



# User Manual

## pDoc Pro Client for Android

**Version 3.2**

May 4, 2020

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## 1.0 – The pDoc Pro eSign Software System Overview

### 1.1 – System Description

The Topaz pDoc® Pro eSign Software System provides an electronic signature transaction solution for network environments where a system operator pushes a PDF document from their PC (called the server) to any of a number of client devices (Android tablets, iPads, Windows tablets, or tablet displays) for transaction review and signing. The document can be a PDF form, contract, or other document for the user to sign and optionally to fill in text boxes, check boxes, and radio buttons, and to select items from lists. When the transaction is complete, the client software sends the completed document back to the server where it is stored and available to the operator. The client can then wait until it receives another document for signing.

This system is a scalable “one-to-many” system where one server system can control the concurrent signing of unique transactions on multiple tablet devices. The network connections can be wired or wireless, with the host server and clients on the same network. Android clients are typically connected to the network through Wi-Fi.

In addition, the pDoc® Pro eSign Software System can work as a “many-to-many” e-signature system where multiple servers can push documents to any of a number of clients. The pDoc Pro System manages potential communication conflicts, so that if a client tablet is busy presenting a document for signature to one user, then other servers will see that that client is busy and will not be able to push a document to that client tablet until the current user has completed their signing transaction.

pDoc Pro Client software is unique among signature apps in that every pDoc Pro signature is captured and saved in a unique distinguishable form, unlike other simple approaches which use only signature images or fonts. For valuable electronic transactions that must stand up to scrutiny, pDoc Pro Client’s biometric signatures are the de facto standard for professional applications in business, finance, health care, law, real estate, etc.

## 1.2 – System Components

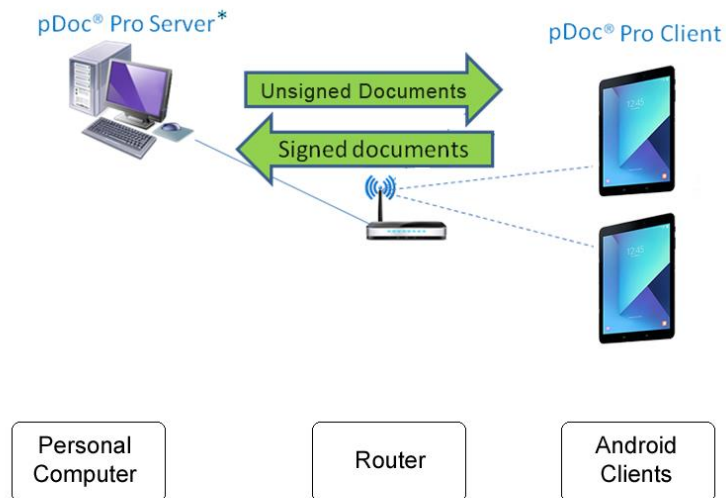
The pDoc Pro eSign Software System comprises:

- One or more pDoc Pro Clients. The two components of a pDoc Pro Client are
  - A client computer or device, which can be an Android tablet, Apple iPad device, a Windows tablet, or a PC with a signature pad or tablet display. This document describes the Android pDoc Pro Client
  - The pDoc Pro Client Software that runs on the client device as a dedicated application
- One or more pDoc Pro Servers. The components of a pDoc Pro Server are
  - A Windows PC
  - The pDoc Pro SDK Server software or the pDoc Pro App Server software. These software packages comprise separate administrator and originator modules

## 1.3 – System Architecture

In the standard configuration shown below, the pDoc Pro Server runs on a desktop PC and pushes unsigned documents to the tablet clients and receives signed documents back from the clients. While this diagram shows only Android clients, a pDoc Pro system may contain Android, Windows, and iOS clients. The network connections can be wired or wireless; the host PC and the clients should be on the same LAN. However, it's common for tablet clients to be connected to the LAN through Wi-Fi and the PC to be connected to the LAN through a wired network interface.

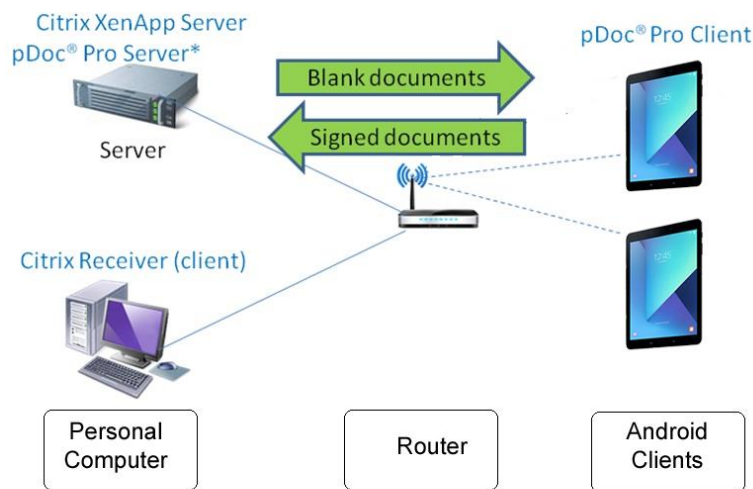
### pDoc Pro eSign Software System Standard Configuration



\* pDoc® Pro Server comprises the Administrator and Originator functions

In the Citrix configuration shown below, the pDoc Pro Server software runs on a Citrix Xen App Server and pushes blank documents to the clients and receives signed documents back from the clients. The person using the server software uses a Citrix client Android/tablet running the Citrix Receiver software, and sees the server software as if it were running on the local PC. Again, the network connections can be wired or wireless; the server, the client PC, and the clients should be on the same LAN. However, it's natural for tablet clients to be connected to the LAN through Wi-Fi and the PC and the server to be connected to the LAN through wired network interfaces.

### pDoc Pro eSign Software System Citrix Configuration



## 1.4 – System Operation

A typical transaction using the pDoc Pro eSign Software System consists of the following steps:

1. Pushing a Blank Document Form from the Server PC to the Client
  - a. The system operator selects a document for the customer to fill in and sign and selects the client device the customer will use to fill in and sign the document
  - b. The system operator clicks the Push Document to Client button, which sends the document to the client
  - c. The server can also send documents to the Android tablet client automatically without operator intervention. See the server user manual for more details.

2. Filling in and Signing the Document on the Client
  - a. Customer uses the pDoc Pro Client Software to fill in form fields and sign the document on the client device
  - b. Customer taps the Done button, which sends the signed document back to the pDoc Pro Server
  
3. Saving the Signed Document on the PC
  - a. The pDoc Pro Server Software receives the signed document from the client, saves it automatically in a specified folder, and indicates on the GUI that the completed document has been received and saved
  - b. The system operator uses the pDoc Pro Server Software to confirm completion of the transaction and receipt of the client from the customer

## 2.0 – pDoc Pro Client Software

The pDoc Pro Client Software is the client software running on both dedicated and non-dedicated pDoc Pro clients. Typically, an Android tablet that will be used by several people in turn operates in dedicated mode, i.e., it is only used for the pDoc Pro Client application. An Android device that is used by one person typically runs the pDoc Pro Client Software in non-dedicated mode, i.e., the user will use the Android device for other functions in addition to the document signing.

Depending on the client usage set when pushing the PDF, the pDoc Pro Client will act as either a Signing client or an Annotating client. Version 2.0 supports form field filling and signing; Version 3.2 supports annotation.

In signing mode, clients can use an on-screen keyboard to fill in form fields and the stylus or their finger to sign digital signature fields in the PDF documents pushed to them. In signing mode, each signature is encrypted and embedded into the PDF document, and a checkpoint snapshot of the document is made, so that changes to the document made after the signature can be tracked. It is the most secure form of digital signing.

There are two major components in the pDoc Pro Client software:

- pDoc Client Screen
- Home Screen

### 2.1 – pDoc Client Screen

If the document received by the client is for signing operation, the pDoc Client Screen allows signing of PDF documents in a legally binding and secure manner. You can embed handwritten signatures into PDF documents using this application. The pDoc Client Screen also allows filling of form fields. The pDoc Client Screen captures handwritten signatures written with a finger or stylus. The pDoc Client Screen captures handwritten biometric signatures. The captured signature is shown in the corresponding signature field in the document and can be viewed and verified in pDoc Signer, or by other PDF document rendering applications like Adobe Acrobat and Reader.

The document can also be received in the annotation mode. Annotation allows you to add information like text comments, drawings, and non-biometric signatures using the pen or your finger.

### 2.2 – Home Screen

The Home Screen runs when the pDoc Pro Client is not serving any signing requests. It displays a default information screen, a customized single page PDF, a rotating sequence of images, or a video.



## 3.0 – Installing pDoc Pro Client Software

### 3.1 – Before You Begin

- pDoc Pro Client Software runs on an Android Tablet
- Make sure you have the Android OS 5 or later version is running on your device

### 3.2 – Downloading the pDoc Pro Android Client App

The pDoc Pro Client software is available from the Google Play Store. Access the store on the Android tablet, search for pDoc Pro, and install the app on your device directly from the store.

### 3.3 – Make a Dedicated pDoc Pro Client

The pDoc Pro Client application running on Android device is not developed as a Home Screen or Launcher app. For dedicated operation, users may want to employ 3rd party software, for example SureLock and KioWare.

### 3.4 – Permissions Required

The pDoc Pro Android Client application requires the following access permissions to run correctly.

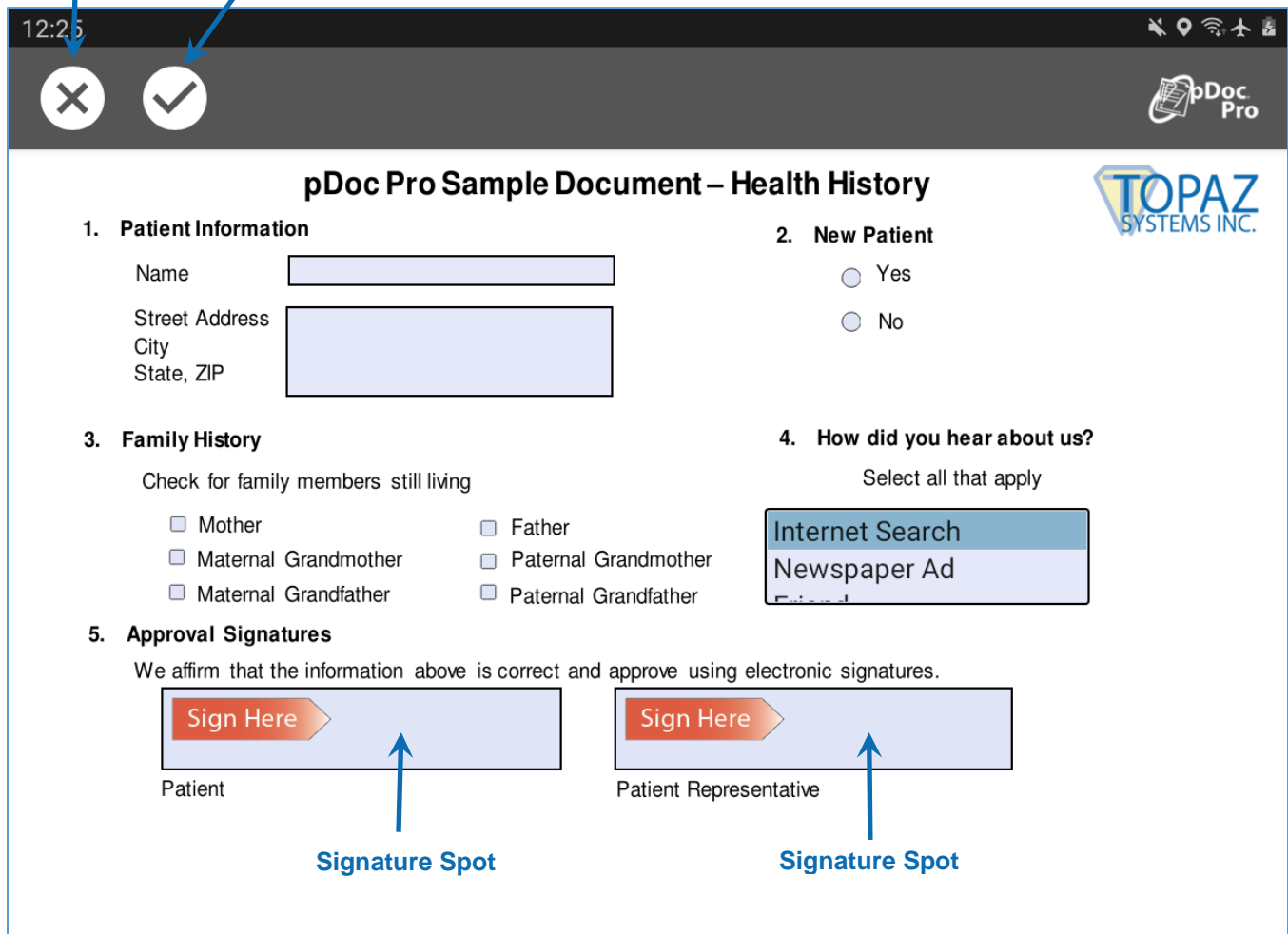
- Location - To access the device's location
- External Storage - To access photos, media, and files on the device
- Camera - To take pictures and record video
- Read Phone State - To read the Device ID for encryption operations

Whenever your device requests for the above permissions, you should grant them for the pDoc Pro Android Client application to function correctly.

## 4.0 – pDoc Signing Screen

The following screenshot of the pDoc Signing Screen on the pDoc Pro Client shows the user interface and a sample document to be filled in and signed.

Cancel button Done button



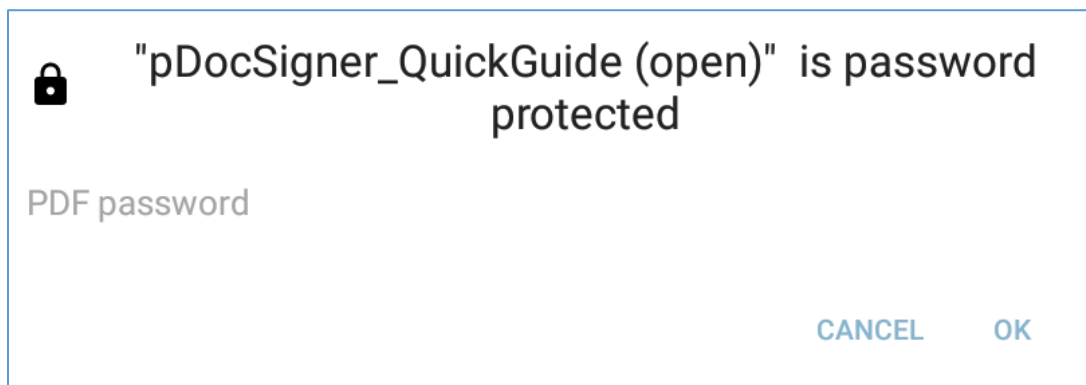
The screenshot displays the pDoc Pro Signing Screen on an Android device. At the top, there is a status bar showing the time 12:25 and various system icons. Below the status bar, there are two circular buttons: a 'Cancel button' (marked with an 'X') and a 'Done button' (marked with a checkmark). The main content area is titled 'pDoc Pro Sample Document – Health History' and features the TOPAZ SYSTEMS INC. logo in the upper right corner. The form is divided into five sections:

- 1. Patient Information:** Includes input fields for Name, Street Address, City, and State, ZIP.
- 2. New Patient:** Contains two radio buttons for 'Yes' and 'No'.
- 3. Family History:** Includes a checkbox for 'Check for family members still living' and a list of checkboxes for 'Mother', 'Maternal Grandmother', 'Maternal Grandfather', 'Father', 'Paternal Grandmother', and 'Paternal Grandfather'.
- 4. How did you hear about us?:** Includes a checkbox for 'Select all that apply' and a list box with 'Internet Search' and 'Newspaper Ad' selected.
- 5. Approval Signatures:** Includes the text 'We affirm that the information above is correct and approve using electronic signatures.' and two signature spots. Each spot consists of a blue box with a 'Sign Here' button and a 'Signature Spot' label below it, with an arrow pointing to the box. The spots are labeled 'Patient' and 'Patient Representative'.

## 4.1 – Basic Operations

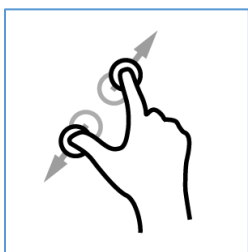
### 4.1.1 – Opening PDF Documents

The pDoc Pro Client automatically opens a PDF document in the pDoc Signing Screen when it receives the document pushed from the pDoc Pro Server. When it opens the PDF document, the pDoc Signing Screen displays the first page of the document. If the PDF document that is being opened is a secured document, the following dialog is displayed, prompting for “Open Password” to open the document. If the user provides the correct password, then the document is opened, otherwise an error message will be displayed.



### 4.1.2 – Navigating and Viewing PDF Documents

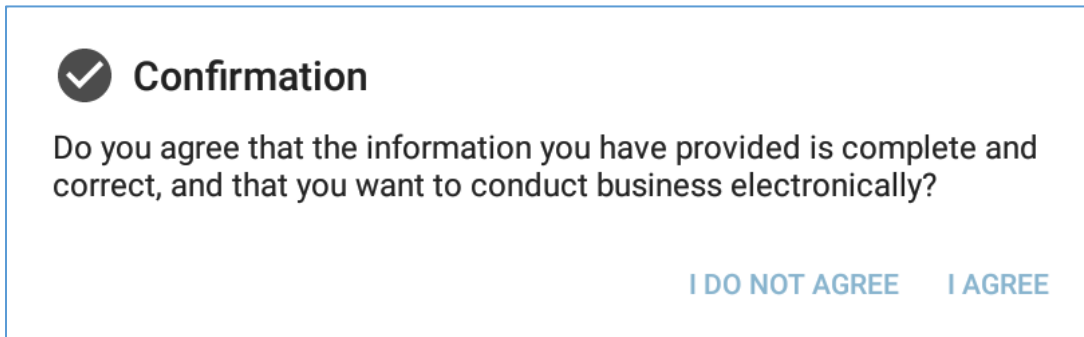
You can scroll through a document’s pages horizontally by swiping across the page left or right. To zoom in and out of a particular page, use the zoom gesture as shown.



If a page is zoomed in you can scroll around the page by the touch, hold, and move gesture.

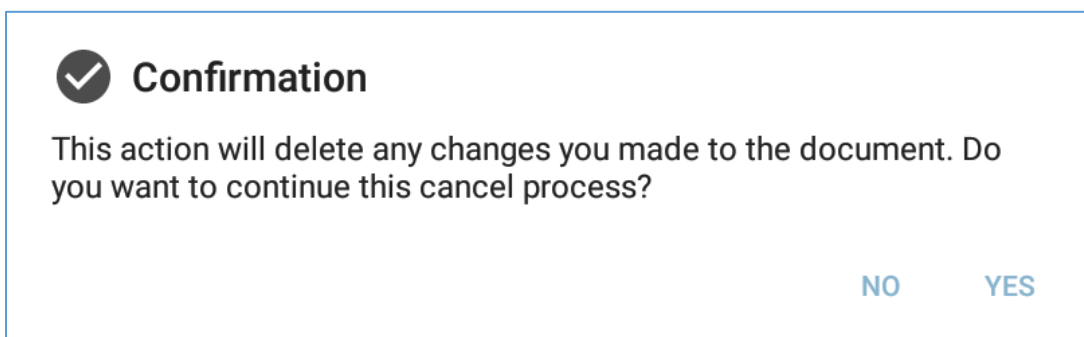
### 4.1.3 – Closing and Saving PDF Documents

After the user fills in the form fields and signs the appropriate signature spots, and then taps the Done button (the check mark in the circle icon), pDoc Pro Client presents the following window. If the user taps the “I AGREE” button, pDoc Pro Client closes the signed document, and sends it back to the pDoc Pro Server where it is saved for future reference. pDoc Pro Client then closes the signing screen, deletes the local copy of the PDF, and shows the Home Screen to await the next document pushed to it.



If the user taps the “I DO NOT AGREE” button, pDoc Pro Client closes the message window so that the user can continue to read the document, fill in form fields, and sign it.

During the course of signing a document, if a user decides they do not want to complete the form and want to terminate the signing session, they can tap the Cancel button (the X in the circle icon), whereupon pDoc Pro Client presents the following window:



If the user taps the “YES” button, pDoc Pro Client deletes signatures and data that have been entered into the document, notifies the pDoc Pro Server that the signing session has been cancelled, deletes the local copy of the PDF, and shows the Home Screen to await the next document pushed to it.

If the user taps the “NO” button, pDoc Pro Client closes the message window so that the user can continue to read the document, sign it, and fill in form fields.

#### 4.1.4 – Signing Session Timeout

If a user does not complete a signing session within the specified timeout period (the default is 10 minutes), pDoc Pro Client will terminate the session and perform the actions above as if the user had cancelled the signing session.

### 4.2 – Electronic Signatures

#### 4.2.1 – Signature Spots on the Signing Screen

A principal feature of the pDoc Pro Client is its ability to capture electronic signatures written on the client screen and securely embed the signatures into digital signature spots in a document. When the pDoc Pro Client receives a PDF document containing signature spots, it opens the document in the pDoc Signing Screen and displays the signature spots that are available for signing as black rectangles, as shown below.



#### 4.2.2 – Signature Capture Process

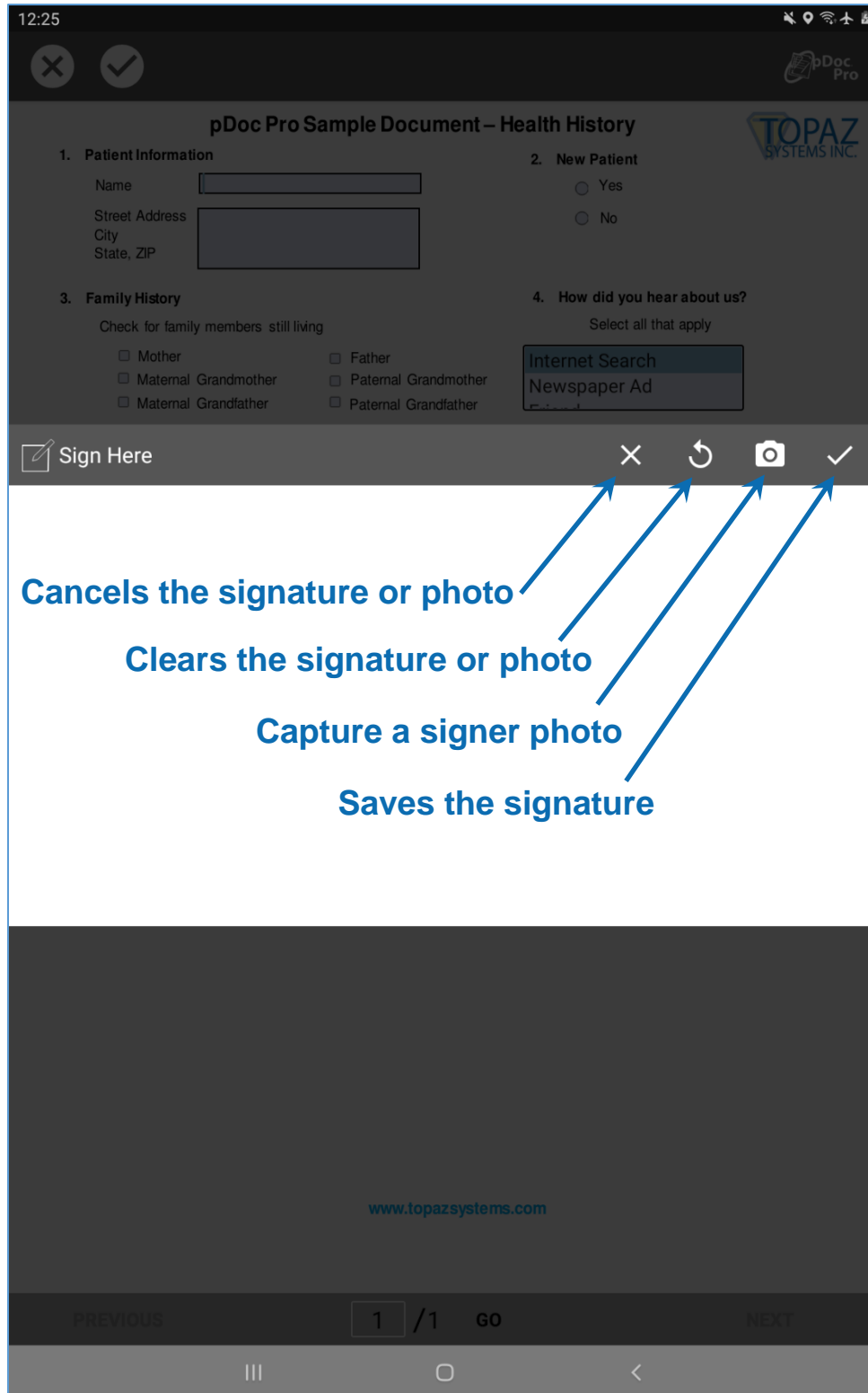
Tap a black electronic signature box to initiate the act-of-signing. A signature capture window will open as shown in the first screen shot below. Sign in the signature box using your finger or client stylus and tap the Done button (the check mark icon) to indicate that that you have completed your signature. pDoc Pro Client will close the signature capture window, embed the signature in the signature spot in the document, and display the updated document. Signature details such as the signer's first name and last name (specified on the Preferences Screen), the date, and time are inserted into the signature field if so indicated by the pDoc Pro Server; see the second screen shot below.

If you tap the Cancel button (the X icon), the signature capture window will close and discard any partial signature you have entered in the signature capture window.

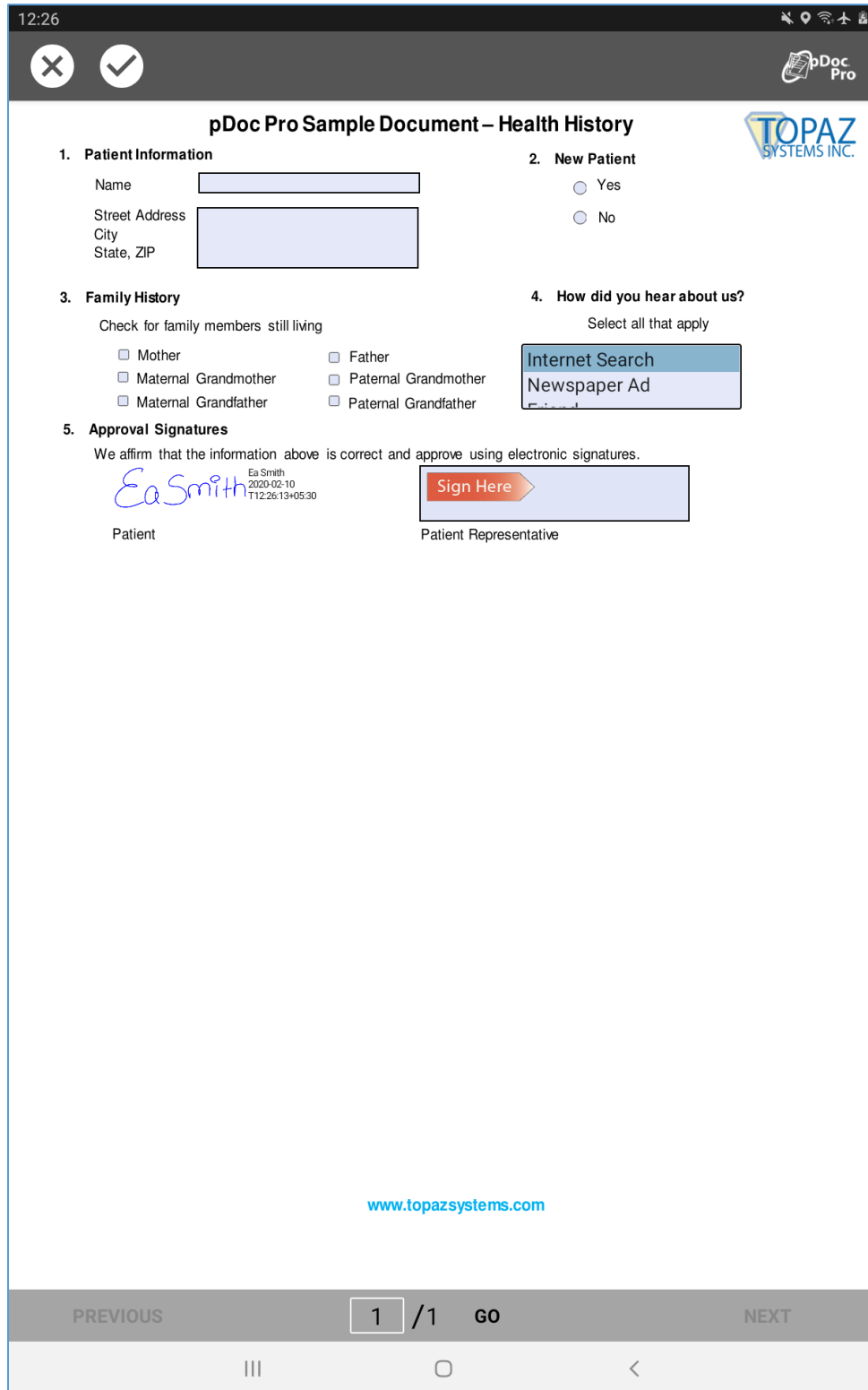
If you tap the Undo button (the looping arrow pointing back icon) on the signature capture window, it will clear the window so that you can start signing once again.

To add a photo to the signing window, tap the Photo button (the camera icon). The procedure to capture the photo is described in detail in the subsequent sections.

Once the act-of-signing is complete, the form fields in the document that are designated to be made read-only when this field is signed become read-only.



Signature Capture Window Appears After Tapping a Signature Box



12:26

**pDoc Pro Sample Document – Health History**

**1. Patient Information**

Name

Street Address

City

State, ZIP

**2. New Patient**

Yes

No

**3. Family History**

Check for family members still living

Mother  Father

Maternal Grandmother  Paternal Grandmother

Maternal Grandfather  Paternal Grandfather

**4. How did you hear about us?**

Select all that apply

Internet Search

Newspaper Ad

**5. Approval Signatures**

We affirm that the information above is correct and approve using electronic signatures.

*Ea Smith* Ea Smith  
2020-02-10  
T12:26:13+05:30

Patient Patient Representative

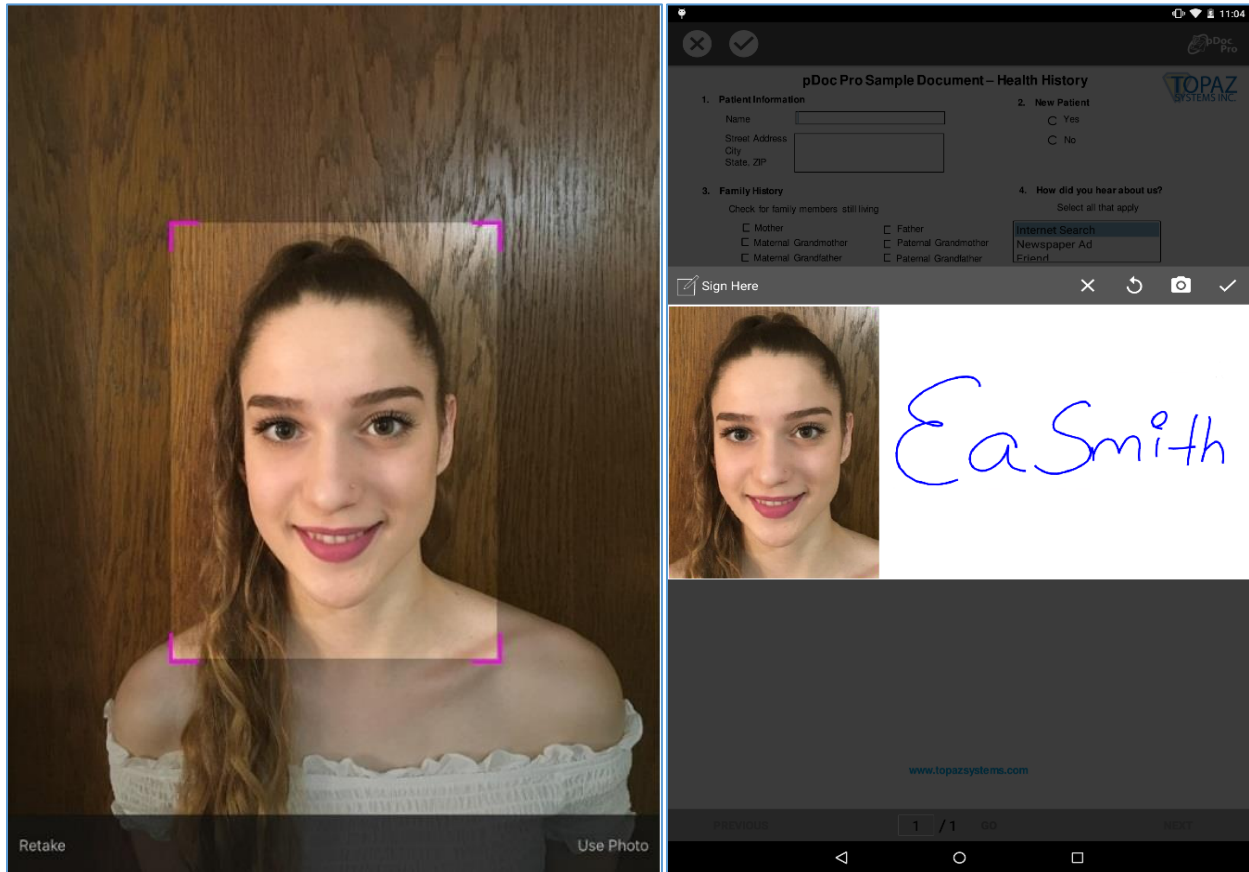
[www.topazsystems.com](http://www.topazsystems.com)

PREVIOUS 1 / 1 GO NEXT

Document Displaying Signature After Signing in the Signing Window

### 4.2.3 – Adding a signer photo to the signature

Sometimes a signer photo may be required to be added to a signature. To add a photo to the signing window, tap the Photo button (the camera icon) to take a picture of the signer. If you are satisfied with the photo, tap the Use Photo button, otherwise, tap the Retake button to take the picture again. The captured photo will be cropped to include only the section indicated by the preview portrait guidelines. Note that the photo must be captured before signing in the signature box.





### **4.3 – Filling Form Fields**

When the pDoc Pro Client receives a PDF document containing form fields, it opens the document in the pDoc Signing Screen and displays the form fields that are available for filling at appropriate locations. The form fields supported are Text Boxes, Radio Buttons, Check Boxes, List Boxes, and Combo Boxes.

#### **4.3.1 – Text Box**

When you tap inside a text box, the signing screen shows a blinking cursor. Enter text into the text box using your keyboard. Both single and multi-line text boxes are supported.

#### **4.3.2 – Radio Button**

Tapping a radio button will select it and deselect any other radio button in that group that had been selected.

#### **4.3.3 – Check Box**

Tapping a check box changes its status from unchecked to checked or vice-versa.

#### **4.3.4 – List Box**

Tapping an entry in a list box highlights it if it had not been selected; if it had already been selected, it removes the highlight.

Note: With some documents with the list box scroll bar could be very narrow and difficult to manipulate. In such cases scrolling may be done using the stylus or by zooming the document and scrolling with touch.

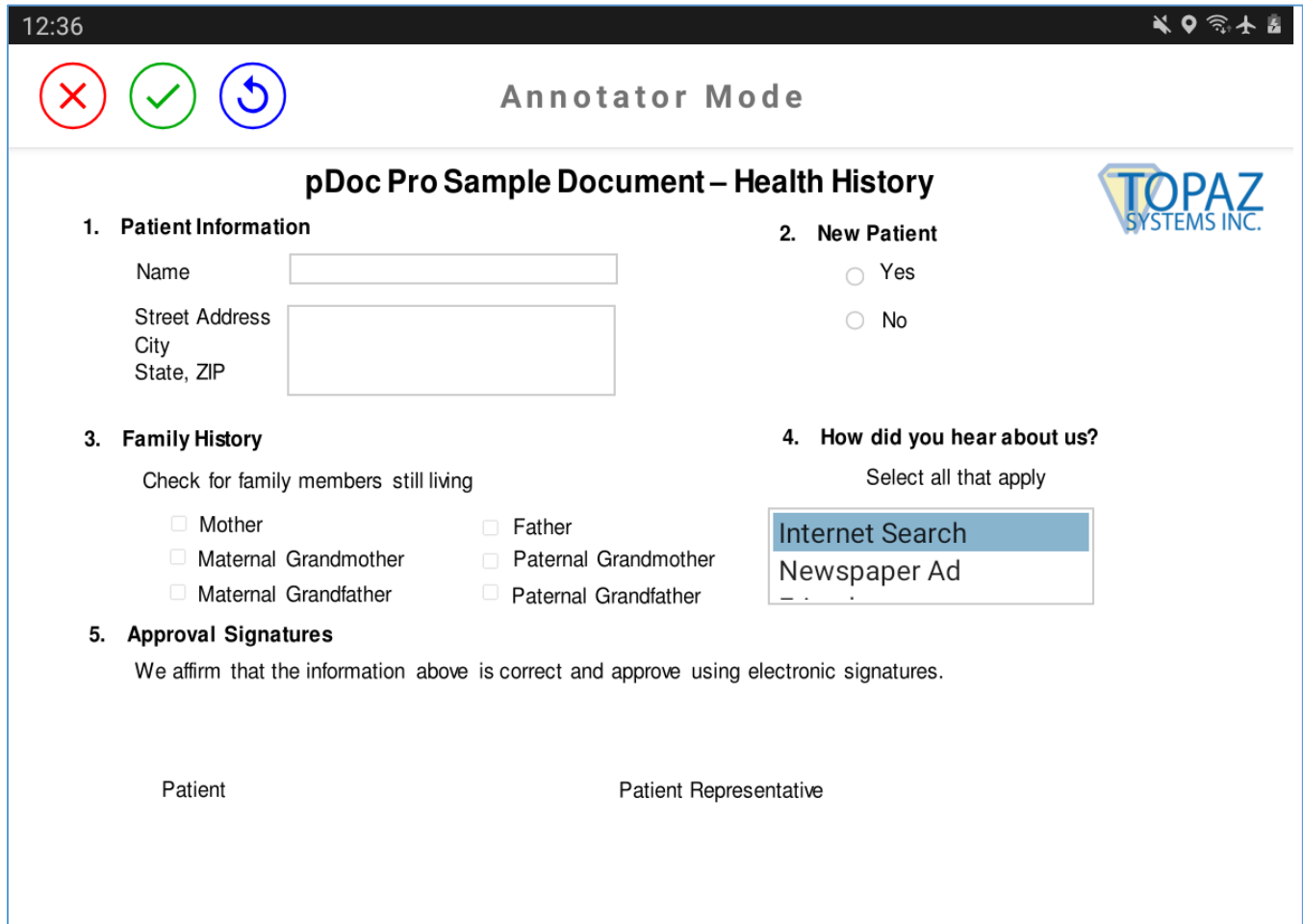
#### **4.3.5 – Combo Box**

Tapping an entry in a combo box either highlights it or un-highlights it depending on the original state, or provides the capability to enter text for an entry as in text boxes.

### 4.4 – Annotating Documents

In annotation mode, pDoc Pro Client is used to markup document pages by drawing on the pages freehand. It is similar to a pencil tool that allows the user to create free-form drawings and text.

When the pDoc Pro Client receives a PDF document to be annotated, none of the fields will be available for form filling.



12:36

**Annotator Mode**

**pDoc Pro Sample Document – Health History**

**1. Patient Information**

Name

Street Address

City

State, ZIP

**2. New Patient**

Yes

No

**3. Family History**

Check for family members still living

Mother  Father

Maternal Grandmother  Paternal Grandmother

Maternal Grandfather  Paternal Grandfather

**4. How did you hear about us?**

Select all that apply

Internet Search

Newspaper Ad

**5. Approval Signatures**

We affirm that the information above is correct and approve using electronic signatures.

Patient

Patient Representative

### 4.4.1 – Annotator Mode

When the app is the annotation mode, the toolbar changes and colored icons are displayed on a white background instead of the usual black and white icons. Each of the icons functionality has been described below.



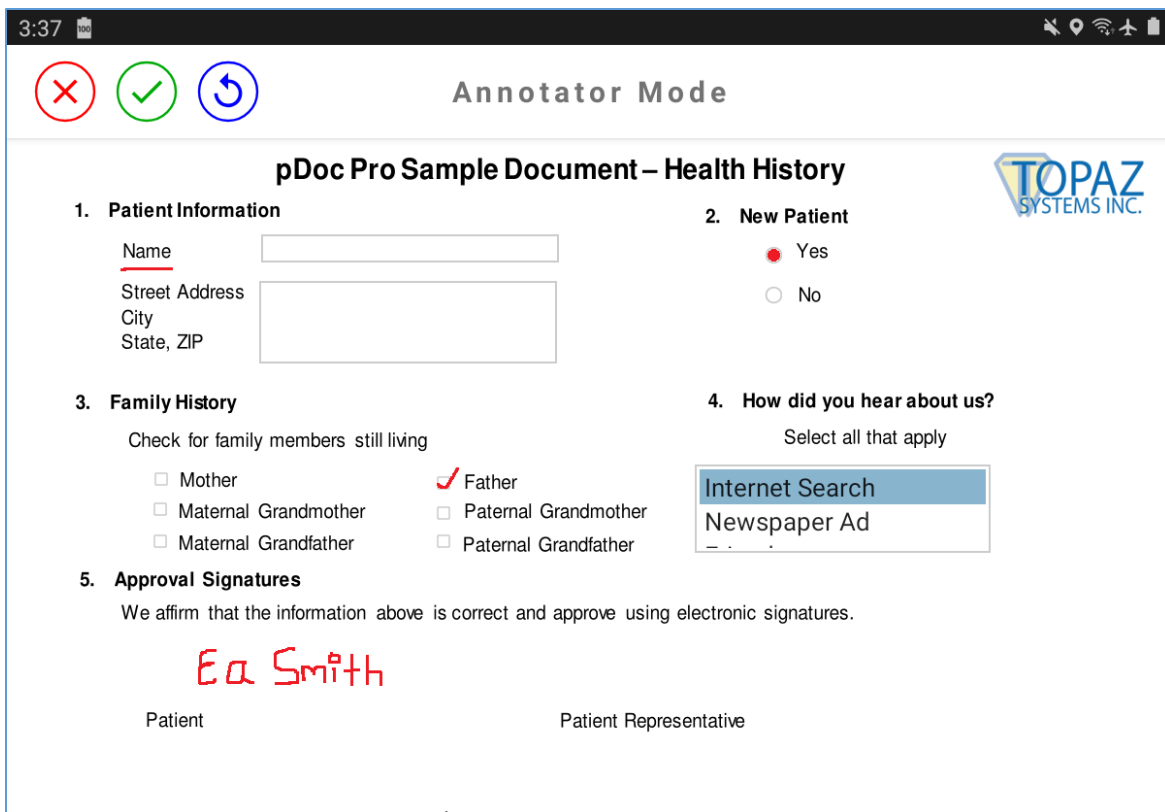
Tapping the above icon will erase all the annotations that have not already been embedded in the PDF document and allow you to resume annotating the page again.



Tapping the above icon will end the current annotating activities and embed the markups into the PDF document.



Tapping the above icon will erase the last drawing stroke captured during the current annotating activities.



**Annotator Mode**

**pDoc Pro Sample Document – Health History**

**1. Patient Information**

Name

Street Address

City

State, ZIP

**2. New Patient**

Yes

No

**3. Family History**

Check for family members still living

Mother  Father

Maternal Grandmother  Paternal Grandmother

Maternal Grandfather  Paternal Grandfather

**4. How did you hear about us?**

Select all that apply

Internet Search

Newspaper Ad

**5. Approval Signatures**

We affirm that the information above is correct and approve using electronic signatures.

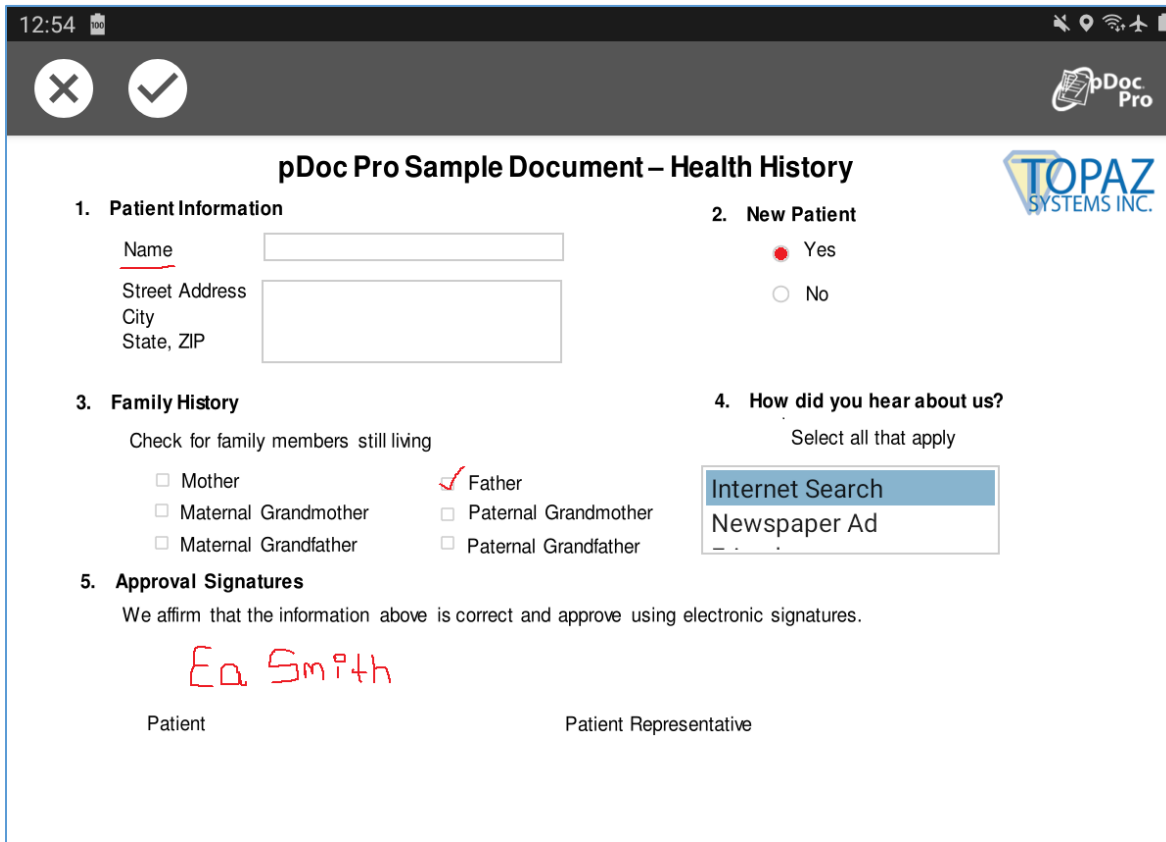
*Ea Smith*

Patient

Patient Representative

Note: Annotations that are not saved can be undone; Embedded (saved) annotations cannot be removed.

When annotating activities end, the app’s original toolbar will be displayed to allow the document to be returned to the server or the session cancelled (See screenshot below).

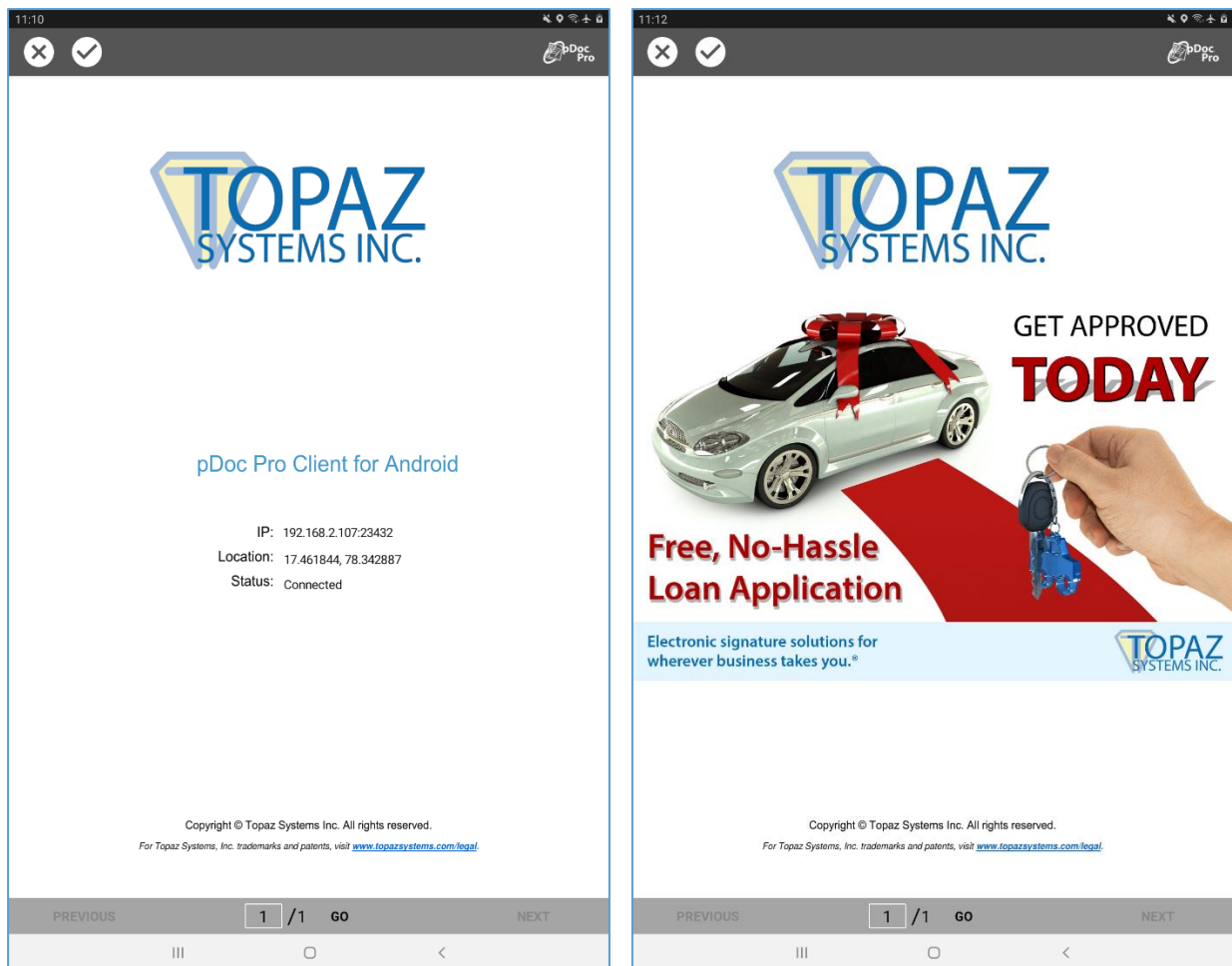


In addition, the PDF document can be navigated to other pages to be annotated. To re-enter the annotation mode on the current page simply tap anywhere on the page. The toolbar will disappear and the three buttons annotation toolbar will appear again indicating the app is in annotation mode again.

## 5.0 – Home Screen

### 5.1 – Home Screen Display

The Home Screen runs on a pDoc Pro Client when it is in idle mode and not serving a document signing request from a pDoc Pro Server. The default idle screen is an information screen that shows status information and can be customized. Alternatively, advertising images or video can be sent to the client app from the pDoc Pro Server. The images or video will overlay the default screen as illustrated. For information about how to specify the information screen, images, or video that appears on the pDoc Pro Client Home Screen, see the pDoc Pro Server user manual.



The following image and video formats are supported by pDoc Pro Android Client:

1. **Image:** .bmp, .jpg, .jpeg, .gif, .png
2. **Video:** .mp4, .3gp, .asf, .m4v, .mkv, .wmv

## 5.2– Customizing the Default Information Screen

The pDoc Pro Client app utilizes a PDF document for its information screen. Any single page PDF can be used for this purpose. In addition to graphics for logos and marketing, three predefined PDF form text fields can be used to indicate the device network address, location, and app status. To provide this status information on the information screen, add the following form fields to the custom PDF.

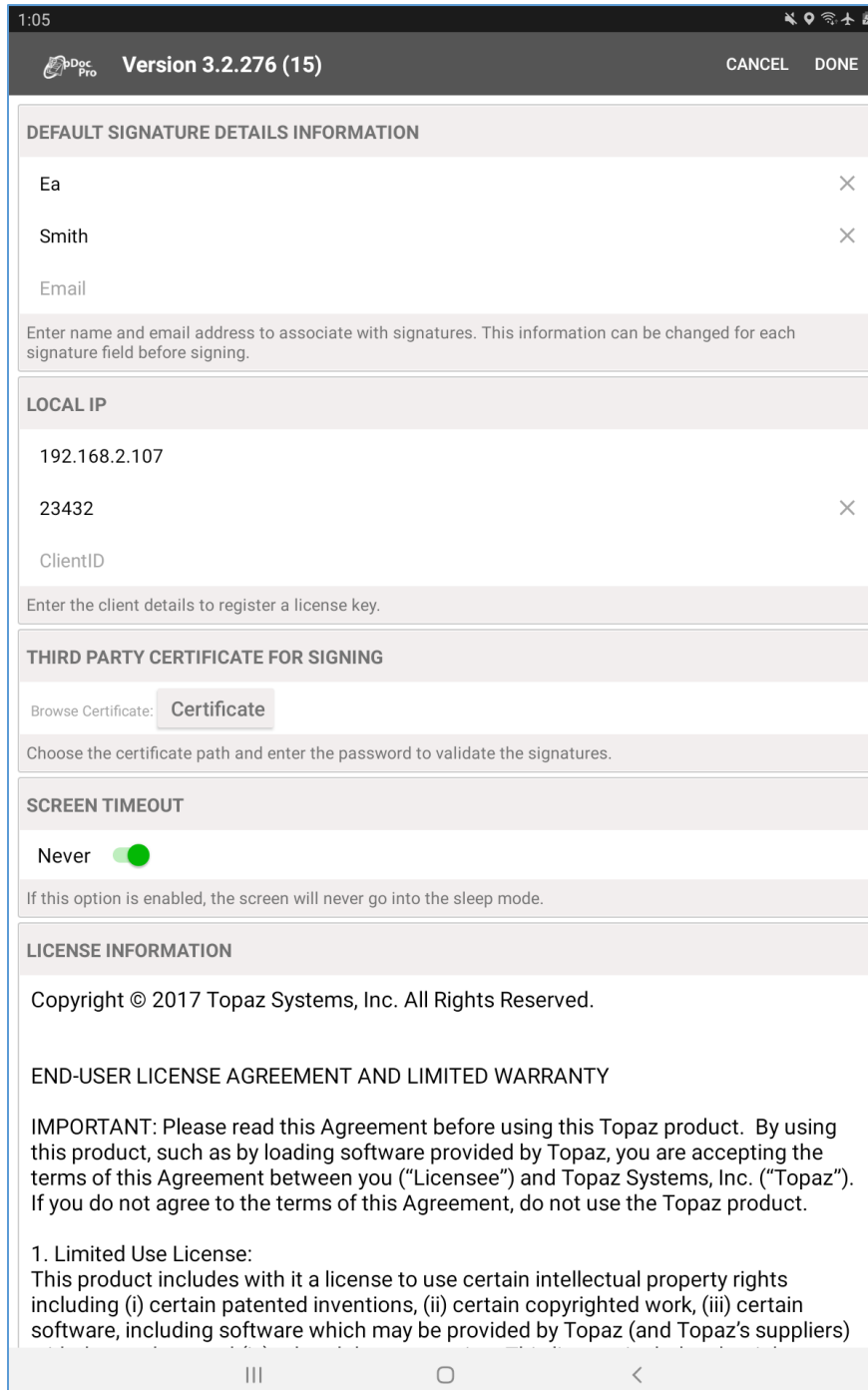
- > **IP:** Text field named 'IP'
- > **Location:** Text field named 'Location'
- > **Status:** Text field named 'Status'



## 6.0 – Preferences Screen

### 6.1 – Preferences Screen Display

The Preferences Screen can be launched by tapping the pDoc pro icon on the top toolbar. The following screen will be displayed.



1:05

pDoc Pro Version 3.2.276 (15) CANCEL DONE

**DEFAULT SIGNATURE DETAILS INFORMATION**

Ea ×

Smith ×

Email

Enter name and email address to associate with signatures. This information can be changed for each signature field before signing.

**LOCAL IP**

192.168.2.107

23432 ×

ClientID

Enter the client details to register a license key.

**THIRD PARTY CERTIFICATE FOR SIGNING**

Browse Certificate: Certificate

Choose the certificate path and enter the password to validate the signatures.

**SCREEN TIMEOUT**

Never

If this option is enabled, the screen will never go into the sleep mode.

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### 6.1.1 – Signature Information

The preferences screen can be used to capture and persist the signature information such as First Name, Last Name, and Email. These details are embedded into PDF signatures along with the biometric signature information to identify the signer. The following image shows the signature information section of the preferences screen.

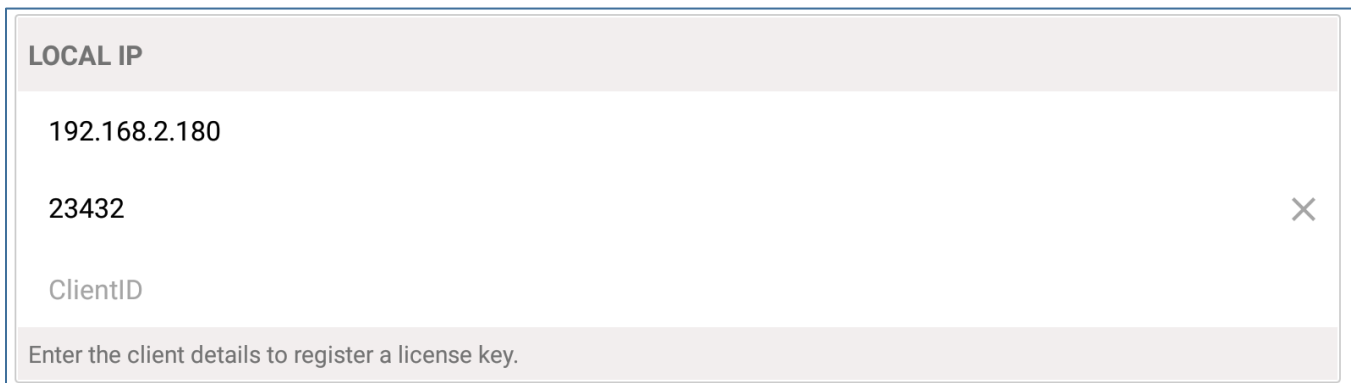


DEFAULT SIGNATURE DETAILS INFORMATION	
Ea	X
Smith	X
Email	

Enter name and email address to associate with signatures. This information can be changed for each signature field before signing.

### 6.1.2 – Client Information

This screen also displays the IP address of the device, port number and client identifier under the “Local IP” section. The following image shows the client information section of the preferences screen.



LOCAL IP	
192.168.2.180	
23432	X
ClientID	

Enter the client details to register a license key.

Port Number is used to communicate with pDoc Pro Server and to exchange data between the client and server. The pDoc Pro Android Client provides a way to change this port number manually. To change the port number, enter the port number in the relevant text field and then tap the DONE button on the top right corner of the screen. This will automatically restart the application and use the new port number for further communication.

Note: In the Android OS, available port numbers range from 1058 to 65535.

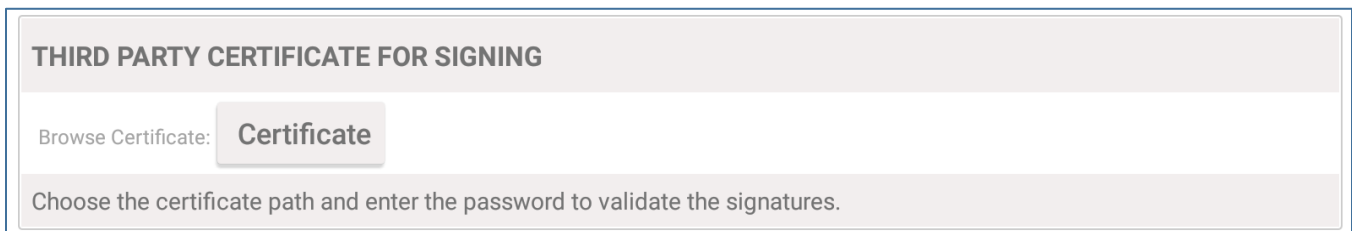


The “ClientID” field is for specifying the pDoc Pro Client license key if required. The pDoc Pro Client paid application downloaded from the Google Play Store has a default license key coded in the software, and there is no requirement to enter information in the “ClientID” field. If a key is specified, it will be verified instead of the default key coded within the software with the pDoc Pro server before a signing session is started.

Note: In the full edition pDoc Pro Client app, the “ClientID” field is not visible to the user in the Preferences Screen. In the evaluation edition pDoc Pro Client app, the “ClientID” field is visible to the user in the Preferences Screen to enter the key.

### 6.1.3 – Certificate Selection

Signing in pDoc Pro requires the use of a digital certificate. During its installation process, pDoc Pro automatically installs and configures a certificate that is used by default for signing. If users wish to use a different certificate that represents their organization, they can configure a third party certificate using the preferences screen. To select a different certificate for signing, tap on the pDoc Pro icon on the top toolbar and then tap on the “Certificate” button.

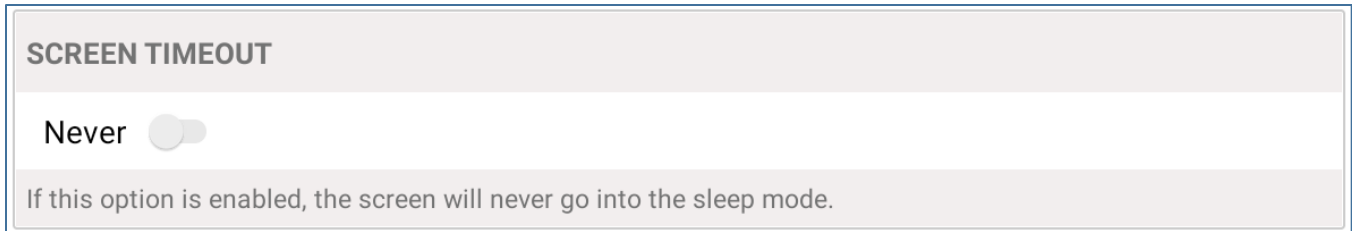


To select another certificate for signing, tap on “Browse” button to browse the certificate for signing, then enter the password in the Password text box, and tap on the OK button.

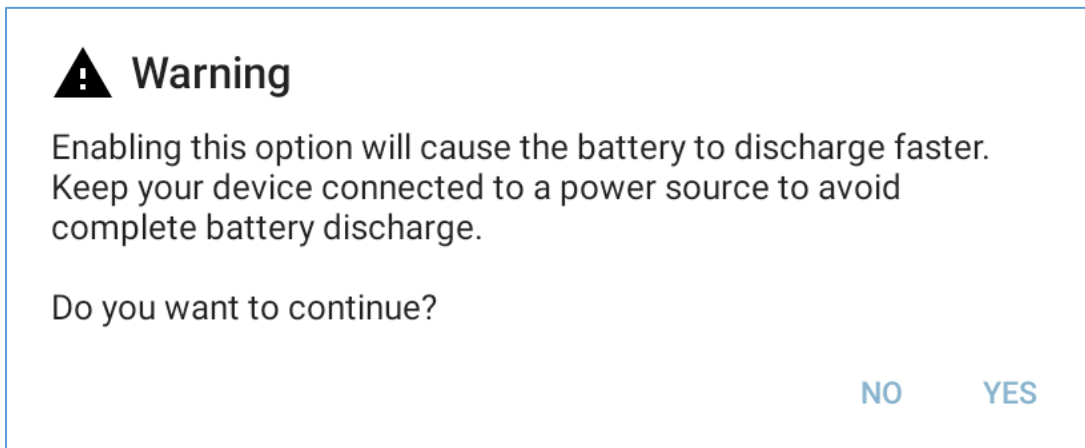


### 6.1.4 – Screen Timeout

To keep the Android tablet from going into the sleep mode, enable the “Never” option in the “SCREEN TIMEOUT” section as shown. The “Never” option is disabled by default.



Upon enabling the “Never” option, a warning message will be displayed as shown in the screenshot below.



If the “YES” option is selected the “Never” option will be enabled and the device will never go into the sleep mode. If the “NO” option is selected, no changes will be made and the option will not be enabled.

## 7.0 – Automatic Signing Certificate Update

pDoc Pro Client utilizes a signing certificate issued by a trusted Certificate Authority to securely encrypt each signature into your PDF documents. This enables PDF viewer software systems, like pDoc Signer, to validate signatures and determine if a document has been altered after the signature was applied. Signing certificates are like licenses in that they are issued for a certain period of time, typically one to three years.

pDoc Pro Client periodically checks the expiration date of the certificate being used for signature encryption. With the Topaz provided signing certificate, if the expiration date of the signing certificate is imminent or has passed, pDoc Pro Client will notify you by displaying a message and then will attempt to connect to the Internet and automatically download a new signing certificate from the Topaz website. If the signing certificate has expired, pDoc Pro Client will not allow you to proceed with the signing process.

Automatic signing certificate update is available only for the Topaz provided signing certificate that is bundled with the app. For Third party certificates, a message will be displayed prompting the end user to provide a different valid certificate.