



User Manual

pDoc Pro SDK Server

Version 3.1

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1.0 – The pDoc Pro eSign Software System Overview

1.1 – System Description

The pDoc® Pro eSign SDK provides an electronic signature solution for environments where a system operator pushes a PDF document from their PC to a client for signing or annotating. The pushed document can be a form, contract, or other document for a user to complete and sign/annotate. The user completes a document by filling in text boxes, selecting check boxes and radio buttons, selecting items from lists, and/or signing/annotating the document. When the user has finished and taps a done button icon, the client sends the completed document back to the pDoc Pro Server PC where it is stored and available to the operator. Then the client goes back to sleep, playing a video or displaying a sequence of images, until it receives another document for signing/annotating.

1.2 – System Components

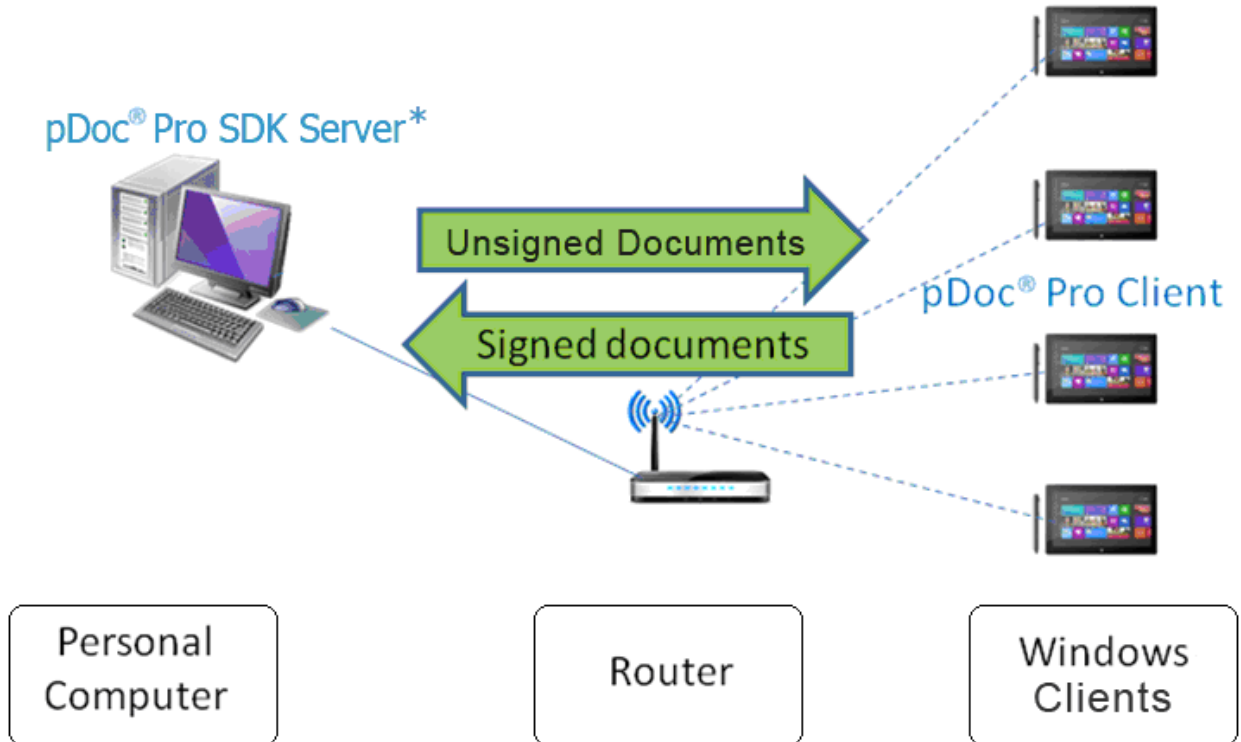
The pDoc Pro eSign Software System comprises:

- One or more pDoc Pro Clients. Each pDoc Pro Client comprises a hardware platform component and an application software component.
 - The pDoc Pro SDK system supports the following hardware platforms:
 - Windows PCs, for example,
 - A Windows tablet on which you can sign or annotate a document
 - A Windows desktop or laptop with an attached electronic signature pad or Tablet Display such as the Topaz GemView 7, GemView10, or GemView 16 for collecting a handwritten signature for signing or for capturing pencil annotations. (Note that other manufacturers may use different names for tablet displays, e.g., pen displays.)
 - Apple iPads, either with or without a stylus
 - Android tablets, either with or without a stylus

- For each hardware platform there is a corresponding application software package:
 - For Windows PCs, the pDoc Pro Client software application may be downloaded here:
www.topazsystems.com/software/_pdoc/pdocproclient.exe
 - For Apple iPads, the pDoc Pro Client software app may be downloaded from the Apple App Store.
 - For Android tablets, the pDoc Pro Client software app may be downloaded from the Google Play Store.
- One or more pDoc Pro SDK Servers. The components of a pDoc Pro SDK Server are:
 - A Windows PC
 - The pDoc Pro SDK Administrator Demo Software
 - The pDoc Pro SDK Manual Originator Demo Software (Demo 1 and Demo 2)
 - The pDoc Pro SDK Automatic Originator Demo Software
 - The pDoc Pro Server SDK

1.3 – System Architecture

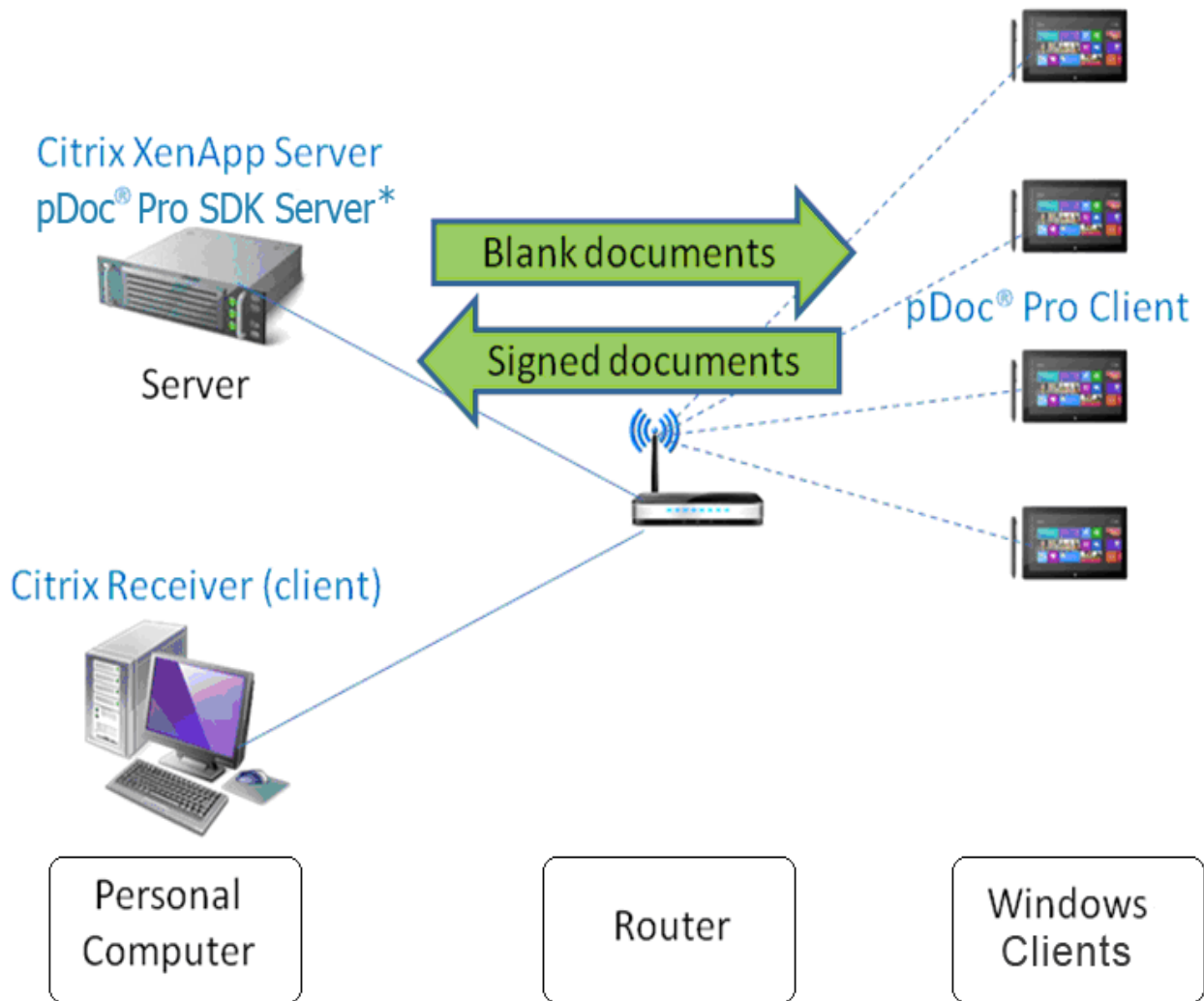
In the standard configuration shown below, the pDoc Pro SDK Server software runs on a desktop PC and pushes blank documents to the clients (Windows tablets in this example) and receives signed/annotated documents back from the clients. The network connections can be wired or wireless; the host PC and 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 SDK Server comprises the Administrator and Originator functions

pDoc Pro eSign Software System Standard Configuration

In the Citrix configuration shown below, the pDoc Pro SDK Server software runs on a Citrix Xen App Server and pushes blank documents to the clients and receives signed/annotated documents back from the clients. The person using the server software uses a Citrix client PC 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 SDK Server comprises the Administrator and Originator functions

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. There are two methods for pushing a document from the server to the client:
 - a. Manual
 - i. Using a Manual Originator user interface, the system operator selects a document for the customer to complete and selects the client device (tablet or PC) the customer will use to fill in and sign/annotate the document.
 - ii. The system operator clicks the Push Document to Client button, which sends the blank document to the client.
 - b. Automatic
 - i. When the Automatic Originator is running, there is no specific action required by the system operator. The Automatic Originator running in background mode constantly monitors a folder (specified in the pDoc Pro SDK Administrator). As soon as a PDF document is dropped into the folder, the Automatic Originator picks it up and pushes it to the client specified for automatic operation in the pDoc Pro SDK Administrator.
2. Filling in and Signing or Annotating the Document on the Client
 - a. Customer uses the pDoc Pro Client Software to fill in form fields and sign/annotate the document on the client.
 - b. Customer taps on the DONE button, which sends the signed/annotated document back to the pDoc Pro SDK Server.
3. Saving the Signed/Annotated Document on the PC
 - a. The pDoc Pro SDK Server Software receives the signed/annotated 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 SDK Server Software to confirm completion of the transaction and receipt of the client (in the case of a tablet) from the customer.
 - c. If the document received is annotated document, an invisible digital signature is added to the document at the Server to track any further changes to the document.

2.0 – pDoc Pro SDK Server Software

The pDoc Pro SDK Server contains the tools to administer a pDoc Pro Client System. Dedicated pDoc Pro Clients are exclusively used for signing or annotating PDF documents and no other applications can be run on the client. When not in use for processing a document, the client displays a video or runs a screen saver. In a non-dedicated pDoc Pro Client, other applications can be run too.

The pDoc Pro SDK Server package contains four parts:

1. The first part of the solution is a Demo Administrator module that allows a system administrator to setup a system, define default values, and update them as required.
2. The second part of the solution, called the Demo Manual Originator application, runs on the same PC as the Demo Administrator and allows the operator of the PC to select a PDF document and then push it to one of the pDoc Pro Clients available in the LAN. There are two Originator Demos that illustrate different ways of using the pDoc Pro Server SDK.
3. The third part of the solution, called the Demo Automatic Originator application, runs in background mode monitoring a user specified folder, waiting for a PDF document to be stored in it.
 - a. When a document is stored in the folder, the Automatic Originator pushes the document to the pDoc Pro Client and displays it.
 - b. The Automatic Originator displays a window to the system operator requesting information to be used in naming the document after it is signed.
4. The fourth part of the solution is the pDoc Pro Server SDK which can be used by third-party applications developers to build their own Administrator and Originator applications, using the Demo Administrator and Demo Originator applications as samples. The third-party application can setup the home screen of the client and push a PDF for signing or annotating to the pDoc Pro Client from within their application using the pDoc Pro Server SDK. The integration guide that describes this SDK and its usage is available as a separate document.

This remainder of this document describes the pDoc Pro SDK Administrator Demo and the pDoc Pro SDK Originator Demos in detail.

3.0 – Installing/Uninstalling pDoc Pro SDK Server

3.1 – Before You Begin

- pDoc Pro SDK Server Software runs on Windows PCs supporting Windows operating systems beginning with Windows 7.
- Your system should have a minimum of 50 MB free space on the hard drive, in addition to the free space requirements for Windows.
- Before installing a new version of pDoc Pro SDK Server, uninstall any older versions of pDoc Pro SDK Server on your machine.
- pDoc Pro Clients may be dedicated or non-dedicated Windows tablets or PCs, Apple iPads and/or Android tablets, either with or without stylus. See the respective Client User Manual for additional information.

3.2 – Installing pDoc Pro SDK Server

Installing pDoc Pro SDK Server software is accomplished by running the pDoc Pro SDK Server installation file (www.topazsystems.com/software/pdoc/pdocproserver.exe). During the installation, you will be provided with an option to agree or disagree to the license agreement, prompted to enter user information, and optionally set a different folder for installation. The sequence of screens displayed guide the user through the installation process.

After installing pDoc Pro SDK Server:

- You can access the pDoc Pro SDK Administrator Demo application using “Start → Programs → pDoc Pro SDK Server → pDoc Pro SDK Administrator Demo”.
- You can access the pDoc Pro SDK Manual Originator Demo applications using “Start → Programs → pDoc Pro SDK Server → pDoc Pro SDK Manual Originator Demo #1” and “Start → Programs → pDoc Pro SDK Server → pDoc Pro SDK Manual Originator Demo #2”.
- You can access the pDoc Pro SDK Automatic Originator Demo application using “Start → Programs → pDoc Pro SDK Server → pDoc Pro SDK Automatic Originator Demo”.

3.3 – Uninstalling pDoc Pro SDK Server

To uninstall pDoc Pro Server:

1. Go to Control Panel → Programs and Features
2. Select pDoc Pro SDK Server
3. Click on the “Uninstall” or “Remove” button, and follow the instructions to uninstall the software.

Note: Deleting the pDoc Pro SDK Server installation folder directly will not uninstall the software completely.

4.0 – pDoc Pro SDK Administrator Demo

The pDoc Pro SDK Administrator Demo allows a system administrator to setup a system, define default values, and update them as required. The system administrator can define the list of clients that are accessible by the Originator Demo applications, configure the home screen of a pDoc Pro Client, and setup the defaults for the signing/annotating application on the pDoc Pro Client. Typically, the Administrator is used to do initial system setup, and then is used only occasionally after that.

4.1 – Specifying System Options

4.1.1 – *Specifying Client Usage*

In this section, the user can specify if the pDoc Pro Client will be used to sign or to annotate the 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.

By default, the usage option is Signing. The user can change the client usage option (Signing or Annotating) in the “Client Usage” section. The user can also specify whether the usage can be changed in the Manual Originator applications by selecting or unselecting the option “Allow Originator to select usage”.

4.1.2 – *Adding Clients to the System*

The first step in setting up a system is to configure the clients to which the Originator can push documents for signing or annotating. The software on the clients (pDoc Pro Clients) should be loaded and run first, so the Administrator can communicate with those clients. Configuring the list of clients is a semi-automated process.

In the System tab of the pDoc Pro SDK Administrator Demo, click on the “Detect pDoc Pro Clients” button. This action broadcasts a message on the network which identifies the pDoc Pro Clients that are ready to accept documents from the Server for signing or annotating.

The Client's Friendly Name with IP Address, Status, Port Number, signing session timeout period for the client (the default time period is 10 minutes and the value should be between 5 and 300 minutes), and ability to sign using an external signature pad (the default value is not allowed) are added to the "Clients available for Originator to use" list, as shown in the screenshot below.

pDoc Pro Clients may also be configured manually. Enter the IP Address in the "Client IP Address" text box and click on the "Manually Add New pDoc Pro Client" button; pDoc Pro SDK Server sends a message to the client. If the client is detected, then the client is added into the "Clients available for Originator to use" list with an "Available" or "Busy" status in the Administrator and in the configuration file. If the client is not available, then the client is added into the "Clients available for Originator to use" list with a "Manual" status in the Administrator and in the configuration file with the tag name as "UnDetectedClient"; such clients are not shown in the detected client list wherever they are shown in both Administrator and Manual Originator Demo applications.

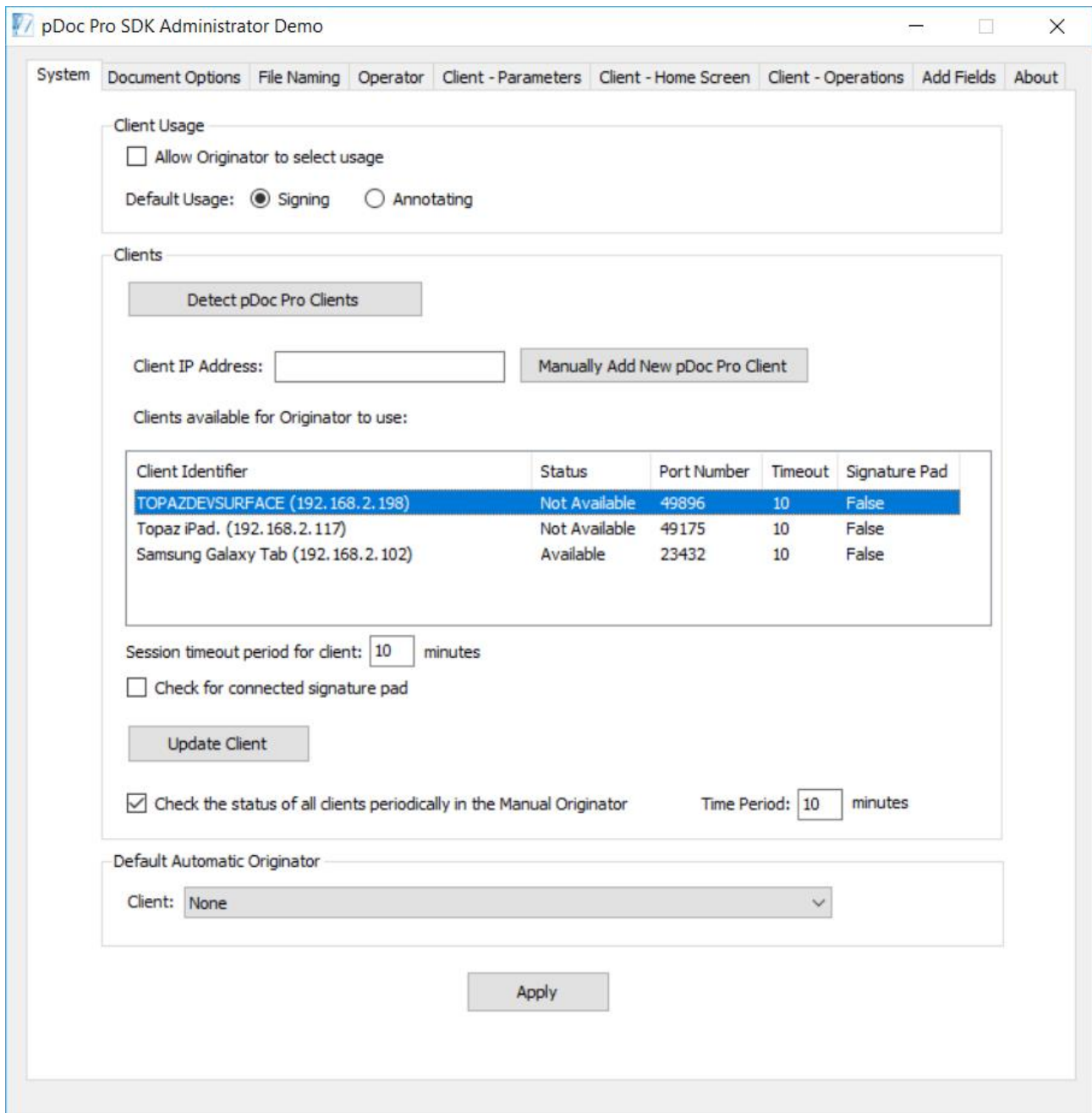
When you click on the "Detect pDoc Pro Clients" button, the clients with "Manual" status are identified along with the normal clients on the network. These identified clients are updated in the "Clients available for Originator to use" list with status ("Available" or "Busy") and also in other client lists in both the Administrator and Manual Originator Demo applications.

The special characters (\ / * ? : " < > |) will be replaced with "%" in the Client friendly name during client detection. The status of each existing client is displayed in the "Clients available for Originator to use" list when the Administrator Demo application is opened.

To check the status of existing clients and look for new clients periodically in the Manual Originator, select the check box "Check the status of all clients periodically in the Manual Originator" and enter the time period in the text box provided. The default time period to check status is every 10 minutes. The time period specified should be between 5 and 60 minutes. The status of any new clients added in the Administrator Demo while an Originator application is running will be checked and updated by the Originator as well.

NOTE: pDoc Pro SDK Server treats the IP address received from a Client as a static IP address, and it uses that IP address for all communications with the Client. Many LANs use DHCP, which may change Client IP addresses from time to time. If the IP address of a Client changes, then the Server will not be able to communicate with the Client; if a signing session is in progress on a Client when its IP address changes, the Server will not be able to communicate with it, and the session will "hang" until it is terminated (in which case the document signed on the Client is lost).

In this case, the administrator will have to have to detect new pDoc Pro Clients as described above to discover the Client's updated IP Address and Port Number. To prevent IP address changes and avoid this problem, the IP address of the client should be reserved in the network's DHCP address pool. To accomplish this, follow the instructions in **Appendix 1** "Reserving a Client IP Address to Prevent Dynamic IP Address Changes".



4.1.3 – Deleting a Client from the List

To delete a client from the list, select the client on the Client list and then right click on it. A menu will open up with a “Delete Client” option; clicking on that removes it from the list after a confirmation from the system administrator. See the screenshot below.

pDoc Pro SDK Administrator Demo

System | Document Options | File Naming | Operator | Client - Parameters | Client - Home Screen | Client - Operations | Add Fields | About

Client Usage

Allow Originator to select usage

Default Usage: Signing Annotating

Clients

Detect pDoc Pro Clients

Client IP Address:

Clients available for Originator to use:

| Client Identifier | Status | Port Number | Timeout | Signature Pad |
|------------------------------------|---------------|-------------|---------|---------------|
| TOPAZDEVSURFACE (1) | Not Available | 49896 | 10 | False |
| Topaz iPad. (192.168.2.102) | Not Available | 49175 | 10 | False |
| Samsung Galaxy Tab (192.168.2.102) | Available | 23432 | 10 | False |

Session timeout period for client: minutes

Check for connected signature pad

Check the status of all clients periodically in the Manual Originator Time Period: minutes

Default Automatic Originator

Client:

NOTE: Automatic client detection only works when both the client and server are on the same network and on the same subnet. Another factor affecting client and server communications is IP port mismatch. This occurs when pDoc Pro Client is reinstalled after being detected by the server. In this case, delete the client entry from the server list and detect clients again. Sometimes the detection function may have to be repeated to find all the active pDoc Pro Clients on the network.

4.1.4 – Update the Information of a Client

The user can update the signing session timeout and checking for external signature pad for individual clients. To change either of these values, select a client from the list. When the user selects a client in the list, the signing session timeout value is displayed in “Session timeout period for client” text box and the checking for external signature pad option value is displayed in “Check for connected signature pad” checkbox (if the option is “True”, the checkbox is checked, and if the option is “False”, the checkbox is unchecked). The user can change and save the updated values by clicking on the “Update Client” button.

4.1.5 – Automatic Originator Client Selection

When using the Automatic Originator application, since the signing/annotating process is initiated as soon as a document is copied into the monitoring folder, there is no option to select a client; hence, you must select a default client to use the Automatic Originator.

The user can select the default client for the Automatic Originator application by selecting the client from the “Client” list in the “Default Automatic Originator ” section. The selected client is saved by clicking on “Apply” button. By default, “None” is selected in the client list.

4.2 – Specifying Document Options

4.2.1 – Document Locations

The completed or incomplete PDF documents that are transferred from the Client to the Server PC are stored in a specified storage path. This storage path can be changed by clicking on the “Browse” button and selecting the desired location.

The folder for monitoring PDF documents for the Automatic Originator can be specified here. The path can be changed by clicking on the “Browse” button and selecting the desired location.

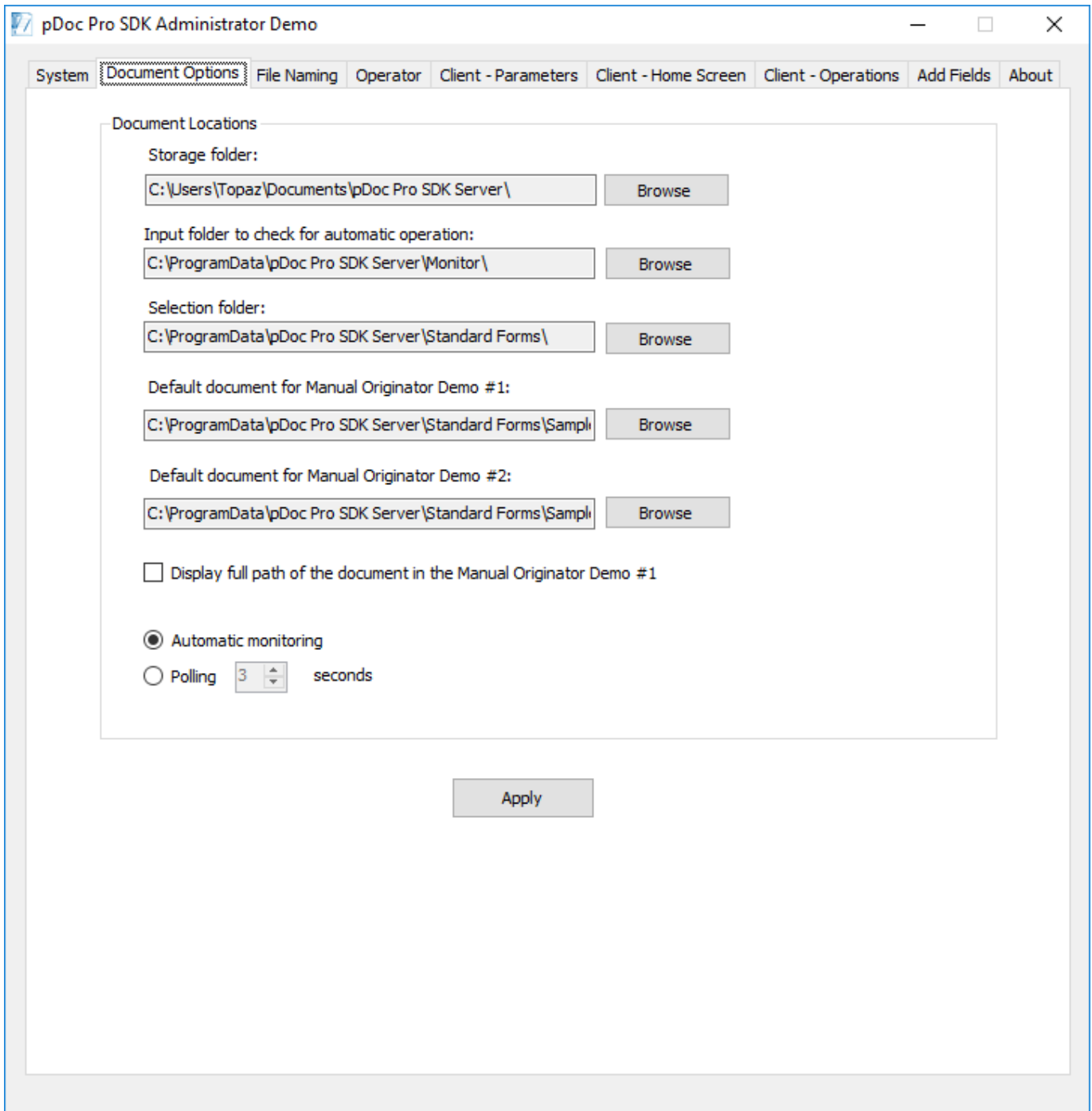
The default folder for selecting PDF documents to push from the PC to Clients can be specified here. The path can be changed by clicking on the “Browse” button and selecting the desired location. When the Originator clicks the “Browse” button in the Originator application to browse for a PDF, the operator, by default, is prompted to select a PDF from the folder specified here.

The default PDF documents to be used in Originator Demo #1 and Demo #2 can be configured here. The default PDF document can be changed by clicking on the “Browse” button and selecting the desired PDF document.

Select “Display full path of the document in the Originator Demo #1” to display the full path of the PDF document that is transferred from the PC to the Client in Demo #1. By default, only the document name is displayed.

When the administrator selects “Automatic monitoring”, the PDF document will be picked up from the monitoring folder automatically, after a PDF document has been copied into the monitoring folder.

When the administrator selects “Polling”, the Automatic Originator will poll the specified folder at the given time intervals; if it finds a PDF document, it will pick it up and push it to the client. The default time interval for polling the folder is 3 seconds. The minimum and maximum time interval allowed to poll the folder is 1 to 10 seconds.



4.3 – File Naming Options

The File Naming tab of the pDoc Pro SDK Administrator demo allows the administrator to specify the file naming convention for the signed or annotated documents when they are received from a pDoc Pro Client. The files can be named with the information provided by the originator during the session, or the administrator can specify a standard name for each signer. The administrator can select “Operator enters information for each signer” or “Use standard name for each signer”.

When the administrator selects “Operator enters information for each signer”, they can specify the names for one to three fields of information to be collected during the signing session, e.g., “First Name”, “Last Name”, and “Room Number”.

When the administrator selects “Use standard name for each signer”, they can specify whether to “Use original document name” or specify the document name to be used in each file name, e.g., “Guest Agreement”.

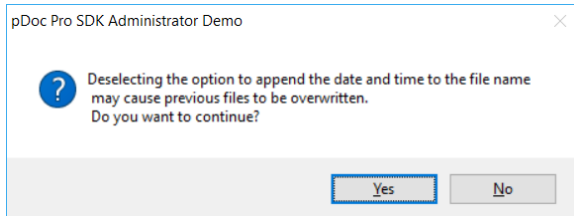
When the administrator selects “Use standard name for each signer”, they can also specify whether to allow addition of text specified by the operator to the document name by selecting “Add operator specified text to document name”. The administrator can also specify if the addition of text to the file when pushed from the Originator to the pDoc Pro Client is required or optional. When set to required or optional, a text box is displayed in the Originator to enter additional information for the document name before pushing it to the pDoc Pro Client. For example, the originator can enter the last name of the signer or the time of day to make the session unique and readily identifiable.

The administrator can specify the maximum length of the text allowed and can specify if the text is to be appended or prepended to the document name. The default value of the maximum length of the text is 10 (i.e., 10 characters are allowed). The maximum length of the text allowed should be between 1 and 50. The maximum number of characters allowed is displayed in the Originator when it is opened.

For both the options, “Use standard name for each signer” and “Operator enters information for each signer”, the date and time of the completion of the signing session are appended to the document name when saving the document in the storage folder if the option is selected as explained in the next paragraph. After selecting the option “Operator enters information for each signer”, if the information required is not provided, the original file name appended with the date and time will be used when saving the document in the storage folder if the option is selected as explained in the next paragraph.

The option “Append the date and time to the file name” allows the administrator to specify that the date and time of the signing session should be appended to the name of PDF document before storing the document in the storage path. The default is that the date and time are appended to the document name.

When the administrator deselects the option, a message will pop up as shown below.



When the administrator accepts it, the PDF document will be stored with the original file name in the storage folder path during the signing session. If a PDF document with the same name already exists in the storage folder, the PDF document will be overwritten with the newly signed document.

pDoc Pro SDK Administrator Demo

System | Document Options | **File Naming** | Operator | Client - Parameters | Client - Home Screen | Client - Operations | Add Fields | About

Use standard name for each signer

Use original document name

Use this document name (max 50)

Add operator specified text to document name

Required Optional

Maximum length of text field :

Position In Document Name

Append Prepend

Operator enters information for each signer

Fields required to name the file

Field 1: (max 15)

Field 2: (max 15)

Field 3: (max 15)

Append the date and time to the file name

4.4 – Operator Options

4.4.1 – Document Printing

In the Document Printing section, select the printing options for the completed document. The default is “Ask Operator about printing completed document”. This option specifies that the Operator should be prompted about printing the completed document when it is received from the pDoc Pro Client. Selecting “Always print completed document” proceeds to print the document without any confirmation prompt for the Operator; it displays the print options screen directly so the operator can select the pages to print. Select “Never print completed document” to specify that the signed or annotated document received from the pDoc Pro Client should not be printed.

To hide the print dialog before printing, unselect the option “Display print dialog before printing”. When this option is unselected, all the pages of the document are printed automatically without a prompt to select the pages. The print options specified here are applicable to both the Manual Originator and the Automatic Originator.

4.4.2– Operator Confirmation

In the Operator Confirmation section, select the operator confirmation option for the Automatic Originator. The default is the automatic operation “Do not display operator confirmation window, and confirm automatically”. This option does not display an operator confirmation window when the Automatic Originator sends a document to a client and it will automatically confirm the completion of the signing process.

Selecting the “Display operator confirmation window, and require manual operator confirmation” option requires the operator to manually close the confirmation dialog that is displayed when the document is pushed to the client for signing and the signer has completed the act-of-signing.

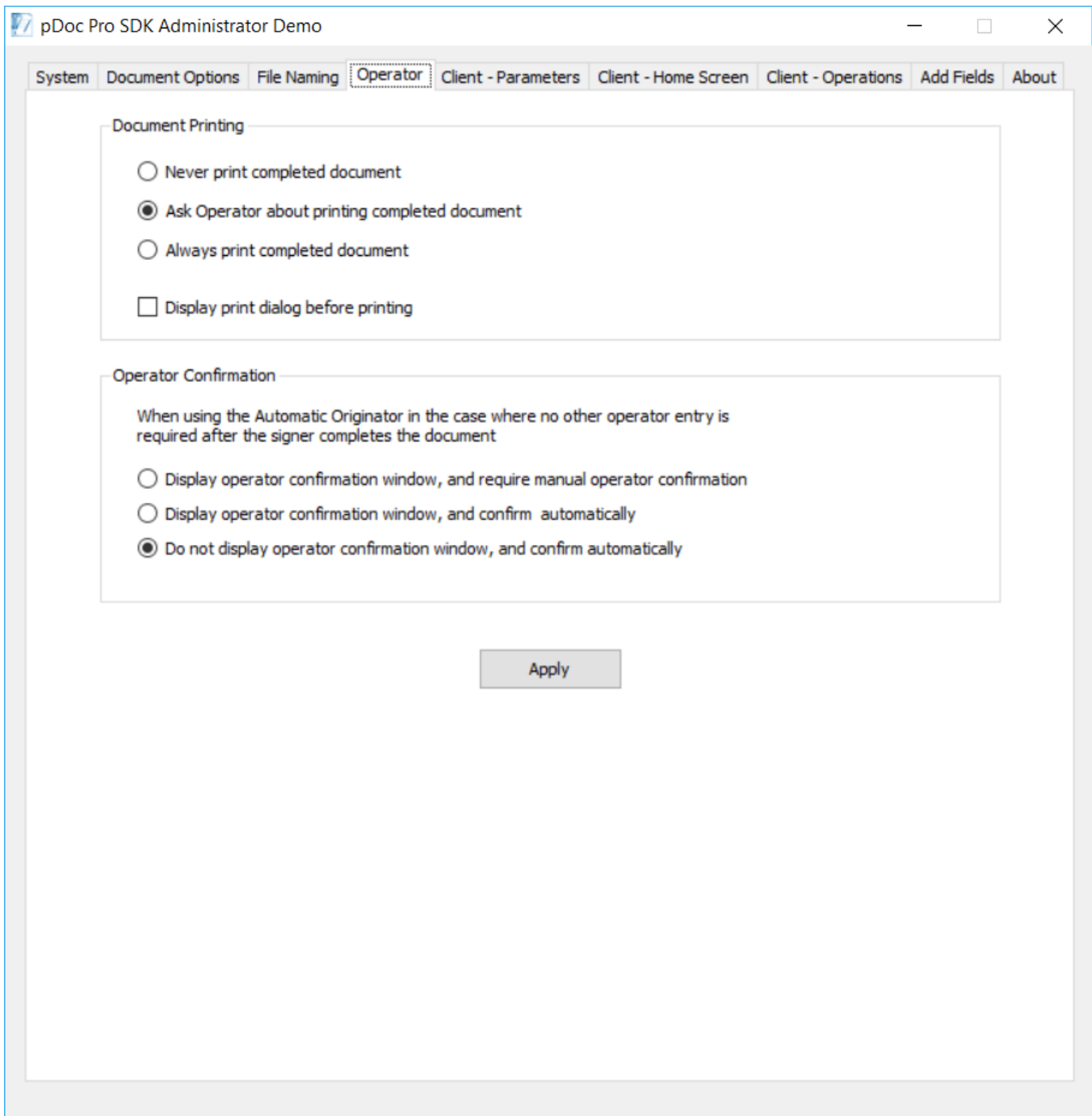
Selecting the “Display operator confirmation window, and confirm automatically” option will display a message when the Automatic Originator pushes a document to a client, but it will automatically confirm the completion of the signing process. The purpose of this feature is to automatically close the confirmation dialog that is displayed when the document is pushed to the client for signing and the signer has completed the act-of-signing. This allows the system to act in unattended mode and everything happens seamlessly without any user intervention. If this automatic confirmation option is selected, the system will not display the “Confirm Save” button and after the document is received from client, pDoc Pro Server updates the window to say “User has tapped the DONE button. Document has been saved automatically.” The confirmation window closes automatically 2 seconds after displaying this message.

Selecting the “Do not display operator confirmation window, and confirm automatically” option will cause the Automatic Originator to not display an operator confirmation window and to

automatically confirm the completion of the signing process. The purpose of this feature is to avoid showing any information about the act-of-signing that is being conducted on the client. This allows the system to act in unattended mode where the operator is not interested in seeing any status information.

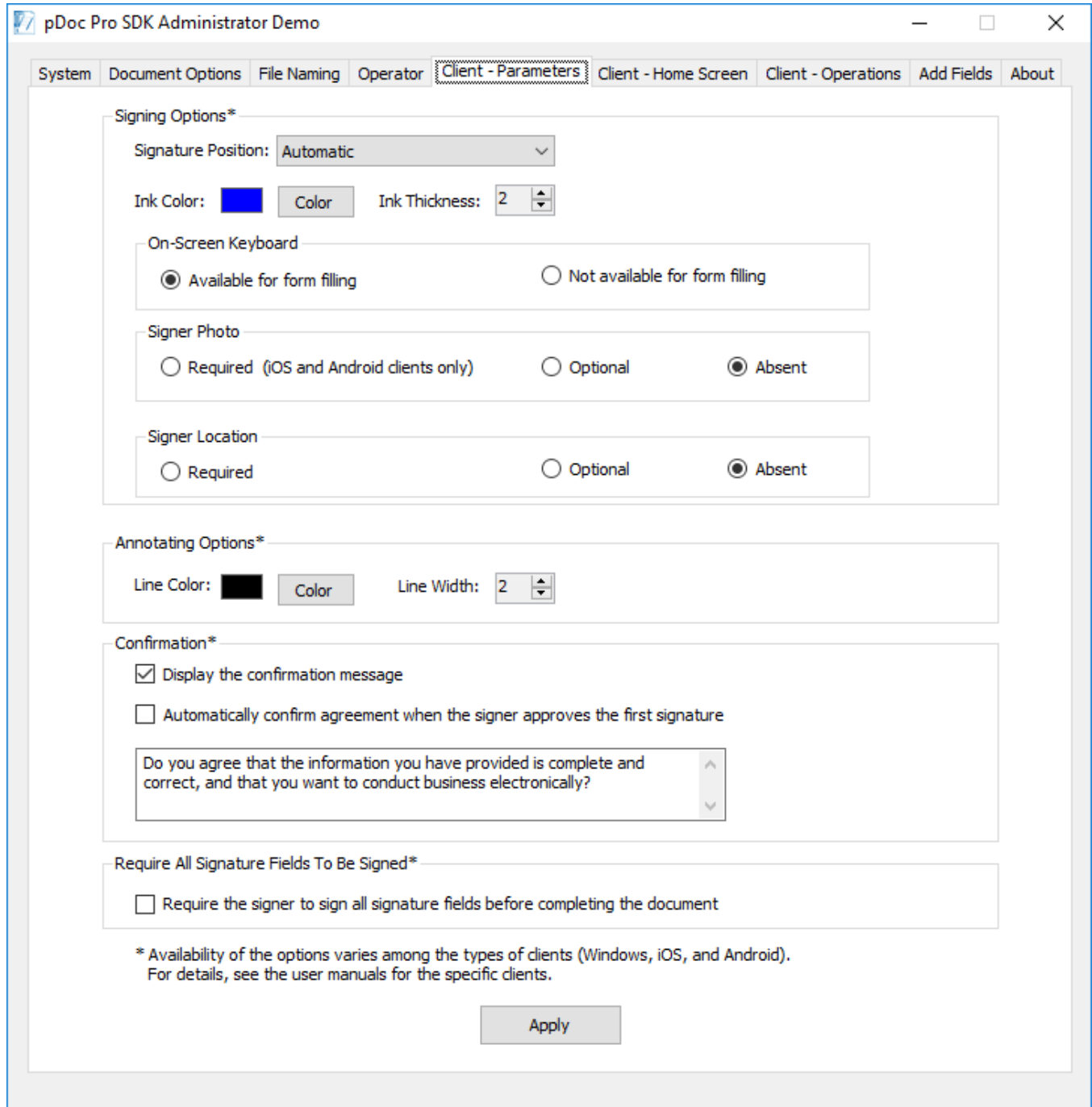
If an automatic confirmation option is selected, the document is automatically printed if either "Ask operator about printing signed document" or "Always print signed document" is selected. If an automatic confirmation option is selected, the manual file naming options are ignored as well. The document will be saved with its original file name with the date and time appended to it, when the "Append the date and time to the file name" option is selected. When the "Append the date and time to the file name" option is unselected, the document will be saved with its original file name.

A screenshot of the "Operator" tab is shown below.



4.5 – Specifying Client Parameters Options

A screenshot of the “Client - Parameters” tab is shown below.



4.5.1 – Specifying the Signing Options

This section of the Client - Parameters tab allows the system administrator to specify the parameters to be used during signature capture in the pDoc Pro Client application.

1. Signature position with respect to the signature details (date, time, etc.). The available options are
 - a. “Behind”, the signature details appear behind the signature image in the document.
 - b. “Beside”, the signature details appear beside the signature image in the document.
 - c. “Image Only”, only the signature image appears.
 - d. “Automatic”, the signature details will be displayed either beside or behind the squiggle depending on the width and height of the signature field.
2. The ink color to be used while capturing the signature and while embedding the signature on the PDF document.
3. The ink thickness to be used while capturing the signature and while embedding the signature on the PDF document.

After specifying all the desired parameters, click on the “Apply” button to save the changes.

4.5.2 – On-Screen Keyboard Options

This section of the Client - Parameters tab allows the system administrator to specify if the On-Screen Keyboard should be made available to the signer during form-filling. Select the option “Available for form filling” if it should be enabled, otherwise select the option “Not available for form filling”.

When the On-Screen Keyboard is displayed for the first time when a Tablet Display is connected to the client PC, it is displayed on the main monitor and not on the Tablet Display. The system operator can move the keyboard manually to the Tablet Display. Subsequently, when the On-Screen Keyboard is invoked, it is displayed on the Tablet Display if it is connected.

If the Tablet Display being used is the GemView 7 Tablet Display, when the On-Screen keyboard is displayed a part of it may be displayed on the main monitor while the major part is on the Tablet Display. The On-Screen Keyboard can be resized and then moved to the Tablet Display as required.

4.5.3 – Signer Photo Options

This section of the Client – Parameters tab allows the system administrator to specify if the Signer Photo should be captured during the signing process. The default is the “Absent” option. When a document is pushed to the Client for signing and when the “Required” option is selected, the signer must capture the photo along with the signature during the signing process. When the “Optional” option is selected, the signer has an option for capturing the photo during the signing process. When the “Absent” option is selected, the signer does not have an option for capturing the photo during the signing process.

4.5.4 – Signer Location Options

This section of the Client – Parameters tab allows the system administrator to specify if the Signer Location should be included during the signing process. The default is the “Absent” option. When a document is pushed to the Client for signing and when the “Required” option is selected, the signer must include the location along with the signature during the signing process. When the “Optional” option is selected, the signer has an option for including the location during the signing process. When the “Absent” option is selected, the signer does not have an option for including the location during the signing process.

4.5.5 – Specifying the Annotating Options

This section of the Client - Parameters tab allows the system administrator to specify the parameters to be used while adding pencil annotations in the pDoc Pro Client application.

1. The Line Color to be used while writing the pencil annotation on the pDoc Pro Client and while displaying the pencil annotation on the PDF document.
2. The Line Thickness to be used while writing the pencil annotation on the pDoc Pro Client and while displaying the pencil annotation on the PDF document. The default Line Thickness is 2. The value can range from 1 to 10.

4.5.6 – Confirmation Message Options

The confirmation message that is displayed on the pDoc Pro Client when the signer or annotator completes the session and taps on the “DONE” button can be modified here. The Administrator can also turn off the display of the confirmation message. This setting is only applicable when the signer taps on the “DONE” button.

After specifying all the desired parameters, click on the “Apply” button to save the changes.

4.5.7 – Automatic Confirmation of the Signer

Use this feature to automatically submit the document to the server when the signer approves the first signature on the client. That is, tapping on the OK button in the signature box after signing is treated as tapping the OK button in the signature box, tapping the DONE button, and tapping the I Agree button.

The confirmation message will be displayed in the signature capture window when the confirmation message option is selected.

This option will take precedence over “Require All Signature Fields To Be Signed” option, when the “Require All Signature Fields To Be Signed” option is selected.

4.5.8 – Require All Signature Fields To Be Signed

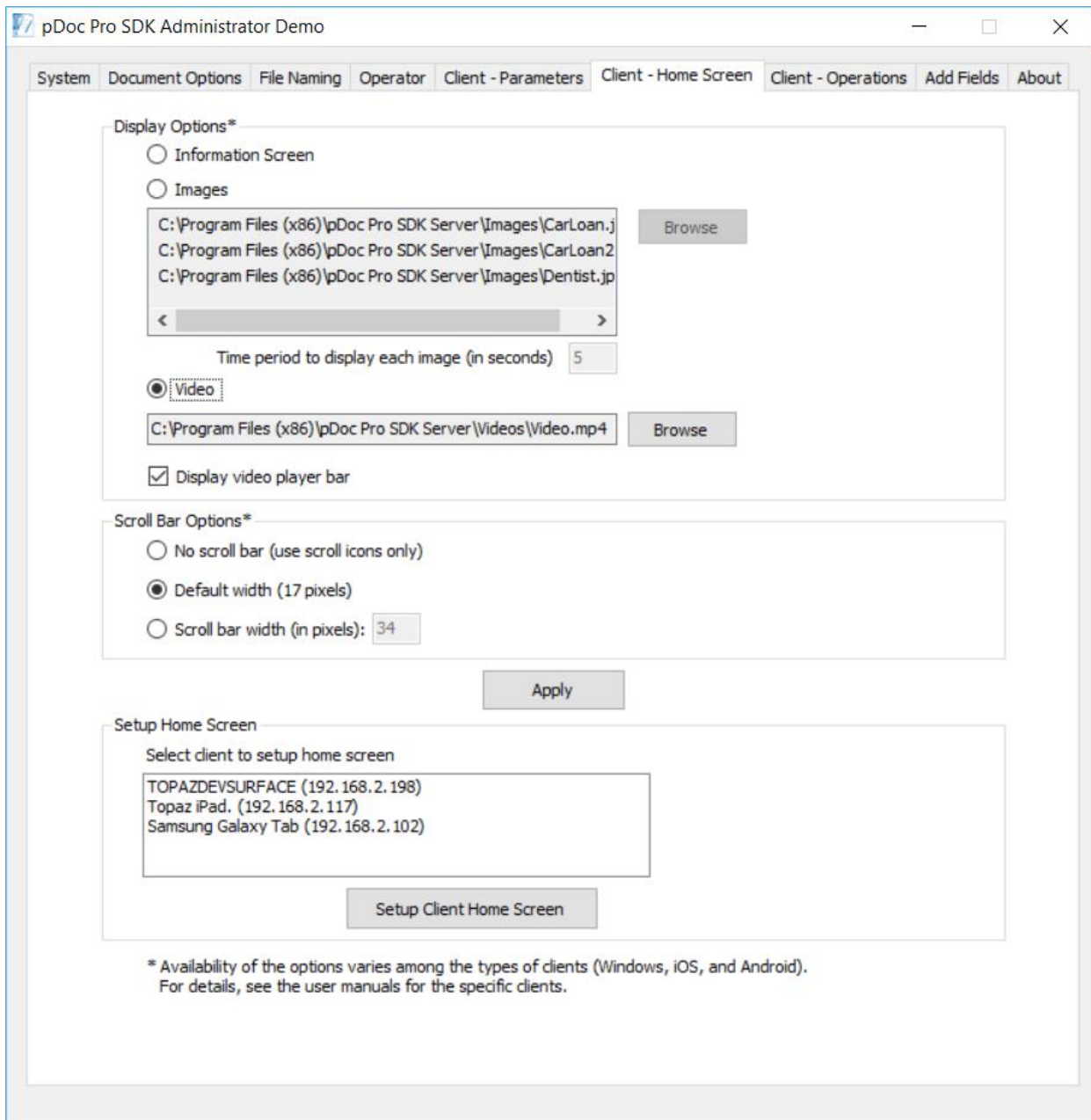
Use this feature to force the signing of all signature fields in the signing session on the Client. By default, the option “Require the signer to sign all the signature fields before completing the document” is set to off.

With this option checked, when a document is pushed to the Client for signing and when the signer clicks on the “DONE” button to indicate the completion of the signing activity, the system will check if all the signature fields in the document have been signed or not. If there are any unsigned fields, the system will prompt a message to sign all the signature fields in the document before tapping on the “DONE” button. The signer cannot complete the signing session until all the signature fields have been signed. Alternatively, the signer can click on the “CANCEL” button to cancel the signing session. In the automatic originator, the system will check if all the signature fields in the document have been signed or not. This feature will exclude the signature fields which are read only in the signing session on the Client.

When both “Automatic Confirmation of the Signer” and “Require All Fields To Be Signed” options are selected, the “Automatic Confirmation of the Signer” option takes precedence over the “Require All Fields To Be Signed” option.

4.6 – Specifying Client Home Screen Options

The Home Screen on a pDoc Pro Client is the screen that is displayed when the pDoc Pro Client is in the idle state, i.e., when it is not serving any PDF processing requests. To configure the Home Screen for a client, select the tab Client – Home Screen.



4.6.1 – Specifying the Home Screen Display

The home screen of a pDoc Pro Client can display an information screen (showing the client IP Address), can display images continuously, or run a video continuously. The default home screen type can be selected during the installation of pDoc Pro Client.

The home screen display type can be updated by the system administrator using this section.

4.6.1.1 – Information Screen Option

Click the Information Screen radio button to select the option to display the information screen on the client.

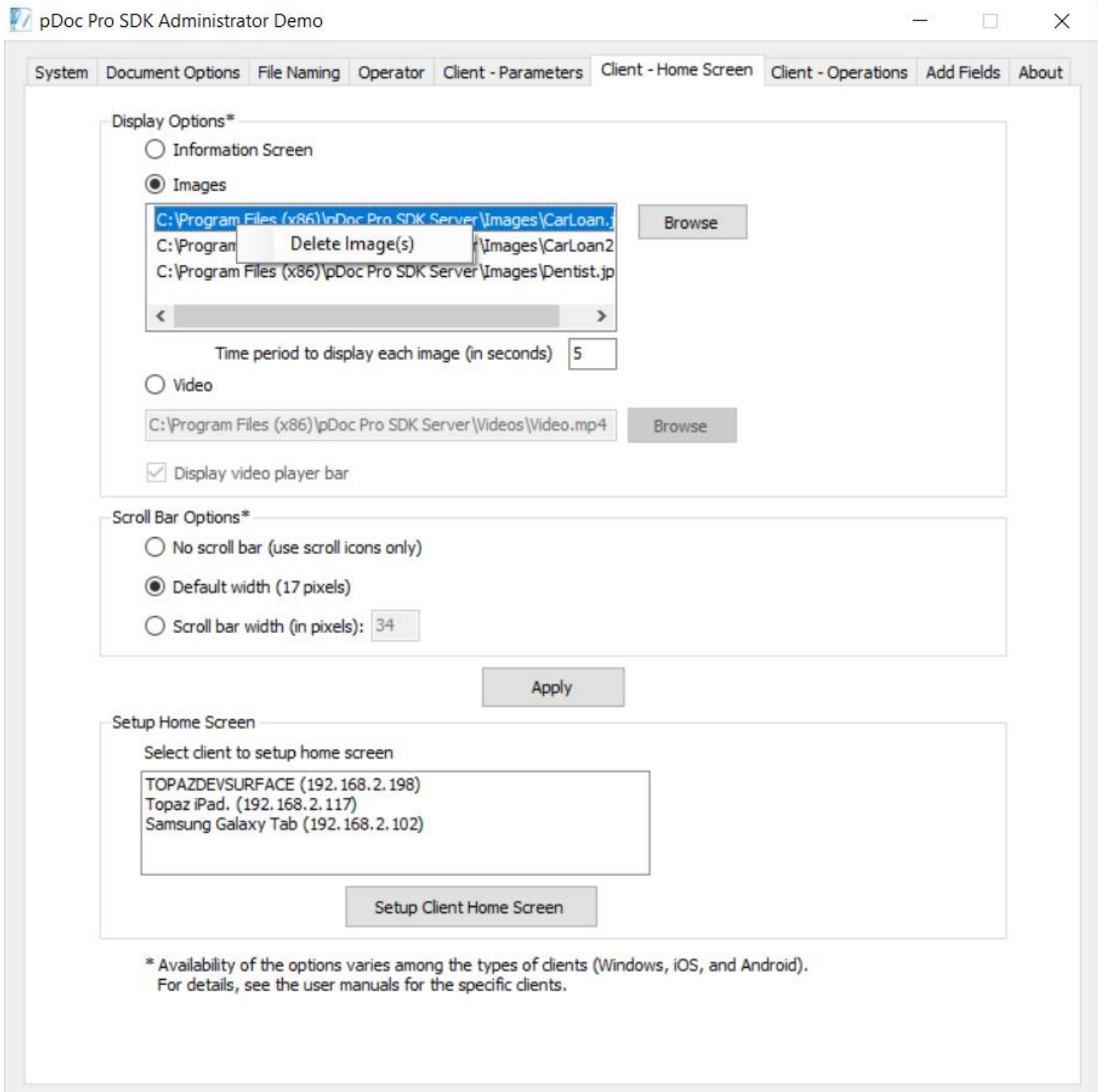
4.6.1.2 – Images Option

Click the Images radio button to select the option to continuously display a set of images on the client.

The System Administrator can specify the selected images that are displayed continuously on the client and specify the time period to display each image.

Images can be selected by using the “Browse” button located next to the images list. After you click Browse, navigate to the image you want to add and click on Open, and the image will be added to the list. The image formats that are supported are .png, .jpeg, .jpg, .bmp, .gif, .tif, and .tiff images. A maximum of 10 images can be selected with each image size not exceeding 10 MB.

To delete one or more images from the list, select the images and then right click. A menu will open up with a “Delete Image(s)” option; clicking on that removes the selected images from the selected list after a confirmation.



4.6.1.3 – Time Period to Display Image

The System Administrator can specify the time period each image should be displayed when the home screen is displaying images continuously by entering the number of seconds to display each image in the specified box. The default time period for displaying the images on the client is 5 seconds. The minimum and maximum time periods for displaying images are 1 second and 300 seconds.

4.6.1.4 – Video Option

The System Administrator can specify that a selected video is run continuously on the client home screen.

A video can be selected by using the “Browse” button located next to the video path text box. After you click Browse, navigate to the video you want to use and click on Open, and the newly added video path will be updated in the “Video” text box.

The video formats that are supported for running on the client home screen on the Client are .mp4, .mpeg, .mpg, .3gp, .asf, .m4v, .mkv, .mov, and .wmv videos. The size of the selected video cannot exceed 200 MB.

4.6.1.5 – Display Video Player Bar

The System Administrator can specify if the video player bar should be displayed or not when running on the video in the home screen of the pDoc Pro Client. By default the “Display video player bar” option is checked and it can be checked or unchecked only when the user selects the video option.

4.6.2 – Setting Scroll Bar Options

This section of the Client – Home Screen tab allows the system administrator to specify the options for the display of the scroll bar in the pDoc Pro Client application. Select “No scroll bar (use scroll icons only)” if the scroll bars should not appear in the pDoc Pro Client application while signing or annotating the document. The signer must use the scroll icons available on the top of the window to scroll the document up or down.

Select “Default Width (17 pixels)” if the scroll bar of default width should be displayed. The default width of the scroll bar in Windows is 17 pixels. If the scroll bar width had been manually set to some other number outside of the pDoc Pro SDK Administrator demo, then selecting this option requires a system restart to take effect.

Select “Scroll bar width (in pixels)” to specify a custom width for the scroll bar. The default is 34 pixels and the value can range from 17 – 85 pixels. The value specified here is applicable to all the applications running on the PC and is not specific to the pDoc Pro Client application; hence, selecting this option requires a system restart to take effect.

Changing the selection from “Scroll bar width (in pixels)” to either the “No scroll bar (use scroll icons only)” or “Default Width (17 pixels)” also requires a system restart to take effect. By default, the “Default Width (17 pixels)” is selected.

4.6.3 – Setting up the Home Screen

After selecting the desired changes to the password and display, the system administrator can select a client from the list of available clients and click on the “Setup Client Home Screen” button to setup the home screen for the selected client. A confirmation window will appear, in which you should click Continue to effect the changes to the client. The Administrator software will send the information to the specified client, and present the results of that communication.

4.7 – Specifying Client Operations Options

4.7.1 – Terminate Home Screen Password

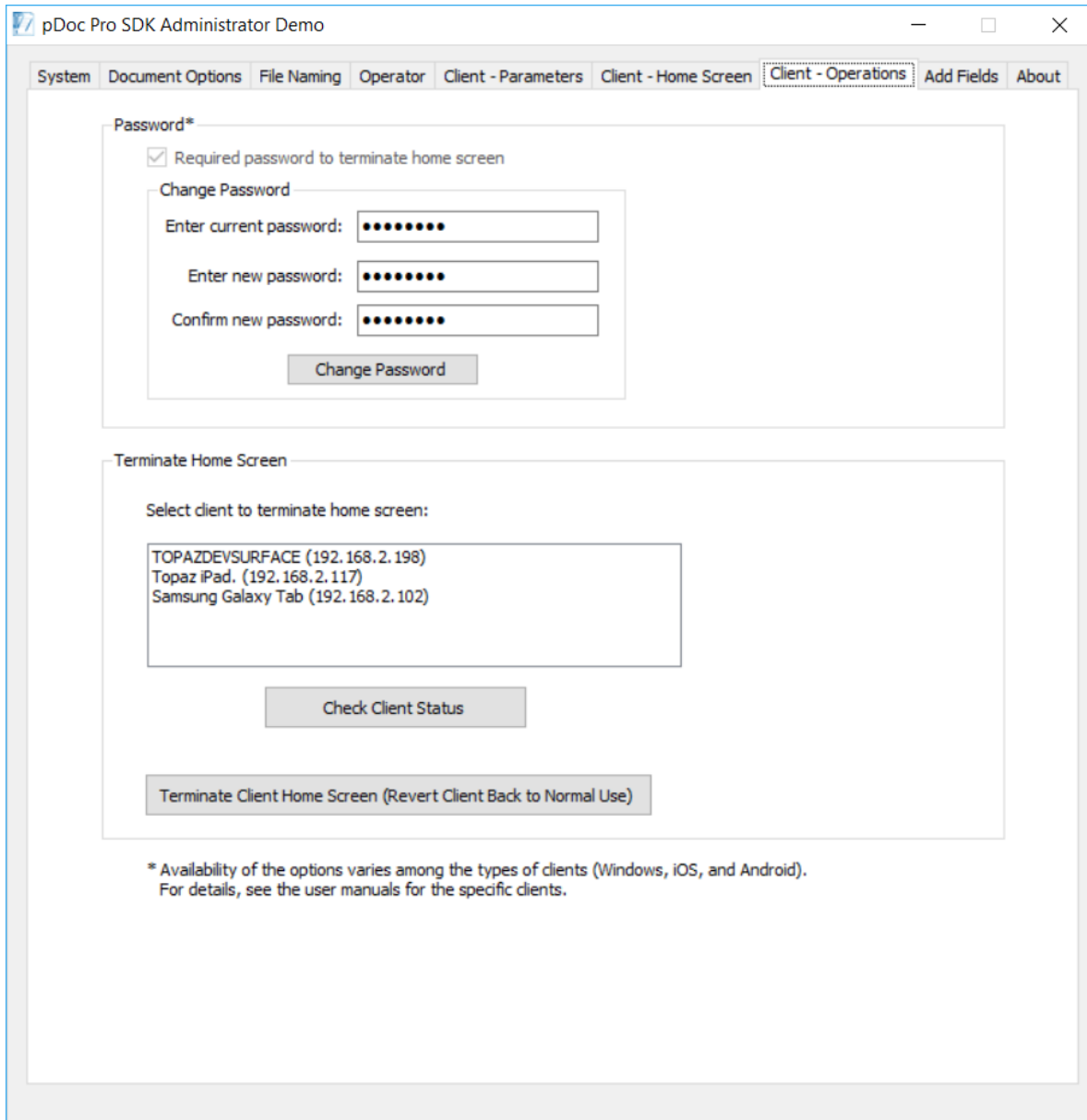
Terminating the client home screen from the home screen itself, i.e., terminating the signing application so that the client can be used in normal client mode, requires a password. The default password if not changed by the system administrator is “pdocsigner”. The password can be changed by providing the existing password and new password in the Password group. The new password is transferred to the client when the home screen is setup. A screenshot of the Signing Client – Home Screen tab is shown below.

4.7.2 – Terminating Client Home Screen

The system administrator can terminate the home screen of a pDoc Pro Client by selecting the client from the list and clicking on the “Terminate Client Home Screen (Revert Client Back to Normal Use)” button. This action will terminate the home screen on the Client and revert the client back to normal use, so that it is not operating as a dedicated pDoc Pro Client.

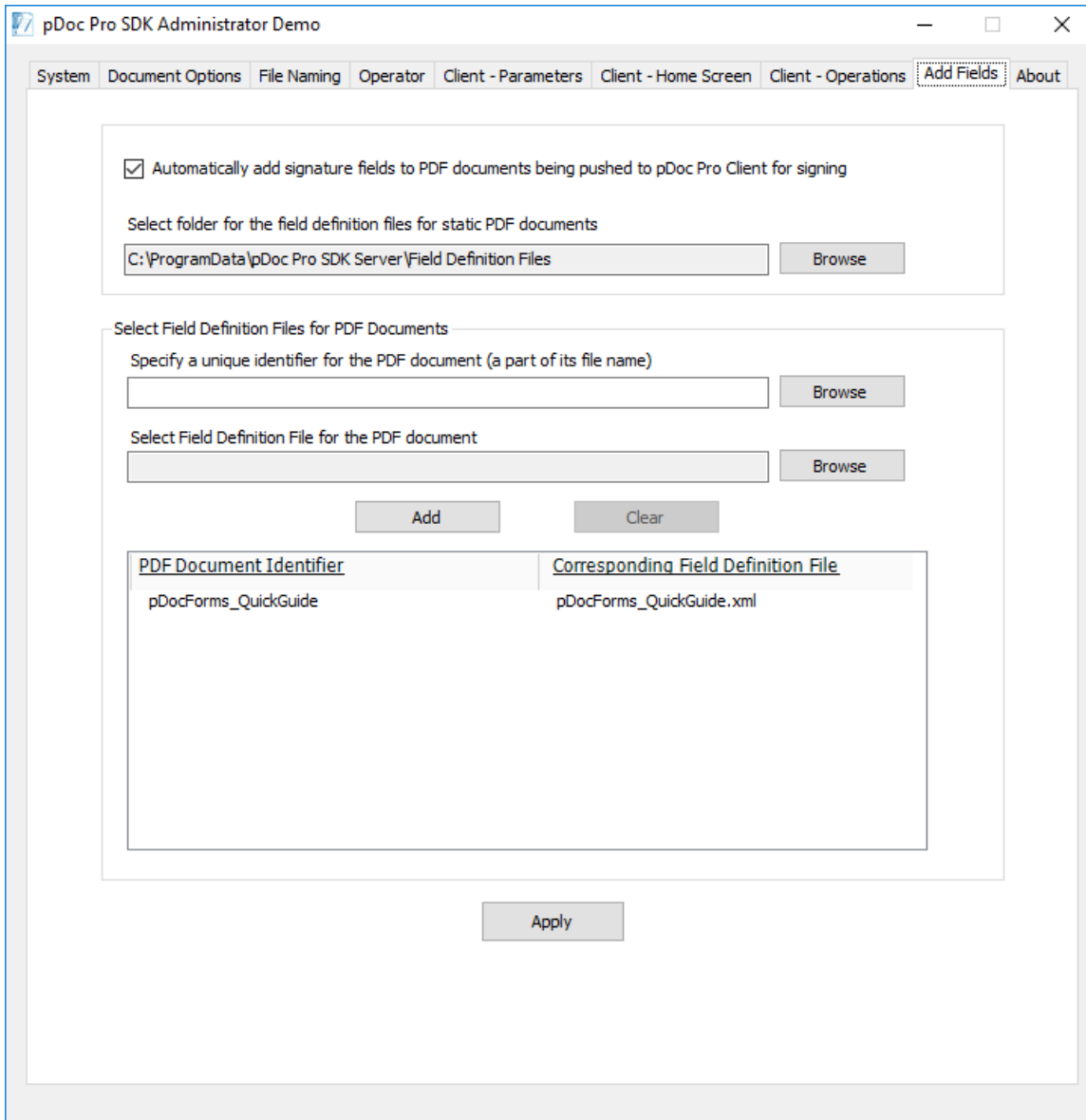
4.7.3 – Checking Client Status

The system administrator can check the status of a pDoc Pro Client by selecting the client from the list and clicking on the “Check Client Status” button.



4.8 – Add Fields

The “Add Fields” tab in the pDoc Pro Administrator allows the administrator to specify that signature fields are to be automatically added to the PDF document before it is pushed to the Client for signing. It also allows the administrator to specify information about the field definition files that describe where the signature fields are to be automatically inserted. This feature is useful in applications where a program creates a PDF file but does not put signature fields in it. For example, PDF print drivers typically create PDF documents that do not contain signature fields, yet system users want to sign the documents created by a PDF print driver.



4.8.1 – Selecting the Option to Automatically Add Signature Fields

Select “Automatically add signature fields to PDF documents being pushed to pDoc Pro Client for signing”, if signature fields should be inserted into the PDF document before it is pushed to the Client for signing. By default, this option is unselected. This option is applicable to both “pDoc Pro SDK Automatic Originator” and “pDoc Pro SDK Manual Originator Demo#1” applications. When this option is selected, pDoc Pro Server uses field definition files to specify where signature fields are to be inserted in corresponding PDF documents.

Select a folder for the field definition files for static PDF documents by clicking on the “Browse” button and then selecting the folder. By default, the path is “C:\ProgramData\pDoc Pro SDK Server\Field Definition Files”. All the field definition files should reside in this folder for static PDF documents. A PDF document is defined as static when the locations of the signature fields are always constant regardless of the data in the document. In a dynamic PDF document, the locations of the signature fields may change from one instance of the document to another.

The signature fields are added according to the page numbers (such as a specified page number (e.g., 3), “ALL”, “LAST” and a page list (e.g., 1,3,4)) specified in the field definition files. If the specified page number is “ALL”, then the signature field is added on all the pages of the document. If the specified page number is “LAST”, then the signature field is added on the last page of the document. If a page list (e.g., 1,3,4) is specified, then the signature field is added on the specified pages of the document.

4.8.2 – Selecting Field Definition Files for PDF Documents

The second section of the “Add Fields” tab is the section named “Select Field Definition Files for PDF Documents”. This allows the administrator to specify the mapping between PDF documents and Field Definition files, i.e., to specify the Field Definition file that is to be used for a specific PDF document.

To create a mapping, first specify a unique identifier for the PDF document (typically the complete file name or a part of its file name) and then select the field definition file for this PDF. Clicking on “Add” will display the mapping in the list below.

If the “Automatically add signature fields” option is enabled, when the originator selects a PDF document to push to the Client (using either the Automatic or Manual Originator), pDoc Pro Server will add signature fields to the PDF document as follows:

1. In the case of a dynamic PDF, the field definition file should have the same name as the PDF and the field definition file should reside in the same folder as the PDF. For example, in the case of the Automatic Originator (described in later sections of this document), both the PDF document and the field definition file should be copied to the Monitor folder.

2. When a static PDF is selected in the Originator for pushing to the Client, pDoc Pro Server searches the list of PDF documents to identify if a field definition file exists for the PDF document; if so, it uses the corresponding field definition file for inserting signature fields into the PDF document before it is pushed. pDoc Pro Server performs the search by checking all the current mappings looking for the first instance of an identifier name being part (or all) of the PDF file name being pushed. When it finds a match, pDoc Pro Server uses the corresponding field definition file. For example, in the screenshot above, the unique PDF identifier “pDocForms_QuickGuide” is mapped to the field definition file “pDocForms_QuickGuide.xml”. If the PDF document selected for pushing to the Client contains the term “pDocForms_QuickGuide” as part of its file name (it can exist in any part of the file name), the field definition file “pDocForms_QuickGuide.xml” is used.

In both the above cases, if no match is found between any of the PDF document identifiers or if the information in the field definition file is insufficient or does not match the PDF document, the document will be pushed to the Client without inserting any signature fields.

4.8.3 – Creating Field Definition Files

Field Definition Files are XML files that define the following information for each signature field to be inserted into a PDF document:

- Location:
 - Page number (i.e., a specific page number, “ALL”, “LAST”, or a list of pages such as “1,2,5”)
 - x and y coordinates in pixels of the upper left corner of the signature field
- Size: width and height in pixels

Topaz Systems’s pDoc Forms Designer software provides an Export function that generates a Field Definition File for static PDF documents. When exporting Field Definition Files from pDoc Forms Designer for use in pDoc Pro, use XML file format Version 2, not Version 4. pDoc Forms Designer can be downloaded for free from the Topaz web site as part of the pDoc Signer software system.

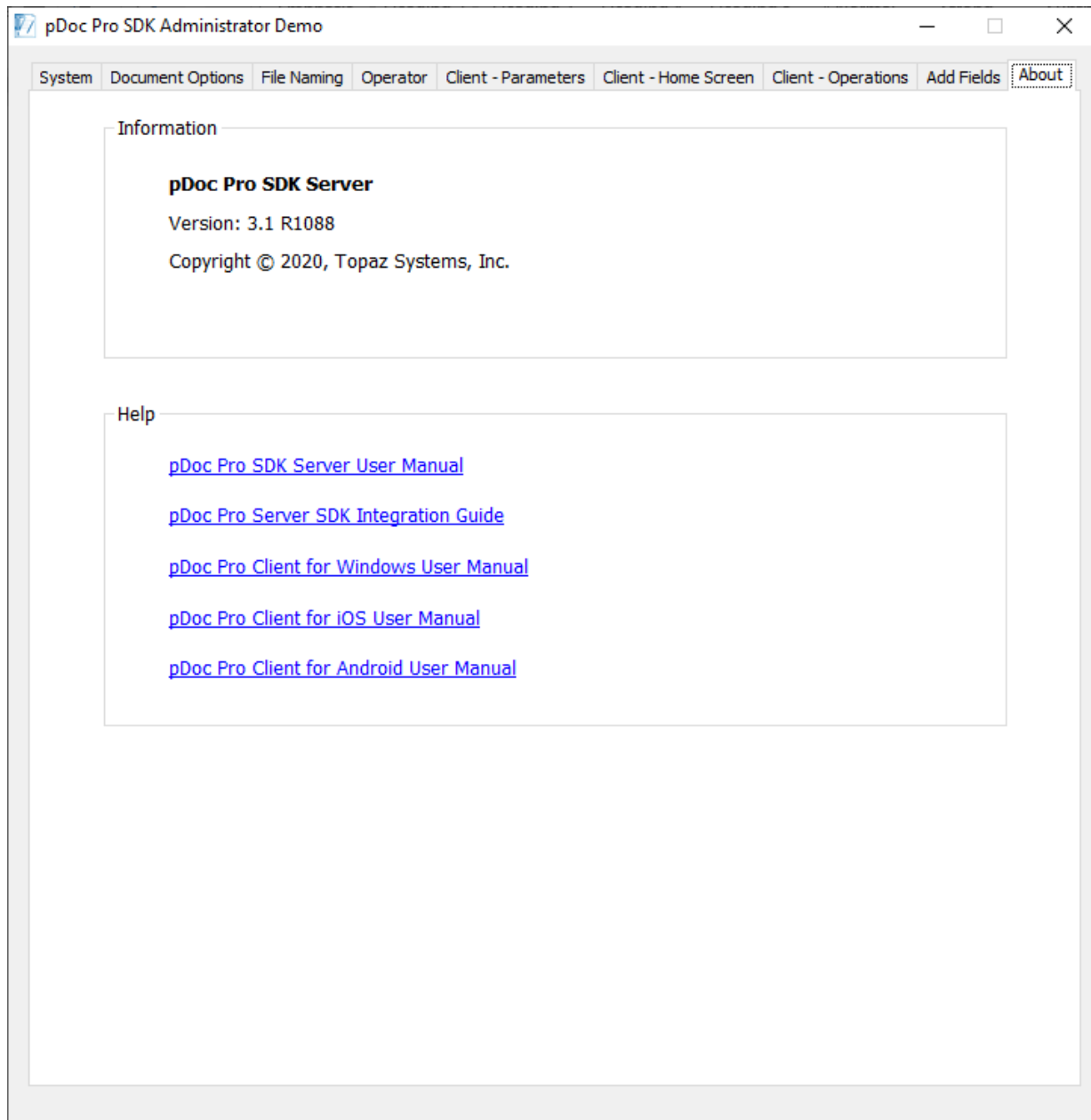
You can create Field Definition Files for dynamic PDF documents by using the same syntax as the XML files exported by pDoc Forms Designer.

Note: For some dynamic PDF documents, it is desirable to insert signature fields on the last page of the document. To specify that a signature field is to be inserted on the last page of a document (regardless of the number of pages in the document), use the word “last” as the page number instead of specifying a positive integer as the page number.

4.9 – About

The “About” tab in the pDoc Pro SDK Administrator demo displays the version details of the pDoc Pro SDK Server that is currently installed on the PC.

The “About” tab also contains a Help section that provides hyperlinks to the relevant user manuals online.



5.0 – pDoc Pro SDK Manual Originator Demo #1

The pDoc Pro SDK Manual Originator Demo #1 Application is the application that resides on the PC of the operator who regularly has people sign or annotate documents. Features supported by this application are:

1. Selecting a PDF document from a predefined list of documents or browsing for another PDF document.
2. Selecting a pDoc Pro Client from the available list.
3. Selecting Client Usage from the option (if enabled by the administrator).
4. Pushing the selected PDF document to the selected pDoc Pro Client for signing or annotating.
5. Terminating the client session on a selected pDoc Pro Client.
6. Receiving the signed or annotated PDF document from the client after it has been signed or annotated by the user, and updating the status of the session in the documents history list.

The pDoc Pro SDK Manual Originator Demo #1 application can be minimized to the taskbar and the user can perform other operations on the pDoc Pro Server machine.

The pDoc Pro SDK Manual Originator Demo #1 has one screen in its user interface, see the screenshot below.

pDoc Pro SDK Manual Originator Demo #1

Select Document

Sample Health History Form Browse

Text to Add to Document Name: (max 10)

Select Client Device

TOPAZDEVSURFACE (192.168.2.198) (Available)
 Topaz iPad. (192.168.2.117) (Not available)
 Samsung Galaxy Tab (192.168.2.102) (Available)

Push Document to Client Terminate Client Session

Documents History Confirm

Select all

| Document | Client | Time | Usage | Original File Name |
|--|---------------------------------|---------------------|---------|--------------------|
| <input type="checkbox"/> Sample Health History Form-D20190311T162257 | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:22:55 | Signing | Sample Health H |
| <input type="checkbox"/> Sample Health History Form (Cancelled) | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:22:34 | Signing | Sample Health H |
| <input type="checkbox"/> Sample Health History Form-D20190311T162202 | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:22:01 | Signing | Sample Health H |
| | | | | |
| | | | | |
| | | | | |

5.1 – Select Document for Signing or Annotating

The originator can select a document for signing or annotating from the list of available documents (previously selected) or can click on the “Browse” button to select a new document. The document list can contain a maximum of 25 documents.

When the document list contains 25 documents and the originator selects a new PDF document using the Browse button, the oldest entry in the list will be removed and this new document will be added to the list.

5.2 – Enter Text to be Appended or Prepended

If set by the Administrator as required or optional, the pDoc Pro SDK Manual Originator Demo #1 displays a text field to enter information in it that will be either appended or prepended to the document name before it is pushed to the client.

Special characters listed below are not supported in this text field:

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)
- ~ (tilde)
- ; (semi colon)

5.3 – Enter Information for File Naming

If the Administrator sets the file naming convention as “Operator enters information for each signer”, the operator must enter the information for each session. See the screenshot below for reference.

Select Document

Sample Health History Form

Browse

Fields Required

First Name:

(max 50)

Last Name:

(max 50)

Room Number:

(max 50)

Select Client Device

TOPAZDEVSSURFACE (192.168.2.198) (Available)

Topaz iPad. (192.168.2.117) (Not available)

Samsung Galaxy Tab (192.168.2.102) (Available)

Client Usage

Signing

Annotating

Push Document to Client

Terminate Client Session

Documents History

Select all Confirm

| Document | Client | Time | Usage | Original File Name |
|---|------------------------------------|---------------------|------------|--------------------|
| <input type="checkbox"/> John-Doe-201-D20190311T162718 | TOPAZDEVSSURFACE (192.168.2.198) | 2019-03-11 16:27:15 | Annotating | John-Doe-201 |
| <input type="checkbox"/> Sample Health History Form (Cancell... | TOPAZDEVSSURFACE (192.168.2.198) | 2019-03-11 16:26:47 | Signing | John-Doe-102 |
| <input type="checkbox"/> John-Doe-101-D20190311T162528 | Samsung Galaxy Tab (192.168.2.102) | 2019-03-11 16:25:27 | Signing | John-Doe-101 |
| | | | | |
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5.4 – Select Client Device

The pDoc Pro SDK Manual Originator Demo #1 displays the clients configured for use by the system administrator. The font of each entry in the client list is color coded along with the status of the client.

- If the client name is displayed in black color along with the status “(Available)” at the end of the client name, the client is “Available” and ready to accept a PDF document from the Originator.
- If the client name is displayed in gray color along with the status “(Busy)” at the end of the client name, the client is “Busy” with another document session and cannot accept PDF documents from the Originator.
- If the client name is displayed in red color along with the status “(Not available)” at the end of the client name, the client is not responding and is not available in the network.
- If the client name contains asterisk (*) at the end of the client name “(Available)*”, the client is configured as the default client for Automatic Originator application.

5.5 – Select Client Usage

If set by the Administrator, the pDoc Pro SDK Manual Originator Demo #1 displays client usage section for changing the client usage option. Before pushing a PDF, the originator can change the usage if required.

5.6 – Refresh Client Status

To refresh the client status, select the client on the “Select Client Device” list and then right click on it. A menu will open up with a “Refresh Client Status” option; clicking on that will refresh the selected client with its current status. See the screenshot below.

pDoc Pro SDK Manual Originator Demo #1

Select Document

Sample Health History Form Browse

Text to Add to Document Name: **(max 10)**

Select Client Device

TOPAZDEVSURFACE (192.168.2.198) (Available)
 Topaz iPad. (192.168.2.117) (Not available)
 Samsung Galaxy Ta Refresh Client Status

Client Usage

Signing
 Annotating

Push Document to Client Terminate Client Session

Documents History

Select all Confirm

| Document | Client | Time | Usage | Original File Name |
|----------|--------|------|-------|--------------------|
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5.7 – Push PDF Documents

The pDoc Pro SDK Manual Originator Demo #1 application pushes a PDF document to a pDoc Pro Client for signing.

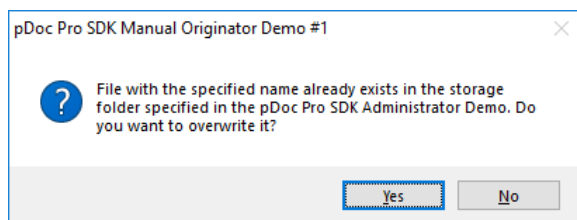
To push a PDF document:

1. Select the PDF document from the “Select Document” list.
2. If required, enter the text to add to the document name.
3. Select the pDoc Pro Client from the “Select Client Device” list to which the PDF document should be pushed.
4. Change the client usage option if it is enabled and you want to change it.
5. Click on the “Push Document to Client” button in the Originator application to push a copy of the selected PDF document to the selected pDoc Pro Client. If the “Automatically add signature fields” option is enabled in the “Add Fields” tab of the pDoc Pro SDK Administrator Demo, signature fields will be inserted into the PDF document before it is pushed to the pDoc Pro Client. Refer to Section 4.8 for more information. The pDoc Pro Client will receive the PDF document and display it to the user for signing or annotating depending on the selected usage option.

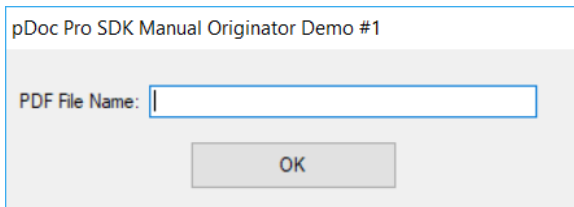
Once the PDF document is pushed to the client successfully, the pDoc Pro Client entry in the client list is colored gray indicating that the client is in the “Busy” state. The Originator software also displays an entry in the Documents History list, showing the name of the document pushed, the client to which it was pushed, and the time it was pushed. The background of the entry is white indicating that the document has been pushed but the completed document has not yet been received.

5.8 – Receiving the PDF Document from the Client

When the signer completes the act of signing or annotating, the signer taps on the “DONE” button in the pDoc Pro Client interface. Tapping on “DONE” button and agreeing to the confirmation message (displayed depending on the setting in the Administrator application) sends the PDF document back to the Originator PC from which the PDF document was pushed. The signed files are named according to the file naming criteria set in the Administrator. If the administrator set the option “Append the date and time to the file name” option, the signed file names are appended with the date and time. When this option is unselected, a confirmation message will prompt as shown below.



If the user disagrees, a prompt will be shown for entering a new file name and the signed document will be stored with the new file name.



Depending on the option set by pDoc Pro SDK Administrator, the system prints the received PDF or prompts the operator about printing.

5.9 – Documents History

The Documents History list contains the list of documents that have been pushed and are being signed or annotated, and documents that have been signed or annotated and received. Each item in the list contains the name of the document, the client to which it has been pushed, and the date/time the Originator pushed the document or received the document. See the screenshot in Section 5.0.

5.9.1 – Documents in Process

The PDF documents that are in process on a client are shown with a white background in the “Documents History” list box. This indicates that the Originator has pushed a PDF document to a client and is waiting for the client to send back the document.

5.9.2 – Signed or Annotated PDF Documents

The PDF documents that are signed or annotated and received are shown with a green background in the “Documents History” list box. This indicates that the signing or annotating process has been successfully completed on the client and the PDF document has been received successfully by the Originator. The PDF document received time will be updated in the time column.

5.9.3 – Incomplete PDF Documents

The PDF documents that are unsigned or not annotated in that session and received are shown with a yellow background in the “Documents History” list box. This indicates that the user has returned the document without signing or annotating it and the PDF document has been received successfully by the Originator. The PDF document received time will be updated in the time column.

5.9.4 – Documents with other statuses

The PDF documents in the “Documents History” list are shown with a red background in the following scenarios:

1. The PDF documents for which the user cancelled the signing or annotating process on the clients. The document name is appended with the text “Cancelled” in this case.
2. The PDF documents for which the originator terminated the signing or annotating process on the clients. The document name is appended with the text “Terminated” in this case.
3. The pDoc Pro Client software license on the client has expired. The document name is appended with the text “Expired” in this case.
4. Some error occurred during display of the document on the client. The document name is appended with the text “Error” in this case.
5. When the client session on the client times out. The time out period is 10 minutes by default. If the originator does not receive the document back in this time, the client session is terminated by the originator automatically. The document name is appended with the text “Timed Out” in this case.

5.10 – Terminate Client Session

To terminate the client session on a client, first select the client and click on the “Terminate Client Session” button in the pDoc Pro SDK Manual Originator Demo#1 application. If the client session in the selected client is running, then the session will be terminated and the Client Home Screen application is activated automatically.

5.11 – Removing the Entries in the “Documents History” List

Each entry in the “Documents History” list has a checkbox at the beginning of the row where it is listed. The originator can choose entries and click on a button named “Confirm” that is present above the list on the right-hand side to confirm that document is received or the appropriate error received. The entries selected in the list are removed from the list. Clicking the “Select all” check box, selects all the entries in the list.

The entries for the documents that have been pushed and have not yet been received are not selectable and cannot be removed from the list.

6.0 – pDoc Pro SDK Manual Originator Demo #2

In many real time workflows and applications, the PDF form to be pushed to a client device for signing or annotating is prepopulated with information, e.g., a signer's name and address, so that the signer does not have to reenter that information. The information that is embedded into the PDF can be captured by different means, such as reading data from a database or getting information entered in a web application. When prepopulated documents are pushed to a client, the form field information is first embedded into the document and then the document is pushed to a client for signing or annotating and updating the information that was captured earlier.

After signing or annotating, when the document is received back by the Originator, the updated form fields information and signature are read from the document and then the database can be updated.

To demonstrate this use case, a demo named pDoc Pro SDK Manual Originator Demo #2 is included in pDoc Pro SDK Server. The pDoc Pro SDK Manual Originator Demo #2 demonstrates the usage of pDoc Pro in enrolling a user for health insurance. This application uses a predefined database (an XML file named SampleDatabase.xml) where the information about 10 users pre-exists. The data in the database also specifies which fields in the document should be made read-only before the document is pushed to the pDoc Pro Client. This database exists in the Common Application Folder of the system. In general, in the latest Windows versions, the database exists in the "C:\ProgramData\pDoc Pro SDK Server" folder. When a filled-in and signed PDF is received back from the client, the information is again updated in this sample database. A copy of the sample database exists in the installation folder. If an evaluator wants to start from scratch, the sample database in the Program Data folder can be replaced by the one in the installation folder.

A sample health insurance enrollment form is installed when pDoc Pro SDK Server is installed, and pDoc Pro SDK Manual Originator Demo#2 uses this PDF form by default. Features supported by this application are:

1. Selecting the signer from the database
2. Automatically populating the PDF document (the health insurance enrollment form) with information from the selected record in the database
3. Selecting a pDoc Pro Client from the available list
4. Select the client usage option (if enabled by the administrator)
5. Pushing the enrollment form to the selected client for updating information and signing (accomplished by clicking on the Enroll button) or for annotating
6. Terminating the Enrollment process on a selected pDoc Pro Client if required.
7. Receiving the signed, filled-in PDF or annotated document from the client after it has been updated and signed or annotated by the user
8. Updating the status of the enrollment in the documents history list
9. Extracting data from the signed, filled in form (if the client usage is signing)
10. Updating the enrollment information in the sample database in the record of the selected signer

The pDoc Pro SDK Manual Originator Demo #2 application can be minimized to the taskbar, and the user can perform other operations on the pDoc Pro SDK Server machine.

The pDoc Pro SDK Manual Originator Demo #2 has one screen in its user interface, see the screenshot below.

pDoc Pro SDK Manual Originator Demo #2

Select the Employee:

Text to Add to Document Name: (max 10)

Select Client Device

TOPAZDEVSURFACE (192.168.2.198) (Available)

Topaz iPad. (192.168.2.117) (Not available)

Samsung Galaxy Tab (192.168.2.102) (Available)

Client Usage

Signing

Annotating

Documents History

Select all

| Document | Client | Time | Usage |
|---|------------------------------------|---------------------|------------|
| <input type="checkbox"/> Sample Insurance Selection Form-D20190311T163413 | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:34:11 | Annotating |
| <input type="checkbox"/> Sample Insurance Selection Form (Cancelled) | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:33:13 | Signing |
| <input type="checkbox"/> Sample Insurance Selection Form-D20190311T163241 | Samsung Galaxy Tab (192.168.2.102) | 2019-03-11 16:32:40 | Signing |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

6.1 – Select the Signer

The list of signers is read from the database (i.e., the XML file) and updated in the signers list when the application is started. The originator can select the signer from the available list of signers or select “New Employee” to enroll a new signer who is not already in the list.

6.2 – Enter Text to be Appended or Prepend

If set by the Administrator as required or optional, pDoc Pro SDK Manual Originator Demo #2 displays a text field to enter information that will be either appended or prepended to the document name before it is pushed to the client.

Special characters listed below are not supported in this text field:

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)
- ~ (tilde)
- ; (semi colon)

6.3 – Enter Information for File Naming

If the Administrator sets the file naming convention as “Operator enters information for each signer”, the operator must enter the information for each session. See the screenshot below for reference.

pDoc Pro SDK Manual Originator Demo #2

Select the Employee: Oswald Cobblepot

Fields Required

First Name: (max 50)

Last Name: (max 50)

Room Number: (max 50)

TOPAZDEVSURFACE (192.168.2.198) (Available)

Topaz iPad. (192.168.2.117) (Not available)

Samsung Galaxy Tab (192.168.2.102) (Available)

Client Usage

Signing

Annotating

Enroll Terminate Enrollment

Documents History

Select all

Confirm

| Document | Client | Time | Usage |
|--|------------------------------------|---------------------|------------|
| <input type="checkbox"/> John-Doe-201-D20190311T163740 | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:37:38 | Annotating |
| <input type="checkbox"/> Sample Insurance Selection Form (Cancelled) | TOPAZDEVSURFACE (192.168.2.198) | 2019-03-11 16:37:09 | Signing |
| <input type="checkbox"/> John-Doe-101-D20190311T163643 | Samsung Galaxy Tab (192.168.2.102) | 2019-03-11 16:36:42 | Signing |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

6.4 – Select Client for Signing

The pDoc Pro SDK Manual Originator Demo #2 displays the clients configured for use by the system administrator. The font of each entry in the client list is color coded along with the status of the client.

- If the client name is displayed in black color along with the status “(Available)” at the end of the client name, the client is “Available” and ready to accept a PDF document from the Originator.
- If the client name is displayed in gray color along with the status “(Busy)” at the end of the client name, the client is “Busy” with another signing session and cannot accept PDF documents from the Originator.
- If the client name is displayed in red color along with the status “(Not available)” at the end of the client name, the client is not responding and is not available in the network.
- If the client name contains asterisk (*) at the end of the client name “(Available)*”, the client is configured as the default client for Automatic Originator application.

6.5 – Select Client Usage

If set by the Administrator, the pDoc Pro SDK Manual Originator Demo #2 displays client usage option for changing the client usage. Before pushing a PDF, the originator can change the usage if required.

6.6 – Initiate Enrollment

To enroll a signer:

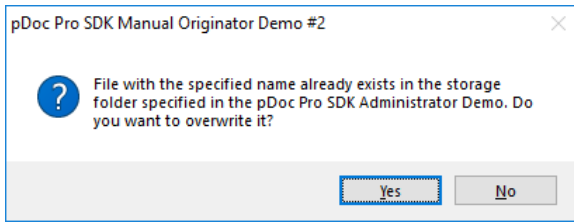
1. Select an existing signer or select “New Employee” from the available list of signers
2. If required, enter the text to add to the document name.
3. Select the pDoc Pro Client from the “Select Client Device” list to which the Enrollment Form should be pushed.
4. Click on the “Enroll” button in the pDoc Pro SDK Manual Originator Demo #2 application. Clicking on “Enroll” first retrieves the selected signer information (for an existing signer) from the database and updates the information to a copy of the default Health Insurance Form and makes the fields which are marked read-only in the database read-only, and then the insurance form with the signer information is pushed to the selected pDoc Pro Client.
5. If the selected signer is “New Employee”, a copy of the default Health Insurance Form with all fields enabled (i.e., not read-only) is pushed to the selected pDoc Pro Client. The pDoc Pro Client will receive the form and display it to the user for updating the information and signing.
6. If the selected signer is “New Employee”, the usage option “Annotating” is not applicable since data cannot be entered into the form fields on the client. Also, for existing signers, the information cannot be updated on the client. Only adding annotations is allowed on the client.

Once the health insurance enrollment form is sent to the client successfully, the pDoc Pro Client entry in the client list is colored gray indicating that the client is in the “Busy” state. The Originator software also displays an entry in the documents history list, showing the name of the health insurance form, the client to which it was sent, and the time it was sent. The background of the entry is white indicating that the document has been sent but the completed version has not yet been received.

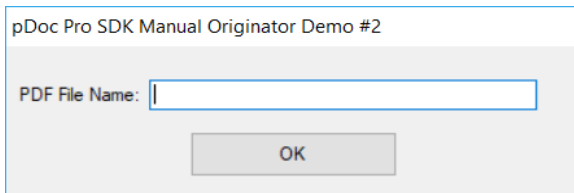
6.7 – Receiving the PDF Document from the Client

When the signer completes the act of updating information and signing or annotating, the signer taps on the “DONE” button in the pDoc Pro Client interface. Tapping on “DONE” button and agreeing to the confirmation message (displayed depending on the setting in the Administrator application) sends the PDF document back to the Originator PC from which the health insurance form was sent. When the client usage is “Signing”, the updated signer information is retrieved from the form and stored in the database for further use.

The signed files are named according to the file naming criteria set in the Administrator. If the administrator set the option “Append the date and time to the file name” option, the signed file names are appended with the date and time. When this option is unselected, a confirmation message will prompt as shown below.



If the user disagrees, a prompt will be shown for entering a new file name and the signed document will be stored with the new file name.



Depending on the option set by pDoc Pro SDK Administrator, the system prints the received PDF or prompts the operator about printing.

6.8 – Documents History

Refer to Section 5.8 for information about the Documents History list.

6.9 – Terminate Enrollment

To terminate the enrollment on a client, first select the client and click on the “Terminate Enrollment” button in the pDoc Pro SDK Manual Originator Demo #2 application. If the enrollment session in the selected client is running, then the session will be terminated and the Client Home screen application is activated automatically.

6.10 – Removing the Entries in the “Documents History” List

Each entry in the “Documents History” list has a checkbox at the beginning of the row where it is listed. The originator can choose entries and click on a button named “Confirm” that is present above the list on the right-hand side to confirm that document is received or the appropriate error received. The entries selected in the list are removed from the list. Clicking the “Select all” check box, selects all the entries in the list.

The entries for the documents that have been enrolled and have not yet been received are not selectable and cannot be removed from the list.

7.0 – pDoc Pro SDK Automatic Originator Demo

The pDoc Pro SDK Automatic Originator Demo Application is the application that resides on the PC of the operator who regularly has people sign or annotate documents. Features supported by this application are:

1. Monitoring the folder specified by the Administrator for automatic operation.
2. Pushing the PDF document found in the monitoring folder to the pDoc Pro Client for signing or annotating
3. Terminating the client session on a selected pDoc Pro Client if required.
4. Receiving the signed PDF document from pDoc Pro Client after it has been signed or annotated by the user and updating the status of the client session in the user interface.

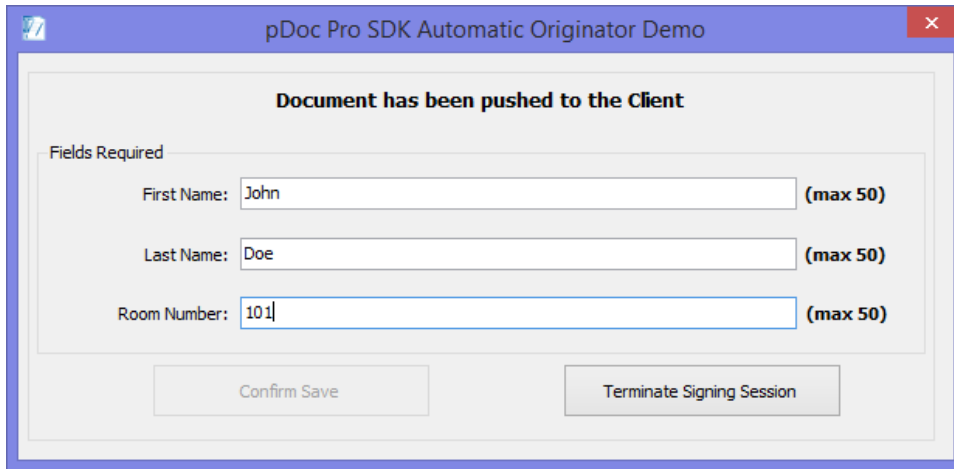
Once it has been started, the pDoc Pro SDK Automatic Originator application will be running in the background, and when a PDF file is detected in the monitoring folder, the PDF file is picked up for processing. Also, after pDoc Pro SDK Automatic Originator has been started, the software will place a program icon in the system tray on the PC's main display, so that the operator can terminate the pDoc Pro SDK Automatic Originator running in background when desired.

When the targeted client IP address tag “<TargetClient>IP Address</TargetClient>” is specified in the Field Definition XML File, then the pDoc Pro SDK Automatic Originator will push the document to the target client, otherwise the document will be pushed to the default client specified in the Administrator application.

If there are one or more documents already in the monitoring folder when a signed document has been received from the client and its receipt has been confirmed, the pDoc Pro SDK Automatic originator will automatically push the next document to the client, and it will continue to do this one document after the next as long as there are documents in the monitoring folder.

If there are documents with different target clients specified in the Field Definition XML files, then the documents are pushed to the different clients one by one continuously. If a document is intended for a particular client and that client is busy, the Automatic Originator proceeds to the next document, and will eventually come back to the first document and keep trying until the client is available.

The pDoc Pro SDK Automatic Originator has one main screen in its user interface, and this user interface is visible to the user only when a signing session is active. See the screenshot below.



When a PDF document is detected in the monitoring folder, the Automatic Originator pushes the PDF document to pDoc Pro Client automatically and displays the above user interface. If the “Automatically add signature fields” option is enabled in the “Add Fields” tab of the pDoc Pro SDK Administrator Demo, signature fields will be inserted into the PDF document before it is pushed to the pDoc Pro Client. Refer to Section 4.8 for more information.

7.1 – Session Completion by the Signer

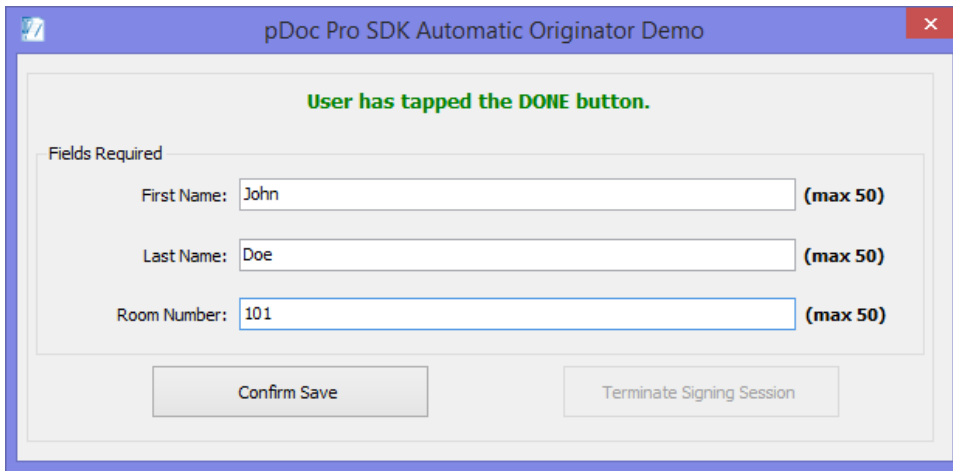
Once the signer has completed signing or annotating the document, the client session can be completed by the signer by tapping on the “DONE” button on pDoc Pro Client and agreeing to the confirmation message (displayed depending on the setting in the Administrator application). The status that “User has tapped the DONE button” is displayed in the Originator user interface.

In the pDoc Pro SDK Administrator Demo, under the “Operator Confirmation” section, if the option “Display operator confirmation window, and require manual operator confirmation” is selected (which is the default), the “Save Signed Document” changes to “Confirm Save”. The operator clicks on the “Confirm Save” button to complete the signing process. The document is named according to the file naming convention and stored in the storage folder.

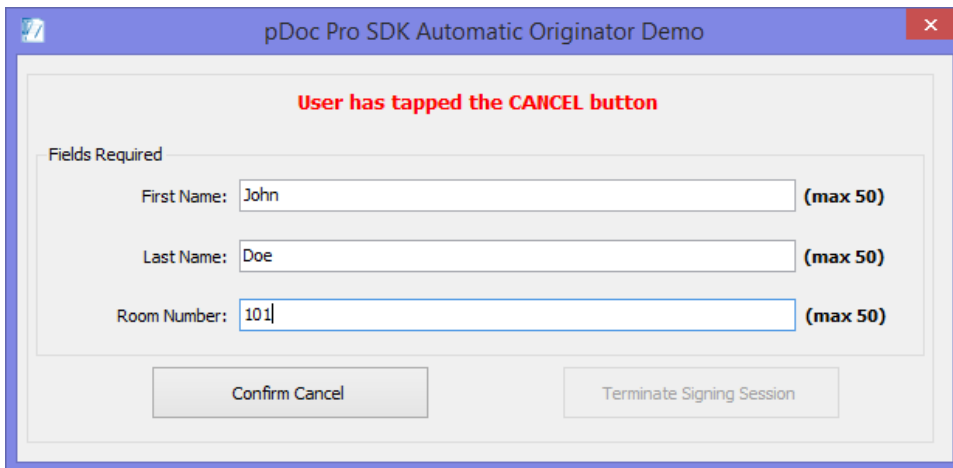
If the automatic confirmation option “Do not display operator confirmation window, and confirm automatically” is selected, the system will not display the “Confirm Save” button and after the signer taps DONE, updates the window to say “User has tapped the DONE button. Document has been saved automatically.” The confirmation windows close automatically 2 seconds after displaying the above message.

If the automatic confirmation is selected, the document is automatically printed if either “Ask operator about printing signed document” or “Always print signed document” is selected. Also, the file naming options are ignored. The document will be saved with its original file name and the date and time appended to it. Also, depending on the options set in the pDoc Pro SDK

Administrator Demo, the system prints the received PDF or prompts the operator about printing.



Instead of the “DONE” button, if the signer taps on the “CANCEL” button to cancel the session, the status “User has tapped the CANCEL button” is displayed and the “Confirm Save” changes to “Confirm Cancel” and enabled as shown below.



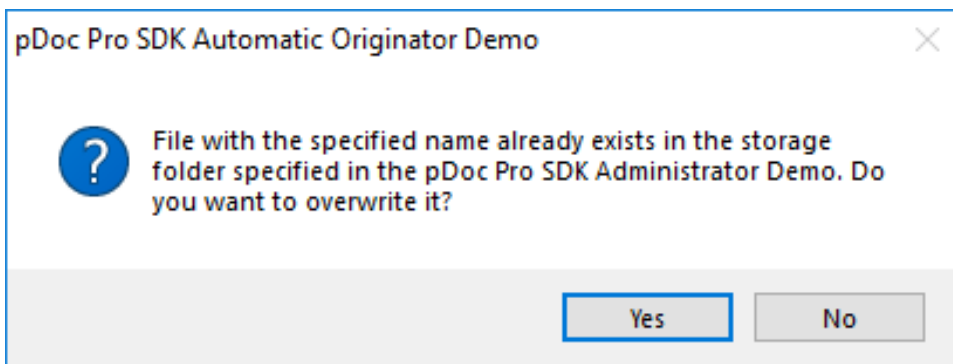
7.2 – Enter Information for File Naming

If the Administrator sets the file naming convention as “Operator enters information for each signer” and sets the operator confirmation as “Display operator confirmation window, and require manual operator confirmation”, the operator must enter the information for each client session. See the screenshot in section 5.3 for reference. If the Administrator sets the file naming convention as “Operator enters information for each signer” and sets the operator confirmation as either “Display operator confirmation window, and confirm automatically” or “Do not display operator confirmation window, and confirm automatically”, the original document name is used while storing the signed document.

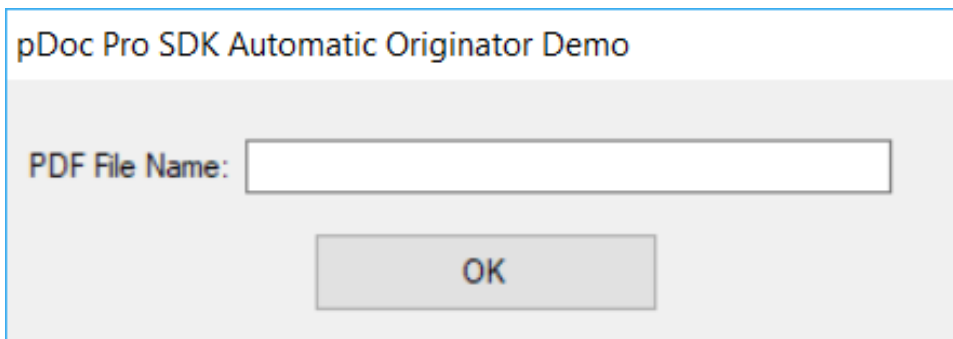
If the file naming convention is set as “Use standard name for each signer”, the document name specified by the administrator is used while storing the signed document.

If the administrator selected the “Append the date and time to the file name” option, the signed file names are appended with the signing date and time.

If the administrator unselects the option “Append the date and time to the file name” and sets the operator confirmation as “Display operator confirmation window, and require manual operator confirmation”, and a document with the same name already exists in the storage folder, a confirmation message will prompt as shown below.



If the user disagrees, a prompt will be shown for entering a new file name and the signed document will be stored with the new file name.



7.3 – Open Monitor Folder

To open the monitor folder, right click on the icon in the system tray and select “Open Monitor Folder”.

7.4 – Terminating pDoc Pro SDK Automatic Originator Demo

To terminate this process running in background, right click on the icon in the system tray and select “Exit pDoc Pro Auto”.

Appendix 1 - Reserving a Client IP Address to Prevent DHCP Address Changes

Follow these steps to reserve the IP Address in the network’s DHCP address pool.

NOTE: The description below is a general guideline. Your specific router may have different screens, but the principle is the same.

Dynamic Host Configuration Protocol (DHCP) Reservation allows your wireless router to reserve the lease of an IP Address for use by a specific device on your network. This effectively ensures that the router does not assign the IP Address to other devices in the network in the future. This is helpful when managing static devices such as network printers that must keep the same IP once configured. This feature can also be used to ensure that the IP address of a device running pDoc Pro Client is not changed after it is assigned the first time by the DHCP server of your router.

IMPORTANT: The IP Address has to be within the known DHCP Reservation range. This is because you cannot set an IP reservation outside the DHCP range.

1. Access your router’s configuration interface and navigate to the **LAN** or **Network** section. From this screen you can access the **DHCP server** settings.



DHCP Server Enabled

Start IP address: 192 .168 . 1 . 100

Maximum number of users: 50 1 to 155

IP address range: 192 .168 .1 .100 to 192 .168 .1 .149

Client lease time: 1440 Minutes

Static DNS 1: 0 0 0 0

Static DNS 2: 0 0 0 0

Static DNS 3: 0 0 0 0

WINS: 0 0 0 0

[DHCP Reservations](#)

2. Select the **DHCP Reservations** option – This is where you can assign a unique, fixed IP Address to a specific device on your network. This is helpful when you want your device to have the same IP Address every time it connects to the network.
3. The DHCP reservation list will show you the list of devices currently connected to your network. Select the device you want to add to the IP reservation list and click **Add DHCP Reservation**. To find the device in the list you can check the IP Address indicated on the pDoc Pro Client status screen and match it to the device IP Address in the list.

DHCP Reservations

Select Devices

| Device Name | Interface | IP Address | MAC Address | Select |
|-------------|-----------|---------------|-------------------|-------------------------------------|
| iPad1 | Wireless | 192.168.1.133 | 00:1F:3E:E3:C9:73 | <input checked="" type="checkbox"/> |
| iPad2 | Wireless | 192.168.1.117 | 68:09:27:38:B1:67 | <input type="checkbox"/> |
| TestPC1-HP | LAN | 192.168.1.138 | E0:69:95:CA:67:EC | <input type="checkbox"/> |
| hp-HP | LAN | 192.168.1.125 | E0:69:95:8E:8B:E7 | <input type="checkbox"/> |

[Add DHCP Reservation](#)

NOTE: If the device you want to add is not listed, you can manually add the device to the DHCP Reservation list. To do this, you will need to get the **MAC Address** of your device and then click **Manually add device reservation** to enter the following details:

- **Device Name** – This is the name of the device you want to add.
- **Assign IP Address** – This is the fixed IP Address it will get every time it connects to the network.
- **To: MAC Address** – This is a unique identifier associated to a device. You can find this in the device settings.

DHCP Reservation List

| Device Name | Assign IP Address | To: MAC Address | |
|------------------------------------|---|--|-------------------------------|
| <input type="text" value="iPad3"/> | 192 . 168 . <input type="text" value="1"/> . <input type="text" value="115"/> | <input type="text" value="E4:8F:CE:37:49:D7"/> | Save / Cancel |

[Manually add device reservation](#)

QUICK TIP: You can click on **Edit** or **Delete** to configure your DHCP Reservation List. **Edit** will allow you to change the **Device Name**, **Assign IP Address**, and **To: MAC Address**. **Delete** will remove the device from the list.

DHCP Reservation List

| Device Name | Assign IP Address | To: MAC Address | |
|-------------|-------------------|-------------------|-------------------------------|
| iPad3 | 192.168.1.133 | 00:1F:3C:E3:C9:73 | Edit / Delete |

[Manually add device reservation](#)

Once completed, your device will automatically get the assigned IP Address every time it connects to the network. It will also no longer experience any IP Address conflicts with other devices in the network.