



User Manual

pDoc Pro Client for iOS

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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 transaction solution for network environments where a central system pushes documents to iPads, Windows tablets, or tablet displays for transaction review and signing. The document can be a PDF form, contract, or other document, with the user optionally filling in text boxes, check boxes, and radio buttons, selecting list items, and signing the document. 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, and for archiving. The client can then go to sleep until it receives another document for signing, or can be used to display text, graphics, or video advertising content.

This system is a scalable “one-to-many” system where one the server system can control the concurrent signing of unique transactions on multiple tablet devices.

A typical environment is shown below. The network connections can be wired or wireless; with the host server and clients on the same network. iPad clients are typically connected to the network through WiFi.

pDoc Pro Client software is unique among signature apps in that every pDoc Pro signature is captured and saved in 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

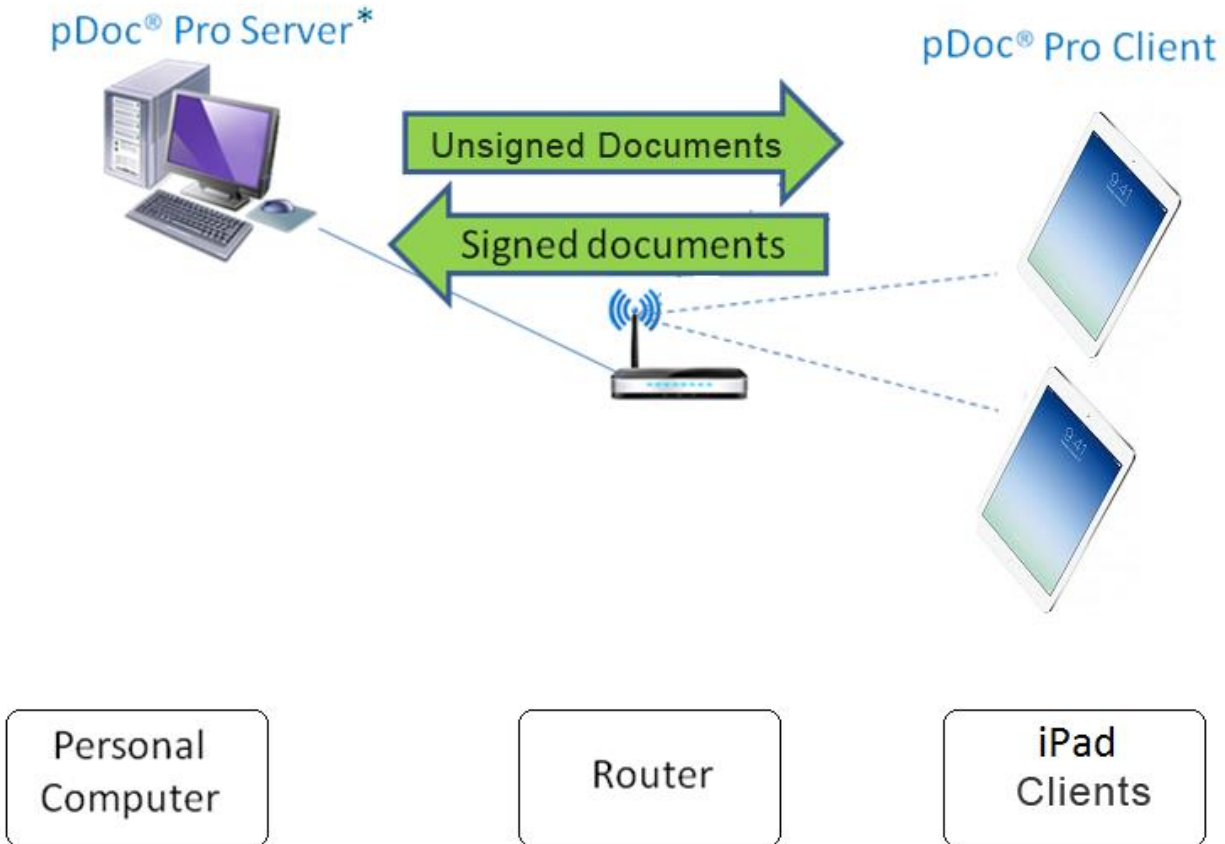
The pDoc Pro eSign Software System comprises:

- One or more pDoc Pro Clients. The two components of a pDoc Pro Client are
 - A client computer, which can be an Apple iPad device, a Windows tablet, or a PC with a signature pad or tablet display. This document describes the iPad pDoc Pro Client.
 - The pDoc Pro Client Software that runs on the client 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 blank documents to the iPad clients and receives signed documents back from the clients. While this diagram shows only iPad clients, a pDoc Pro system may contain both 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 WiFi and the PC to be connected to the LAN through a wired network interface.

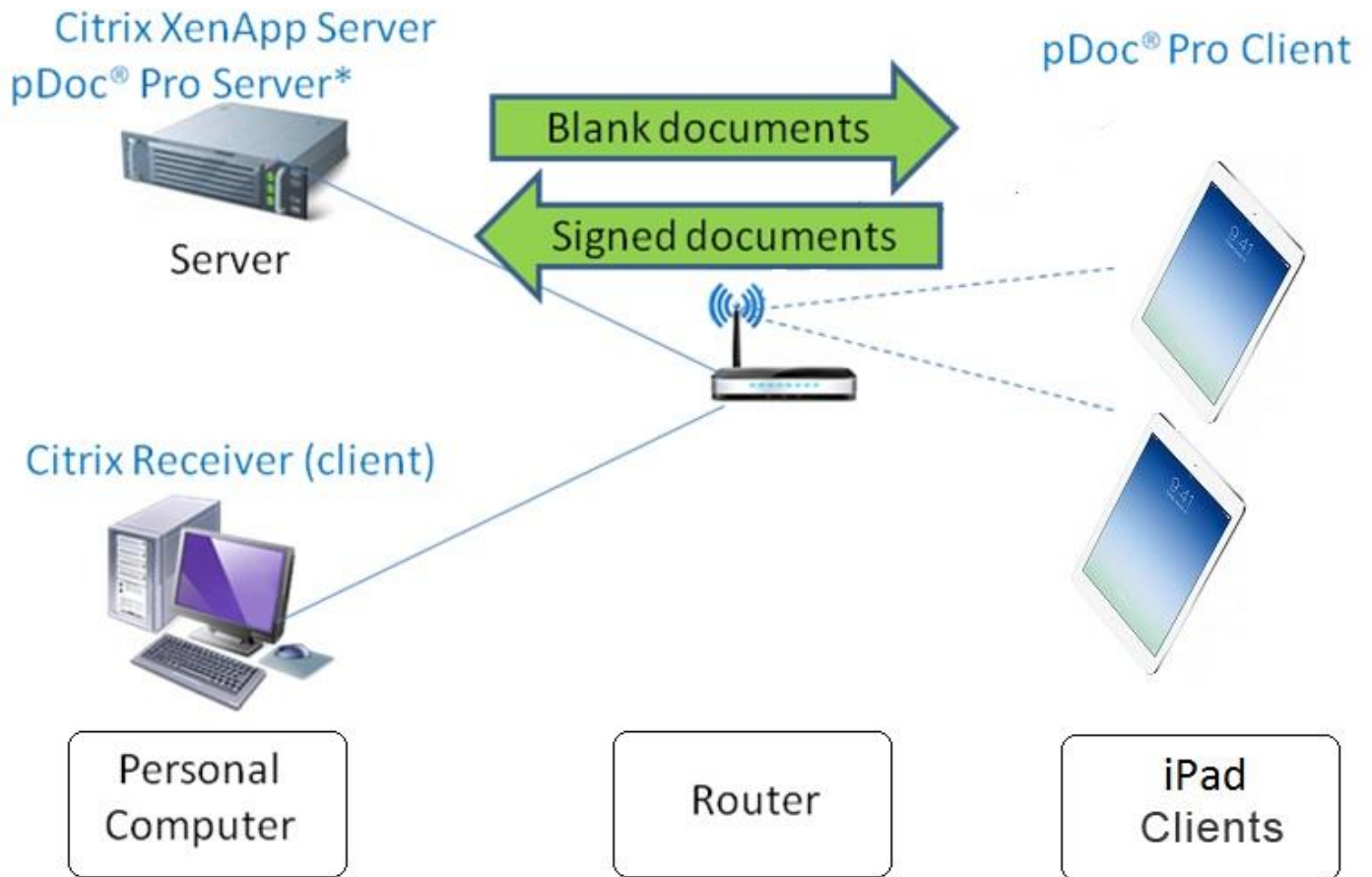
pDoc Pro eSign Software System Standard Configuration



* 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 iPad 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 WiFi and the PC and the server to be connected to the LAN through wired network interfaces.

pDoc Pro eSign Software System Citrix Configuration



* pDoc® Pro Server comprises the Administrator and Originator functions

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 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 blank document to the client
 - c. The server can also send documents to the iPad client automatically without operator intervention. See the server user manual for 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
 - 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. 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 iPad 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 iPad that is used by one person typically runs the pDoc Pro Client Software in non-dedicated mode, i.e., the user will use the iPad for other functions in addition to the document signing or annotating.

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.

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

- pDoc Client Screen
- Home Screen

2.1 – Client Usage: Signing and Annotating

pDoc Pro Client can be used to sign or to annotate a PDF document:

- In signing mode, clients can use the on-screen keyboard to fill in form fields and the stylus or 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.
- In annotating mode, the PDF document pushed to the client is treated as an image, and annotations made on the document using a finger or stylus are stored as line drawings; individual signatures are not embedded into the PDF document. When the Server receives an annotated document, it adds an invisible digital signature to the document so that any further changes to the document will be tracked.

2.2 – 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.

If the document received by the client is for annotating operation, the pDoc Client Screen allows adding pencil annotations to the PDF document. The pencil annotations can be added using the touch or stylus interface. The annotated PDF document can be viewed in pDoc Signer, or by other PDF document rendering applications like Adobe Acrobat and Reader.

2.3 – Home Screen

The Home Screen application runs when the pDoc Pro Client is not serving any signing requests. It displays a default information screen or a customized single page PDF.

3.0 – Installing/Uninstalling pDoc Pro Client Software

3.1 – Before You Begin

- pDoc Pro Client Software runs on an Apple iPad
- Make sure you have the latest iOS version running on your device

3.2 – Downloading the pDoc Pro iOS Client App

The pDoc Pro Client software is available from the private Apple B2B App Store. Contact Topaz Systems to purchase one or more licenses and then redeem the licensing codes on the regular Apple App Store to install the app on your device (www.topazsystems.com/contact_sales.html).

3.3 – Make a Dedicated pDoc Pro Client

After the installation of the pDoc Pro Client software is completed, to make the client a dedicated pDoc Pro Client, follow the instructions below. This will typically be the case for iPads that will be dedicated to form filling and signing, and will be used for short periods by many different users. After the client is started, the application runs automatically and continuously, the home screen either displays the information screen or a PDF pushed from the server to be signed.

To make the pDoc Pro app dedicated, access the device Settings > General > Accessibility > Guided Access options:

- Turn ON Guided Access
- Set a passcode to prevent someone from dismissing the app
- Turn OFF Accessibility Shortcuts

Then run the pDoc Client app and Triple-Click the Home button to start dedicated mode

3.4 – Configure pDoc Pro Client from Dedicated Mode

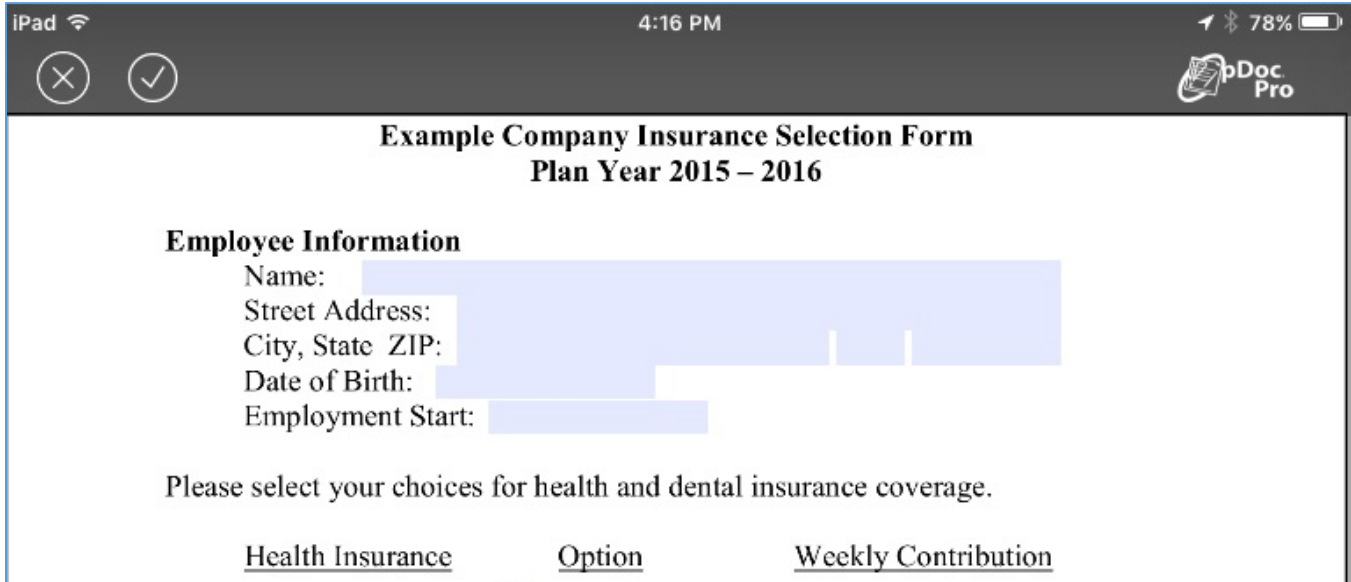
To configure dedicated mode Triple-Click the home button to access the options:

- Enable only keyboard hardware options
- Turn off Time limit
- Turn on Touch

Tap Resume to continue in dedicated mode or End to terminate and return to normal device operation.

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.



iPad 4:16 PM 78%

Example Company Insurance Selection Form
Plan Year 2015 – 2016

Employee Information

Name:

Street Address:

City, State ZIP:

Date of Birth:

Employment Start:

Please select your choices for health and dental insurance coverage.

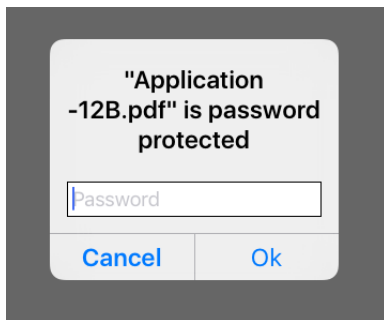
<u>Health Insurance</u>	<u>Option</u>	<u>Weekly Contribution</u>
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4.1 – Basic Operations

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.



If the document being opened also had a “Permissions Password” along with the “Open Password”, then features of the document are enabled or disabled based on the permissions set when the document was secured.

If the document being opened has only a “Permissions Password”, the password dialog is not displayed, but features of the document are enabled or disabled based on the permissions set when the PDF was secured.

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 pinch and zoom gesture.

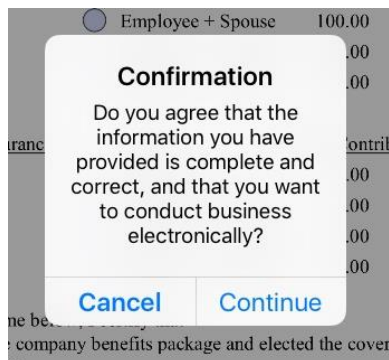


If a page is zoomed in you can scroll around the page by the touch, hold, and move gesture.

4.1.3 – Closing and Saving PDF Documents

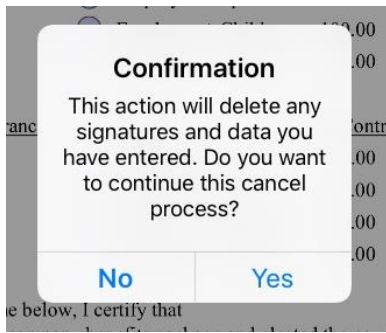
After the user fills in the form fields, signs the appropriate signature spots, and then taps the Done button (the check mark in the circle icon), pDoc Pro Client presents the following window.

If the user taps the “Continue” 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 (if it is a dedicated client) to await the next document pushed to it.



If the user taps the “Cancel” 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.

During the course of signing and entering data into 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 in 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.

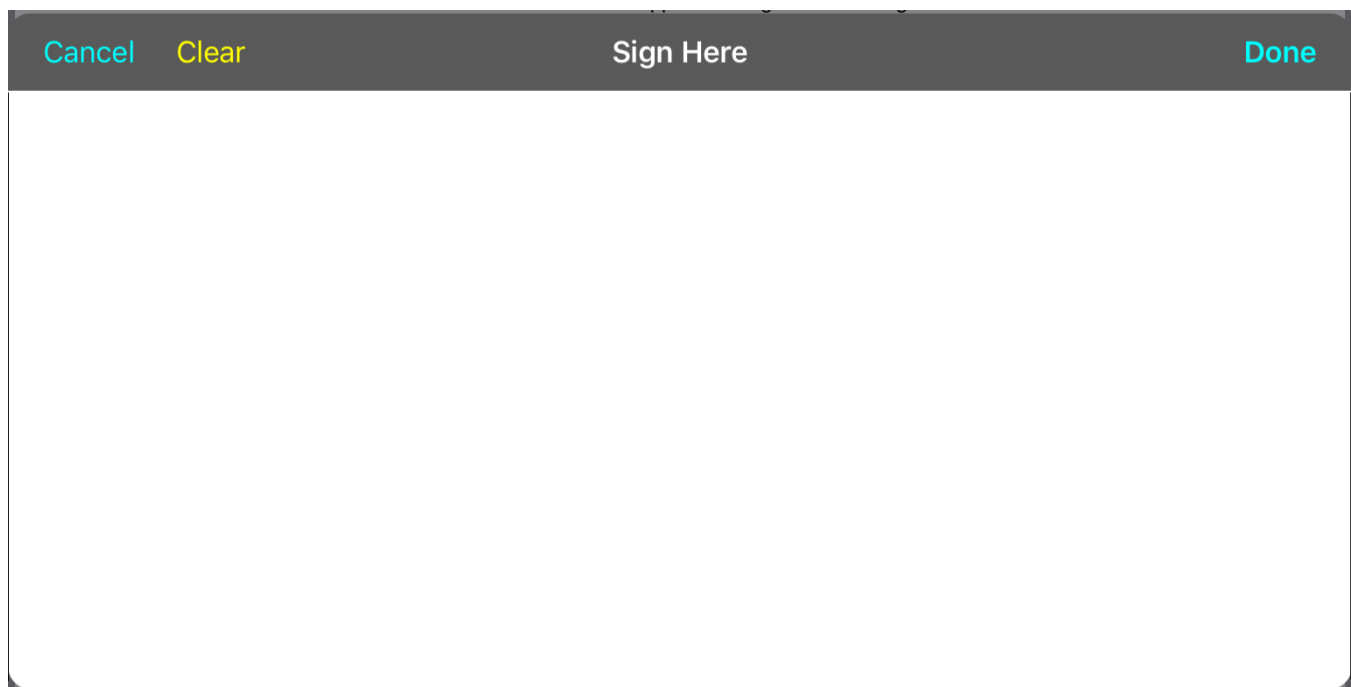
4.2.2 – Signature Capture Process

Tap a black electronic signature box to initiate the act-of-signing. A signature capture window will open as shown in the screen shot below. Sign in the signature box using your finger or client stylus and tap the Done button 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.

If you tap the Clear button on the signature capture window, it will clear the window so that you can start signing once again.

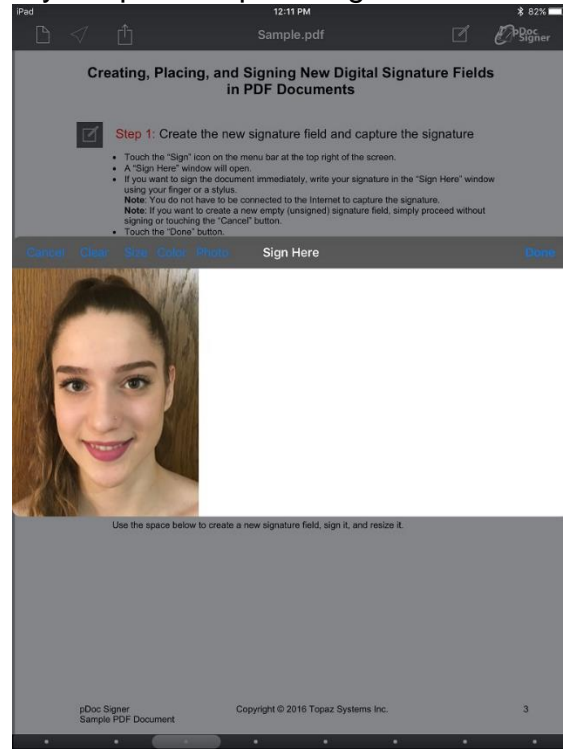
If you tap the Cancel button, the signature capture window will close and discard any partial signature you have entered in the signature capture window.

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.



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, touch on the Photo button to take a picture of the signer. The captured photo will be cropped to include only the section indicated by the preview portrait guidelines.



4.3 – Filling in 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.

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

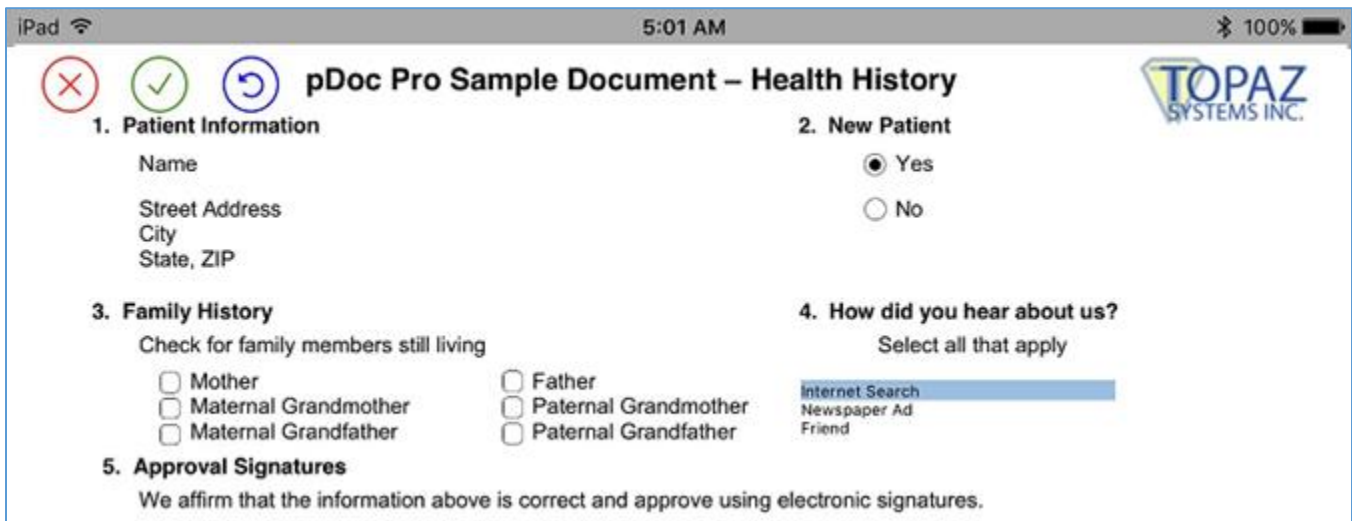
Tapping an entry in a list box highlights it if it had not been selected; if it had already been selected, it un-highlights it.

4.3.5 – Combo Box

Tapping an entry in a combo box either highlights it or un-highlights it depending on the original state, and 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. When the pDoc Pro Client receives a PDF document to be annotated, all fields that the document contains will not be available.



iPad 5:01 AM 100%

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
 Maternal Grandmother
 Maternal Grandfather

Father
 Paternal Grandmother
 Paternal Grandfather

4. How did you hear about us?

Select all that apply

Internet Search
 Newspaper Ad
 Friend

5. Approval Signatures

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

4.4.1 – Annotation Mode

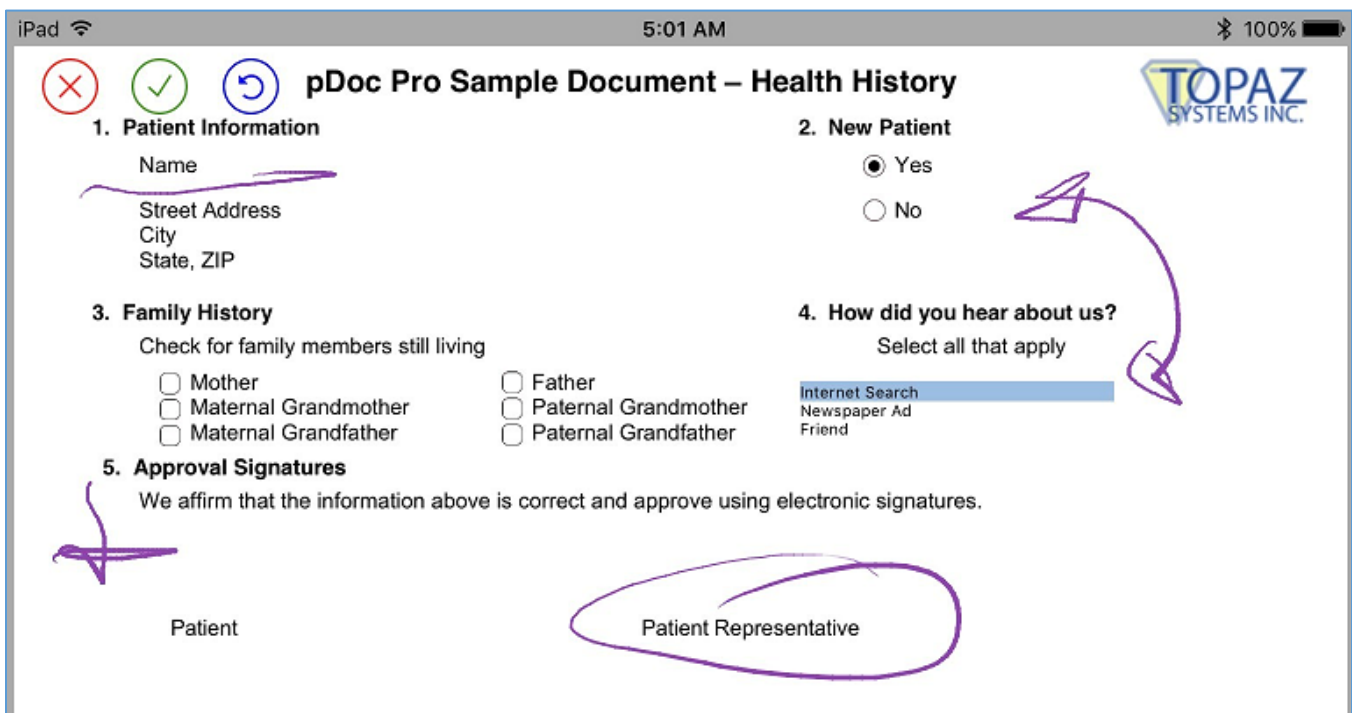
When a document to be annotated is received, the app will automatically switch to annotation mode. This mode is indicated by three colored annotation action buttons at the top left hand corner of the page. The annotation activities for the current document page can be managed using these three buttons:

Cancel: This will erase all the annotations that have not already been embedded in the PDF document and allow you to start annotating the page again.

Save: This will end the current annotating activities and embed the markups into the PDF document.

Undo: This will erase the last drawing stroke captured during the current annotating activities.

Note: Annotations not saved yet are drawn in purple line color, embedded annotations are displayed in red line color. Embedded annotations (red colored markups) cannot be removed.



iPad 5:01 AM 100%

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

Friend

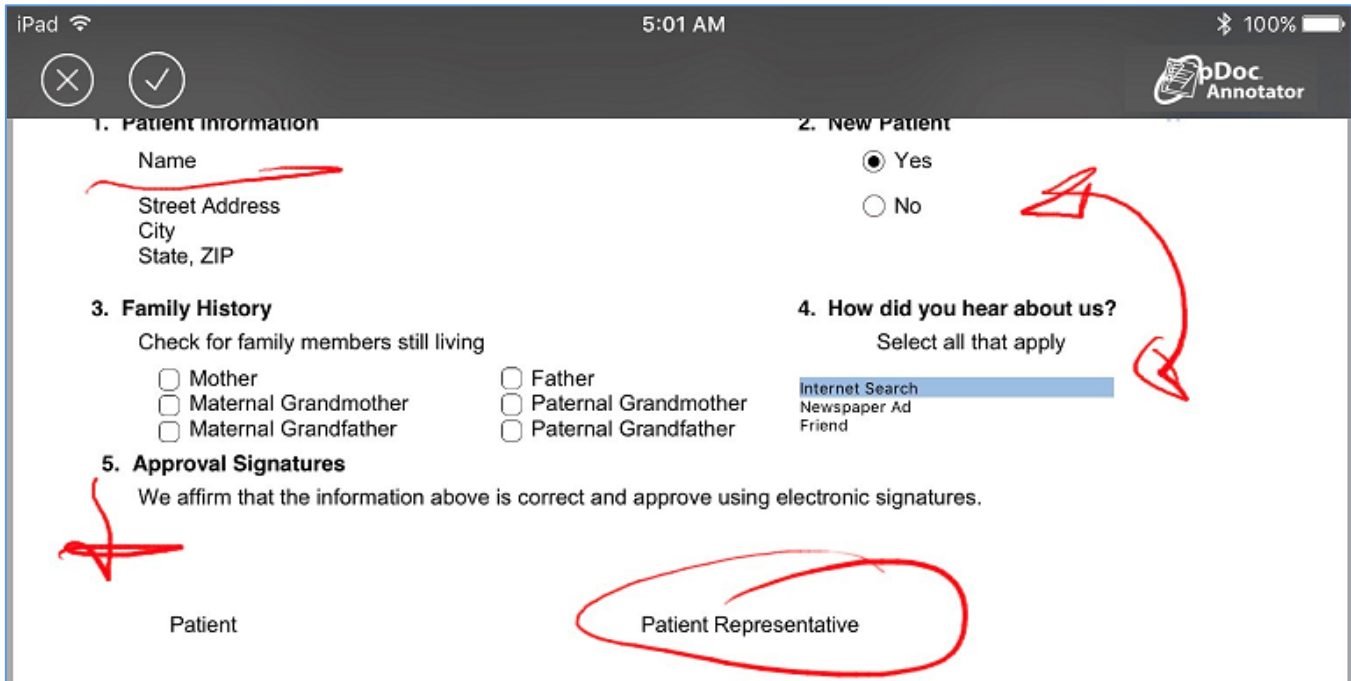
5. Approval Signatures

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

Patient _____

Patient Representative _____

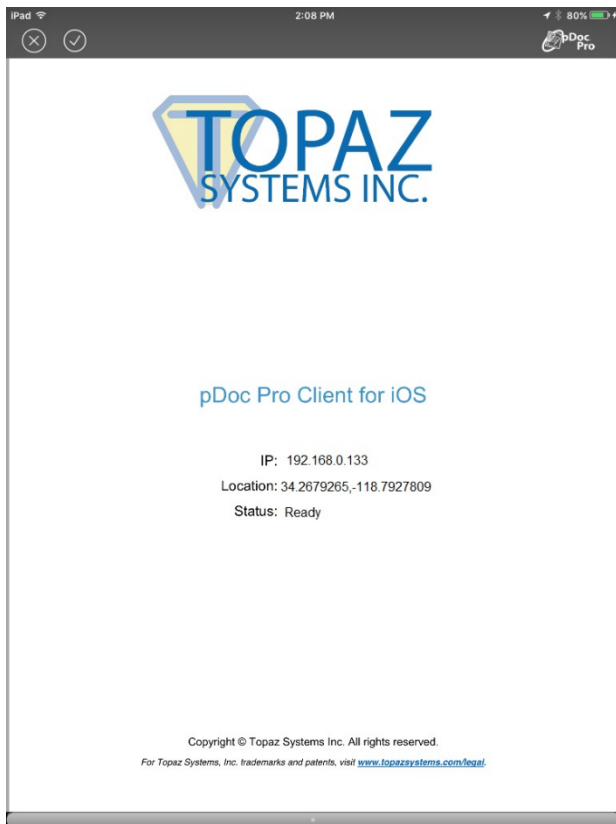
When annotating activities end, the app's menu bar will be displayed to allow the document to be returned to the server or the session cancelled. In addition, the PDF document can be navigated to other pages to be annotated. To re-enter annotation mode on the current page simply tap anywhere on the page. The menu bar will disappear and the three annotation colored buttons 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.



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 named ‘~!dle.pdf’:

IP: Text field named ‘IP’
 Location: Text field named ‘Location’
 Status: Text field named ‘Status’

The default information screen can be replaced in the stock app after it’s downloaded and installed by sending a custom information screen PDF (~!dle.pdf) to pDoc Pro Client via the iOS app sharing mechanism. For example, if the PDF is sent to the device via email, select the PDF attachment from the email, touch the share button from the PDF preview and select the pDoc Pro Client app. Once the app opens you will not see the PDF. Instead it will be installed replacing the default information screen PDF. Restarting the app will make it use the replacement PDF.

