



Static Stamps

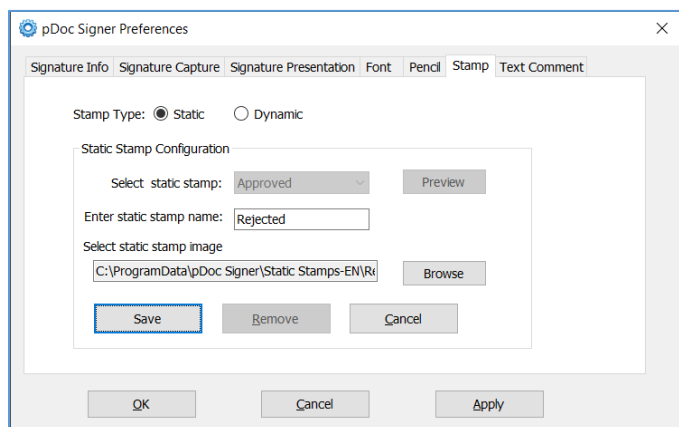
By default, pDoc Signer supports one static stamp named “Approved”. You can preview any stamp by clicking the “Preview” button.





To add a new static stamp:

1. Click on “Add New”, and enter a name for the static stamp.
3. Click “Browse” and select the image containing the static stamp.
4. Click “Save”.



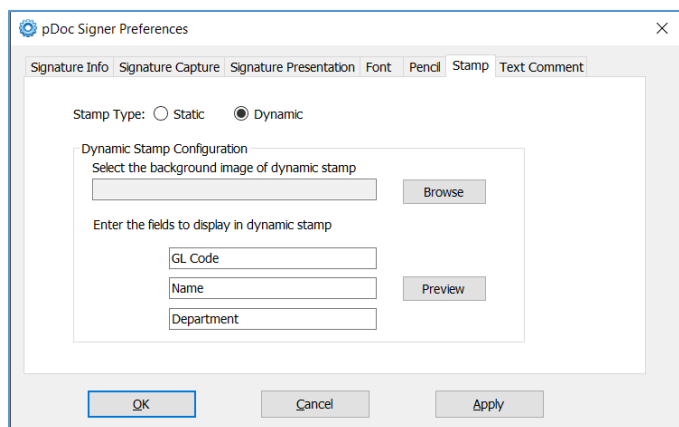
Note: The maximum size allowed for the static stamp images is 600 x 600 pixels.

To remove an existing static stamp:

1. Select the stamp in the list of stamps.
2. Click “Remove”.
3. Click “Yes” in the confirmation message.

Dynamic Stamps

To specify the usage of the dynamic stamp feature, select the “Stamp Type” as “Dynamic”.





The dynamic stamp configuration contains the following steps:

1. Select the background image of the dynamic stamp. The maximum size allowed for the background image is 600 x 600 pixels. If a background image is not specified, then the default white background image (400 x 200 pixels) is used.
2. Specify the names for the fields to display in the dynamic stamp. Information for these fields will be collected during the insertion of the stamp into the PDF document. The default names for the fields are "GL Code", "Name", and "Department".
3. To see the preview of the configured dynamic stamp, click "Preview".

Dynamic Stamp

GL Code: NM002

Name: John Doe

Department: Marketing

OK Cancel

Note: The Dynamic Stamp should have either a background image or information in at least one of the fields.

Inserting a Stamp

To insert the stamp into a document:

1. Open the document to the page where the stamp should be inserted.
2. Click on the stamp icon in the tool bar; the cursor will take the shape of the stamp icon.
3. Move the cursor to the location where the upper left corner of the stamp is to be inserted. Left click on that position.

If a static stamp is selected and there is only one static stamp, pDoc Signer places the stamp at that location. If a static stamp is selected and more than one static stamp exists, pDoc Signer displays a window prompting the signer to select the static stamp to be used as shown below.

Static Stamp

Select static stamp: Approved

Approved

Rejected

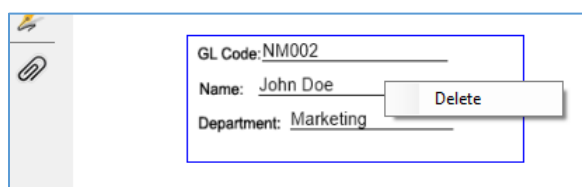
OK Cancel



If a dynamic stamp is selected pDoc Signer opens a window with text boxes. The labels besides the text boxes (e.g., GL Code, Name, and Department) are specified in the “Preferences” window. Fill in the text boxes and click “OK” to place the stamp at that location.

Deleting a Stamp

To delete a stamp from a document, right-click on the stamp and click “Delete”.



Note: The stamp can't be deleted if the PDF document contains at least one signed signature field or if the PDF is secured.

Securing Documents

pDoc Signer can be used to secure an unsecured and unsigned PDF. To secure a document, go to “File → Secure Document”. Provide either “Permissions Password” or both “Open Password” and “Permissions Password”. “Permissions Password” is mandatory.



Open Password: Password required to open the document.

Permissions Password: Required if permissions on the document need to be modified at a later point of time in other PDF containers. Permissions password once provided cannot be changed in pDoc Signer.

Printing Allowed: “None”, “Allow Printing”, or “Changes Allowed”. If the user selects the “None” option in the printing allowed, the secured documents are not allowed to print.



Opening Secured Documents

If an “Open Password” is set, the password must be provided to open the document. Features of pDoc Signer are enabled or disabled based on the permissions set while securing the PDF. If the document being opened has only the “Permissions Password”, the password dialog is not displayed, but features of pDoc Signer are enabled or disabled based on the permissions set while securing the PDF.

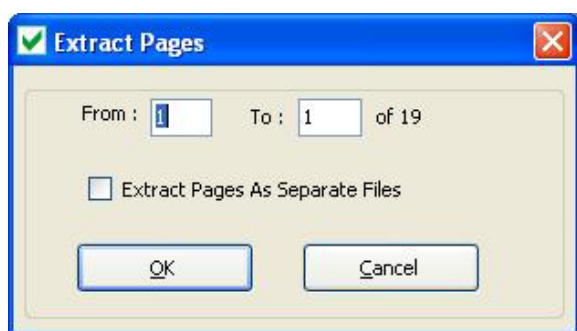
Printing and Print Preview

To print the opened PDF document from pDoc Signer, click on “Print” tool in the vertical toolbar, or go to “File → Print”. To view the appearance of the printed document before printing it, select “Print Preview”. In the vertical toolbar, or go to “File → Print Preview”.

Merging and Splitting of PDF Documents

Extract Pages

To extract (copy) pages from the opened PDF document, go to “Tools → Manipulate Pages → Extract Pages”. In the “Extract Pages” window, select the page range (i.e., starting page to ending page) and click “OK”. A dialog prompting the user to select the folder where the new PDF should be created is displayed.



Once the folder is specified, the selected pages will be embedded into a new PDF with the same name as the original PDF and a suffix “_Extract”. If the option “Extract Pages as Separate Files” is selected, each individual page is exported into a new PDF document, and the page number is appended to the file name for each page in the document.

Note: All signature fields (both unsigned and signed) existing in the page are removed from the page during the extraction process. Signature fields should be inserted again, if required.

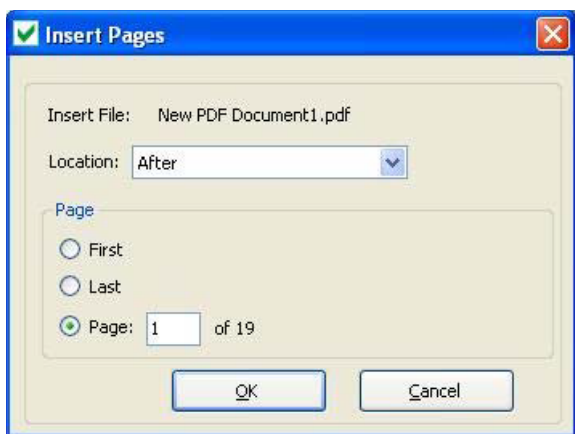


Delete Pages

To delete pages from the opened PDF document, go to “Tools → Manipulate Pages → Delete Pages”. In the “Delete Pages” dialog, select the page range (i.e., starting page to ending page) and click “OK”. Upon clicking “OK”, the selected pages will be permanently deleted from the opened PDF.

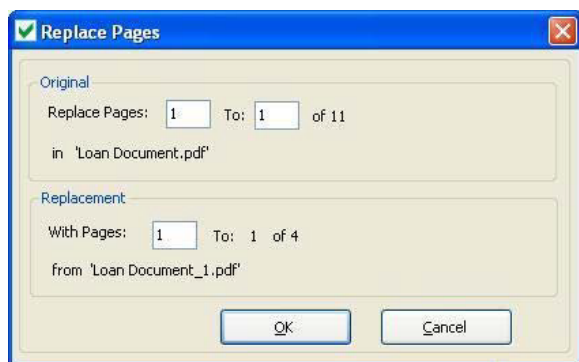
Insert Pages

To insert pages into the opened PDF document, go to “Tools → Manipulate Pages → Insert Pages”. Select the PDF file containing the pages to be inserted. The “Insert Pages” dialog will be opened; select the location at which the page will be inserted (before or after). Then, select the page number at which the pages will be inserted. The selected PDF pages will be inserted in the specified location.



Replace Pages

To replace the pages in the opened PDF document with the selected pages from another PDF document, go to “Tools → Manipulate Pages → Replace Pages”. Select the document that contains the replacement pages and click “Open”. Once the document containing the replacement pages is selected, the “Replace Pages” dialog will be opened.



In the “Replace Pages” dialog, under “Original”, specify the pages to be replaced. Under “Replacement”, specify the beginning page.

Command Line Arguments

pDoc Signer can also be invoked from the command prompt or from other applications by running the pDoc Signer executable located in the pDoc Signer installation folder. The pDoc Signer application accepts “FilePath” as a command line argument. Any third-party application that wants to invoke pDoc Signer can run the pDoc Signer executable using the Windows API and provide the path of the file to be opened as a command line argument. For example, clicking on “Start → Run”, and then running the command “C:\Program Files\pDoc Signer\pDoc Signer.exe” “C:\Sample.pdf” runs the pDoc Signer application and opens “C:\Sample.pdf” automatically. The above command assumes that pDoc Signer is installed in the “C:\Program Files\pDoc Signer” folder. This feature is particularly useful for custom third-party applications to invoke pDoc Signer from their application.

Hotkey Facility for Toolbar Icons

pDoc Signer provides hotkeys for the following icons on the toolbar:

1. Electronic Signature – Ctrl + E
2. Sticky Note Comments – Ctrl + C
3. Text Comments – Ctrl + T
4. Pencil Tool – Ctrl + P
5. Stamp – Ctrl + S



Making pDoc Signer the Default PDF Program

1. Right-click on a PDF document icon and select "Open With".
2. Click on "Choose Default Program...". An "Open With" window will open.
3. Click "Choose another app" and check "Always use this app to open PDF file".
4. Click "pDoc Signer" and "Open".

If pDoc Signer is not shown as an option in the "Choose another app" menu, click "Look for another app for this PC", then continue below:

1. Click C:\ drive or local disk and double-click "Program Files" or "Program Files (x86)".
5. Double-click "pDoc Signer".
6. Click "pDoc Signer.exe" and "Open".
7. The "Open With" window will disappear, and pDoc Signer will open displaying the document.

After this, when you double click on a PDF document icon, pDoc Signer will open and display the document.