User Manual
pDoc Annotator Duo

Version 1.5
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Table of Contents

Table of Contents

1.0 – The pDoc Annotator Duo Software System Overview

1.1 – System Description

The pDoc® Annotator Duo Software System provides a solution for environments where a system operator pushes a document from their PC to a connected Topaz GemView Tablet Display for annotating typically by another person. The pushed document can be a form, contract, or other document for a user to annotate using the GemView Tablet Display pen.

When the user has finished and taps the Done button icon, the signing session on the Tablet Display is completed and the annotated document is stored and available to the operator. The pDoc Annotator Duo software then stamps the document by certifying it with a digital signature and stores the document. Then the Tablet Display goes back to sleep, playing a video or displaying a sequence of images, until it receives another document for annotating.

1.2 – System Components

The pDoc Annotator Duo Software System comprises:

- A Windows PC with one or two attached Topaz GemView Tablet Displays (such as the Topaz GemView 7, GemView 10, or GemView 16) for displaying a document to be annotated

- The pDoc Annotator Duo Administrator Application

- The pDoc Annotator Duo Manual Originator Application

- The pDoc Annotator Duo Automatic Originator Application

- The pDoc Annotator Duo TD Application that is used to annotate the document on the GemView Tablet Display

- The pDoc Annotator Duo Idle Screen that runs on the Tablet Display when it is idle

- The pDoc Signer application that runs on the PC and displays the pushed and received PDF documents for originator review

1.3 – System Operation

A typical transaction using the pDoc Annotator Duo Software System consists of the following steps:

1. Pushing a Blank Document Form from the PC to the GemView Tablet Display

   There are two ways a document can be pushed to the GemView Tablet Display:

   a. Automatically:
      The pDoc Annotator Duo Automatic Originator is a program that runs in background monitoring a user specified folder, waiting for a PDF document to be stored in it.
      i. When a document is stored in the folder, the Automatic Originator pushes the document to the GemView and displays it.
      ii. A copy of the document on the Tablet Display is optionally displayed in a read-only instance of pDoc Signer on the PC for system operator review
      iii. The Automatic Originator displays a window to the system operator requesting information to be used in naming the document after it is signed.

   b. Manually:
      i. Using the pDoc Annotator Duo Manual Originator software, the system operator selects a document for the customer to annotate.
      ii. The system operator clicks the "Push Document to GemView Display" button, which displays the selected document on the Tablet Display connected to the PC.
      iii. A copy of the document on the Tablet Display is optionally displayed in a read-only instance of pDoc Signer on the PC for system operator review.
      iv. The Manual Administrator window displays fields to the system operator requesting information to be used in naming the document after it is signed.

2. Annotating the Document on the Tablet Display

   a. The customer uses the pDoc Annotator Duo TD Software to annotate the document on the Tablet Display

   b. The customer taps on the "DONE" button, which completes the signing session.

3. Saving the Signed Document on the PC

a. The pDoc Annotator Duo Manual/Automatic Originator Software receives the annotated document from the Tablet Display, saves it automatically in a specified folder, and indicates on the GUI that the completed document has been received and saved

b. The system operator uses the pDoc Annotator Duo Manual/Automatic Originator Software to confirm completion of the transaction. Before saving the document, it is stamped by adding a certifying digital signature to the document.

c. The received annotated document is optionally displayed in a read-only instance of pDoc Signer for the system operator review.

2.0 – Installing/Uninstalling pDoc Annotator Duo Software

2.1 – Before You Begin

- pDoc Annotator Duo Software runs on Windows 7, 8, 8.1, and 10 (both tablets and desktop PCs).

- Your PC should have a minimum of 75 MB free space on the hard drive in addition to the free space requirements for Windows.

- Before installing a new version of pDoc Annotator Duo Software, uninstall any older versions of pDoc Annotator Duo on your PC.

2.2 – Installing the Topaz GemView Tablet Display

The device used for signature capture in pDoc Annotator Duo is the Topaz GemView Tablet Display. The pDoc Annotator Duo TD software uses the GemView Tablet Display software drivers that provide communication between the PC and Tablet Display, so the drivers must be installed on the PC before you can capture signatures from the Tablet Display. If you have a Tablet Display device, its drivers need to be installed according to the instructions in the Tablet Display User Manual before installing the pDoc Annotator Duo software.

In many esigning applications, it is necessary for both the originator and the signer to view the document being signed on separate displays and see the updates the other person is making to the document as they do it in real time. If you plan to use two Topaz GemView Tablet Displays configured in such a cloned configuration, see the separate document entitled **GemView Tablet Displays Clone Operation**.

2.3 – Installing pDoc Annotator Duo Software

Installing pDoc Annotator Duo software is accomplished by running the pDoc Annotator Duo installation file provided. 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 special folder for installation. The sequence of screens displayed guide the user through the installation process. The pDoc Annotator Duo software installs shortcuts to the pDoc Annotator Duo Manual Originator, the pDoc Annotator Duo Automatic Originator, and the pDoc Duo Idle Screen on the desktop.

2.4 – Uninstalling pDoc Annotator Duo Software

To uninstall pDoc Annotator Duo from your PC:

1. Go to Control Panel → Programs and Features
2. Select pDoc Annotator Duo
3. Click on the "Remove" button, and follow the instructions to uninstall the software.

Uninstalling pDoc Annotator Duo Software does not affect documents that have already been annotated; pencil annotations that have been placed into documents are not removed during uninstallation.

Note: Deleting the pDoc Annotator Duo installation folder directly will not uninstall the software completely.

3.0 – pDoc Annotator Duo Administrator

The pDoc Annotator Duo Administrator allows a system administrator to setup a system, define default values, and update them as required. The system administrator can configure the idle screen of the attached Tablet Display and setup the defaults for the annotating application on the Tablet Display. Typically, the Administrator is used to do initial system setup, and then is used only occasionally after that. All the other system components (see Section 1.2) should be closed before updating system parameters in the Administrator.

## 3.1 – Specifying System Options

3.1.1 – Specifying Document Options

The signed or unsigned PDF documents transferred to the PC from the Tablet Display 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 default folder for selecting PDF documents in the Manual Originator to push from the PC to the Tablet Display 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 folder for monitoring PDF documents for the Automatic Originator can be specified here too. The path can be changed by clicking on the "Browse" button and selecting the desired location. The default PDF document to be used in Manual Originator 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 Manual Originator" to display the full path of the PDF document that is transferred from the PC to the Tablet Display in the Manual Originator application. 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 interval, if it finds a PDF document, it will pick it up and display it on the GemView. 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.
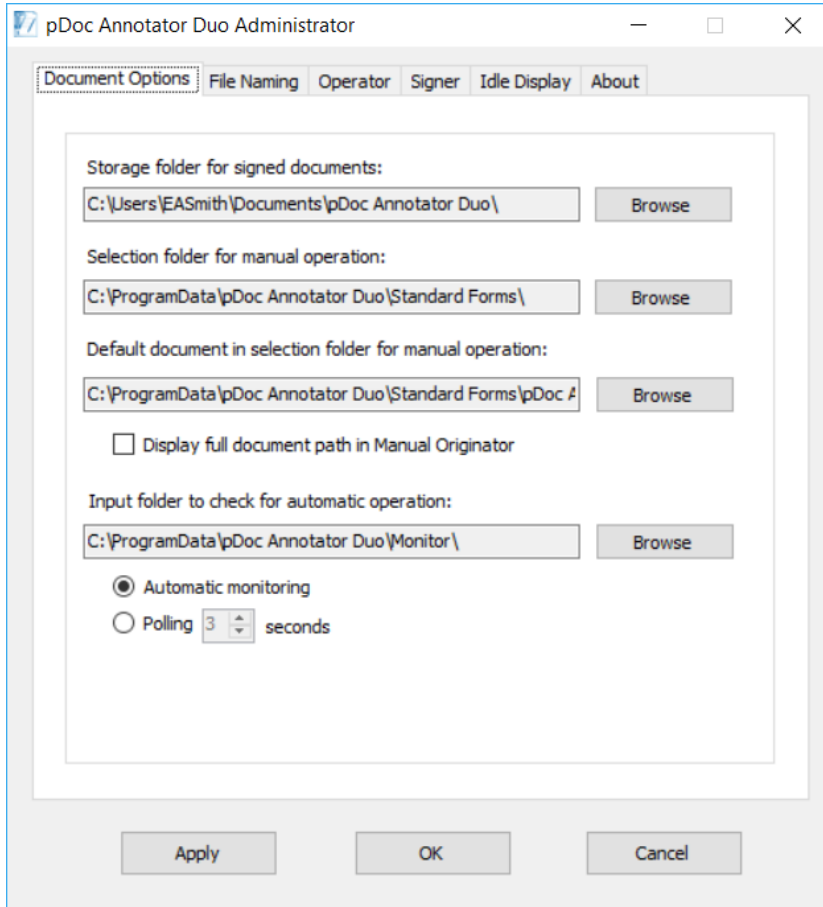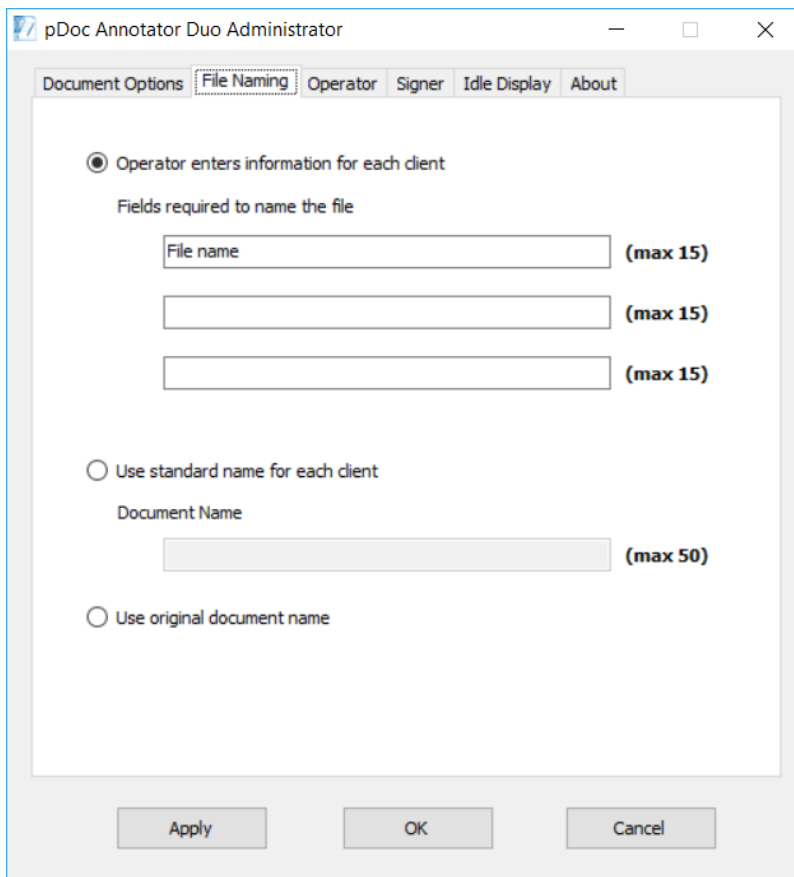
3.2 – File Naming Options

The File Naming tab of the pDoc Annotator Duo Administrator allows the administrator to specify the file naming convention for the signed documents when they are received from the GemView Tablet Display. The files can be named with the information provided by the originator during the signing session, the administrator can specify a standard name to be used for each client, or the original document name can be used. The administrator can either select "Operator enters information for each client", select the option "Use standard name for each client", or select the option "Use original document name".

When the administrator selects "Operator enters information for each client", they can specify the names for the 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 client", they can specify the document name to be used in each file name, e.g., "Guest Agreement". For both the above options, the date and time of the completion of the signing session is appended to the document name when saving the document in the storage folder. After selecting one of the options for file naming, if the information required is not provided, the original file name appended with the date and time will be used while saving the document in the storage folder.

When the administrator selects "Use original document name", the signed document is saved with the original file name in the storage folder. If the document with the same name already exists, then that existing document will be overwritten with the signed document in the storage folder.
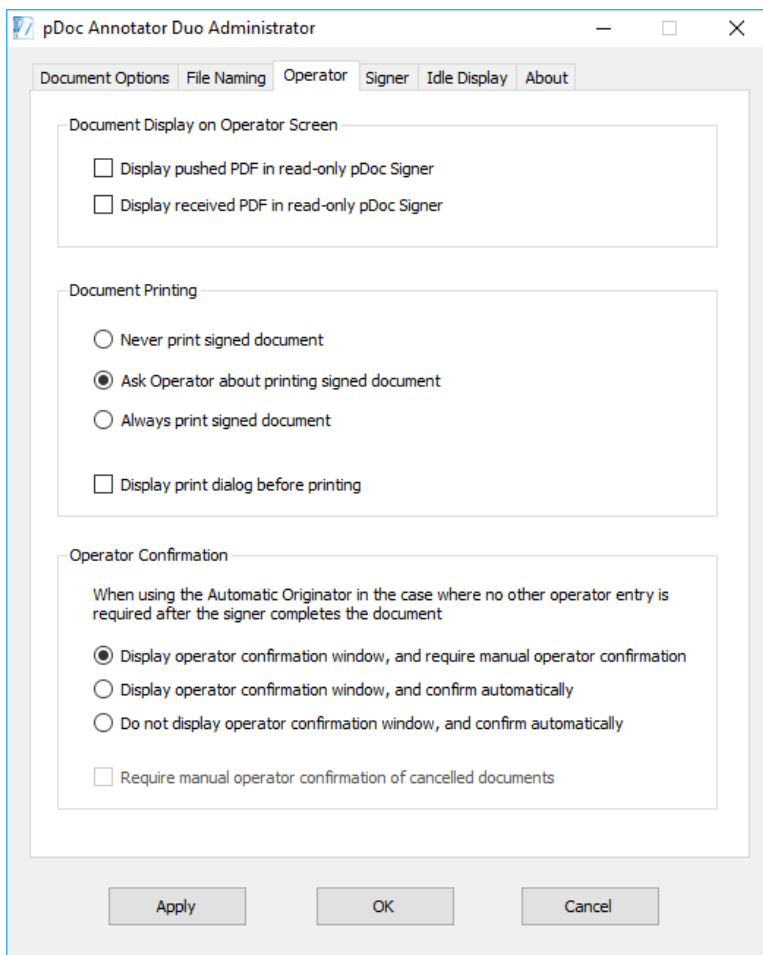
3.3 – Operator Options

The first section of the Operator options screen provides options for the operator to view original and final versions of the PDF document pushed to the Tablet Display. Select "Display pushed PDF in read-only pDoc Signer" to display the PDF document pushed to the Tablet Display in a read-only instance of pDoc Signer for review by the system operator.
Select "Display received PDF in read-only pDoc Signer" to display the PDF document received from the Tablet Display after the signer taps on the "DONE" button in a read-only instance of pDoc Signer for review by the system operator.

Another way for the originator to see the document pushed to the signer's GemView Tablet Display is to configure the system with cloned GemView Tablets. This configuration enables both the originator and the signer to see the changes the other person makes to the document in real time as it is happening. To set up this cloned configuration, see the separate document entitled **GemView Tablet Displays Clone Operation**.

In the Document Printing section, select the printing options for the signed document. The default is "Ask Operator about printing signed document". This option specifies that the Operator should be prompted about printing the signed document when it is received from the GemView Tablet Display. Selecting "Always print signed 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 signed document" to specify that the signed document received from the GemView Tablet Display 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.

In the Operator Confirmation section, select the operator confirmation option for the Automatic Originator. The default is the manual operation "Display operator confirmation window, and require manual operator confirmation". This option requires the operator to manually confirm the completion of the annotating process.

Selecting the "Display operator confirmation window, and confirm automatically" option will automatically confirm the completion of the annotating process. The purpose of this feature is to automatically close the confirmation dialog that is displayed when the document is pushed to the GemView Tablet Display for annotating 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 signer taps DONE on the GemView Tablet Display; pDoc Annotator 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 the above 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 annotating process. The purpose of this feature is to avoid showing any information about the act-of-signing that is being conducted on the GemView Tablet Display. 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. Select the option "Require manual operator confirmation of cancelled documents" to manually confirm the documents that are cancelled during the signing session on the Tablet Display. This option requires operator action even when you have selected the "Display operator confirmation window, and confirm automatically" or the "Do not display operator confirmation window, and confirm automatically" option.

3.4 – Specifying Signer Options

A screenshot of the "Signer Options" tab is shown below.
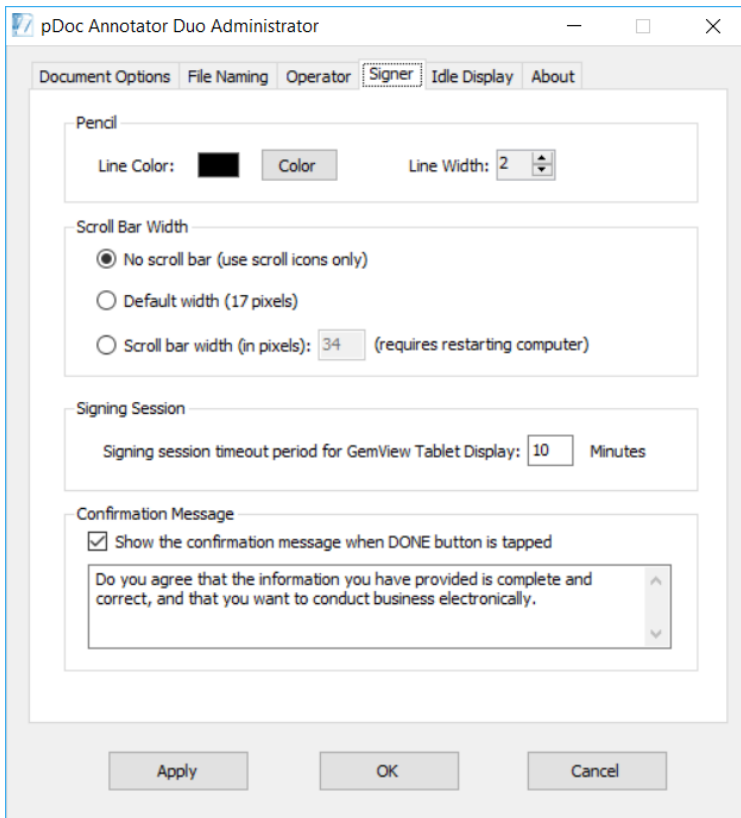
3.4.1 – Pencil Options

This section of the Signer tab allows the system administrator to specify the parameters to be used while adding pencil annotations in the pDoc Annotator Duo TD application.

1. The Line Color to be used while writing the pencil annotation on the Tablet Display and in displaying the pencil annotation on the PDF document.

2. The Line Thickness to be used while writing the pencil annotation on the Tablet Display and in displaying the pencil annotation on the PDF document. The default Line Thickness is 2. The value can range from 1 to 10.

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

3.4.2 – Scroll Bar Width Options

This section of the Signer tab allows the system administrator to specify the options for the display of the scroll bar in the pDoc Annotator Duo TD application. Select "No scroll bar (use scroll icons only)" if the scroll bars should not appear in the pDoc Annotator Duo TD application while annotating the document. The signer needs to 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 Annotator Duo Administrator, 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 in the PC and not just specific to pDoc Annotator Duo TD 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 "No scroll bar (use scroll icons only)" is selected and hence the signer will not see the vertical scroll bar on the pDoc Annotator Duo TD application while annotating the document.

3.4.3 – Signing Session Timeout

The signing session timeout period for the GemView Tablet Display can be specified here. The default value is 10 minutes. The value can range from 5 to 720 minutes. During the signing session on the GemView Tablet Display, the signing session automatically times out after the number of minutes specified here if the signing session is not completed by that time.

3.4.4 – Confirmation Message Options

The confirmation message that is displayed on the GemView Tablet Display when the signer completes the signing 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. When the operator clicks on the "Save Signed Document" button in the Automatic Originator, this setting (i.e., turning off the confirmation message display) is not applicable. The confirmation message is always displayed in this case.

3.5 – Idle Display

The Idle Screen is the screen that is displayed on the Tablet Display when it is in the idle state, i.e., when it is not serving any PDF signing requests. To configure the Idle Screen for the Tablet Display, select the tab "Idle Display" tab. A screenshot of the "Idle Display" tab is shown below.
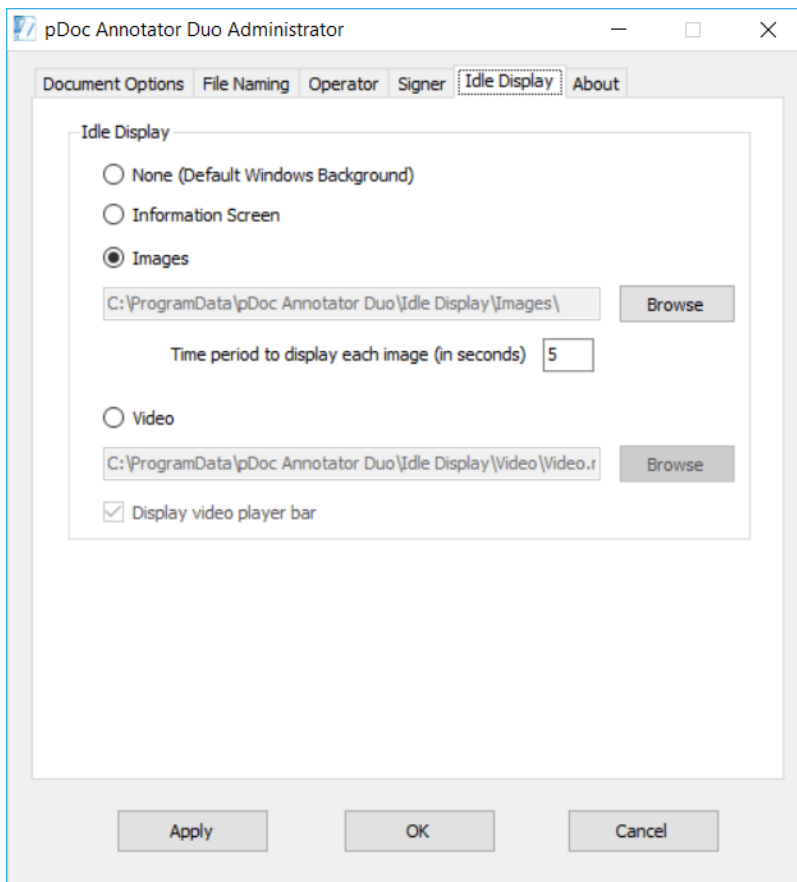
3.5.1 – Specifying the Idle Screen Display

The Idle Screen of the Tablet Display can display an information screen (showing the version information), display images continuously, or run a video continuously. The Administrator can also select whether the Idle Screen should be displayed or not. The Idle Screen display type can be updated by the system administrator using this section.

3.5.1.1 – None (Default Windows Background)

Click the None (Default Windows Background) radio button to not display the idle screen on the Tablet Display.

3.5.1.2 – Information Screen Option

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

3.5.1.3 – Images Option

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

The System Administrator can select the parent folder containing subfolders that have the images to be displayed continuously on the Tablet Display for the different Tablet Display devices. The System Administrator can also specify the time period to display each image. The default images are copied during installation into the "ProgramData\pDoc Annotator Duo\Idle Display\Images" folder. You can use your own images by putting them into the folder that corresponds to your Tablet Display. Alternatively, you can create another folder with the same structure as under the "ProgramData\pDoc Annotator Duo\Idle Display\Images", and then select the folder here.

The folder can be selected by using the "Browse" button located next to the images option. After you click Browse, navigate to the folder you want to add and click on Open.

3.5.1.4 – Time Period to Display Image

The System Administrator can specify the time period each image should be displayed when the idle 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 Tablet Display is 5 seconds. The minimum and maximum time periods for displaying images are 1 second and 300 seconds.

3.5.1.5 – Video Option

The System Administrator can specify that a selected video is to be run continuously on the Tablet Display idle 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. The selected video is first copied to the "Video" folder in the pDoc Annotator Duo Data folder (typically C:\ProgramData\pDoc Annotator Duo\Idle Display\Video), and the video path will be updated in the "Video" text box.

The video formats that are supported for running on the idle screen on the Tablet Display are .mp4, .mpeg, .mpg, .3gp, .asf, .m4v, .mkv, .mov, and .wmv videos. The size of the selected video cannot exceed 500 MB.

3.5.1.6 – 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 idle screen of the Tablet Display. 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.

3.6 – About

The "About" tab in the pDoc Annotator Duo Administrator displays the version details of the pDoc Annotator Duo software that is currently installed on the PC.
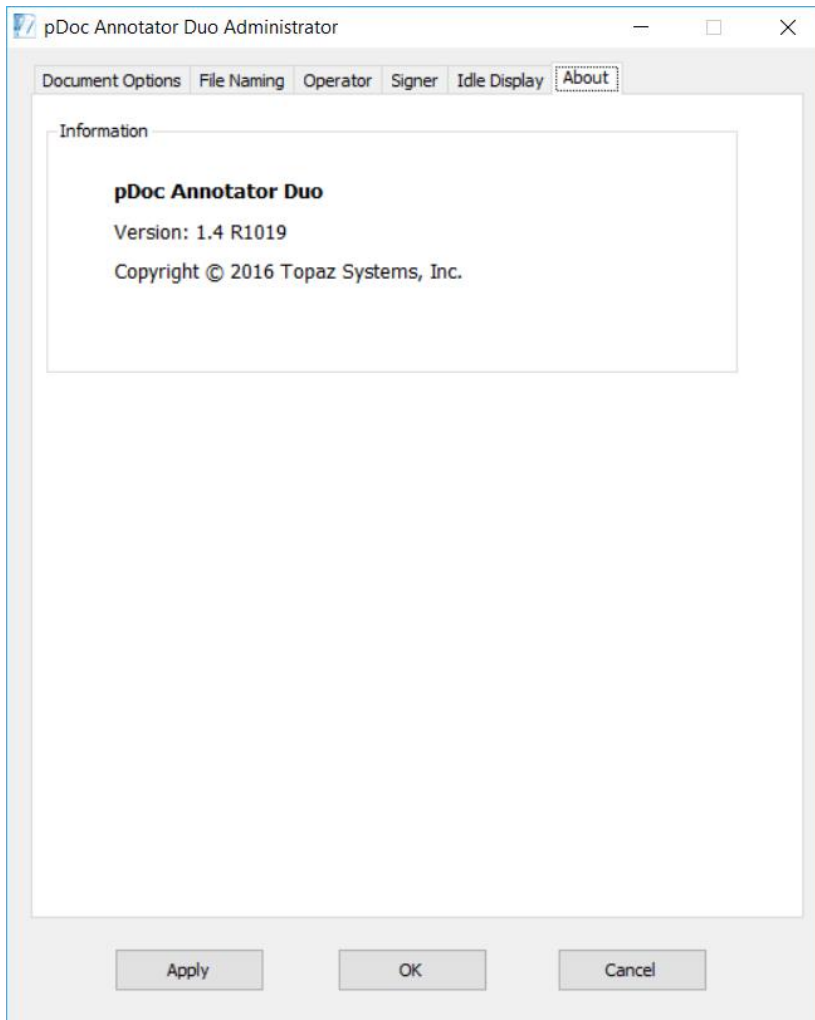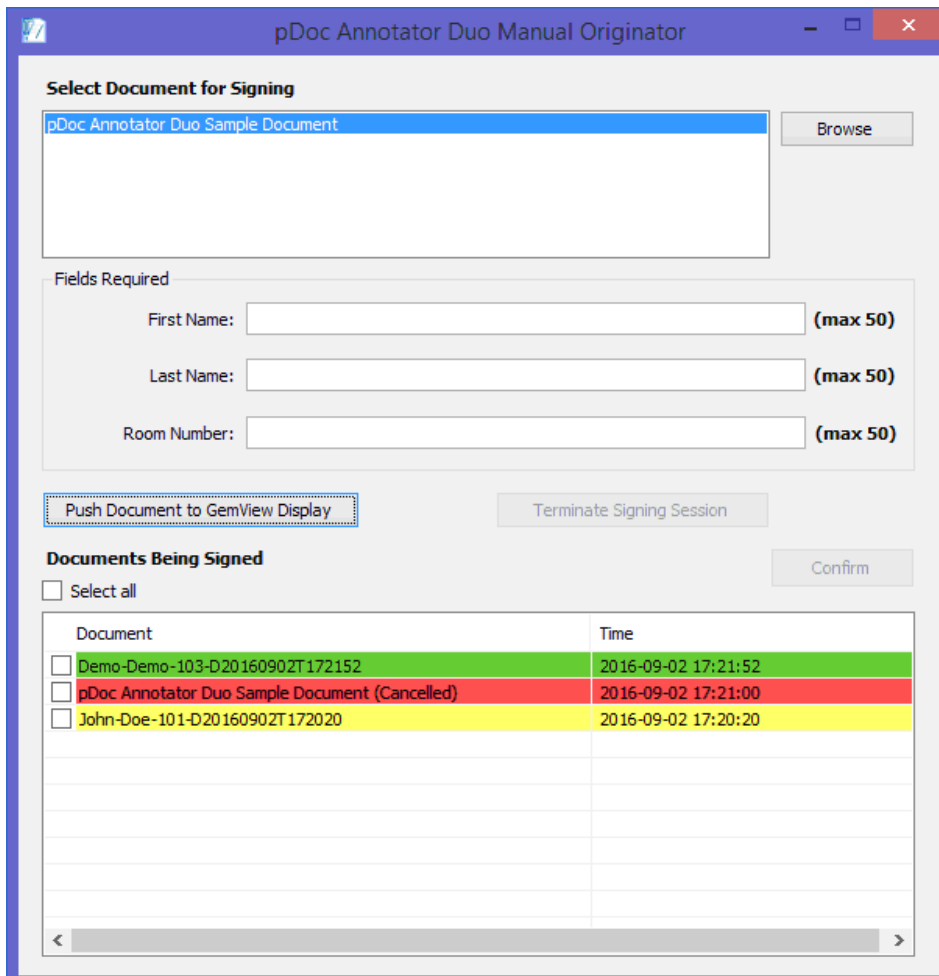
4.0 – pDoc Annotator Duo Manual Originator

The pDoc Annotator Duo Manual Originator Application is the application that resides on the PC of the operator who regularly has people sign 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. Pushing the selected PDF document to the attached Tablet Display for signing
3. Terminating the signing session on the attached Tablet Display
4. Receiving the signed PDF document from the Tablet Display after it has been signed by the user, and updating the status of the signing session in the documents being signed list.

The pDoc Annotator Duo Manual Originator application can be minimized to the taskbar and the user can perform other operations on the PC. The pDoc Annotator Duo Manual Originator has one screen in its user interface, see the screenshot below.
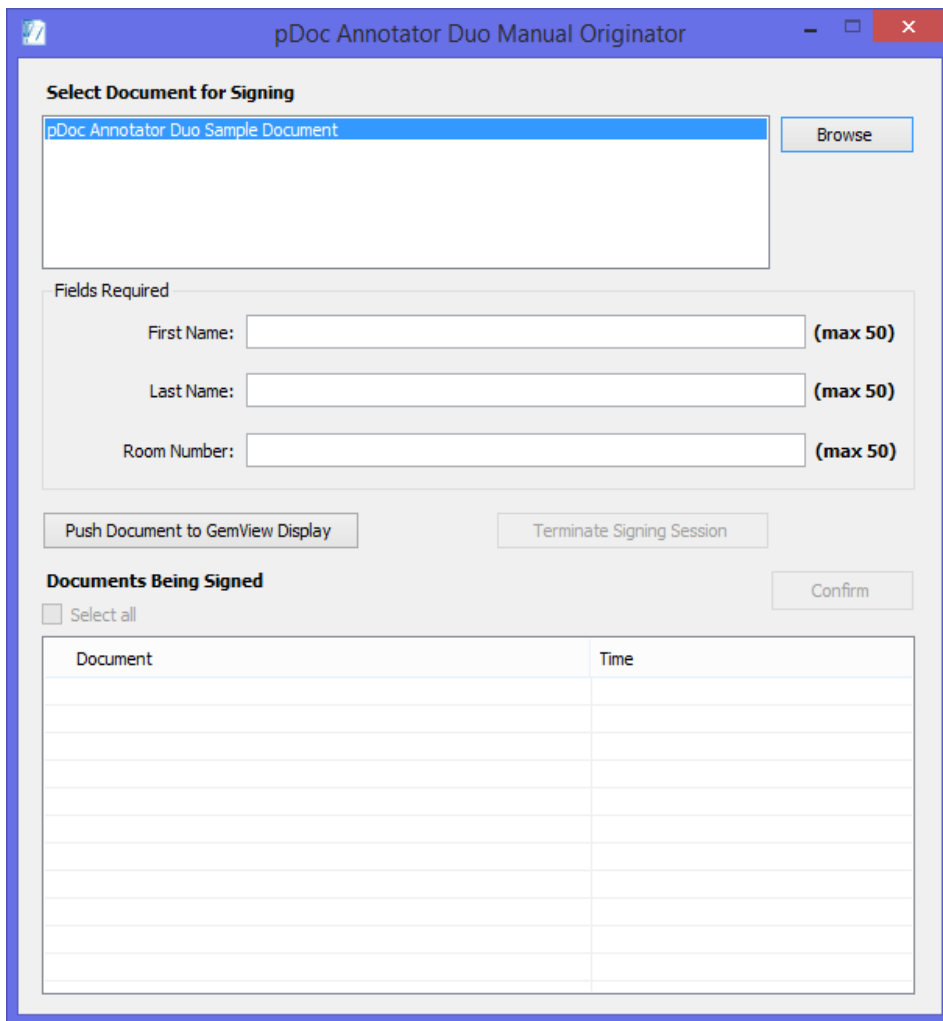
www.topazsystems.com

4.1 – Select Document for Signing

The originator can select a document for signing 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.

4.2 – Enter Information for File Naming

If the Administrator sets the file naming convention as "Operator enters information for each client", the operator needs to enter the information for each signing session. See the screenshot below for reference.

4.3 – Push PDF Documents

To push a PDF document to the GemView Tablet Display,

1. Select the PDF document from the "Select Documents for Signing" list
2. If required, enter the information for file naming.
3. Click on the "Push Document to GemView Display" button in the Originator application to push a copy of the selected PDF document to the attached GemView Tablet Display. The PDF document is displayed to the user for signing on the Tablet Display.

Once the PDF document is displayed in the Tablet Display successfully, the Originator software displays an entry in the Documents Being Signed list, showing the name of the document pushed, and the time it was pushed. The background of the entry is white indicating that the document has been pushed but the signed version has not yet been received.

Also, depending on the option set in the pDoc Annotator Duo Administrator, a copy of the pushed PDF is displayed in a read-only instance of pDoc Signer for system operator review.

4.4 – Receiving the Signed PDF Document from the Tablet Display

When the signer completes the act of signing, the signer taps on the "DONE" button in the pDoc Annotator Duo TD interface. Tapping on "DONE" sends the PDF document back to the Originator from where the PDF document was pushed. The signed files are named according to the file naming criteria set in the Administrator (appended with date and time information) and stored in the storage folder.

Also, depending on the option set in the pDoc Annotator Duo Administrator, the received PDF is displayed in a read-only instance of pDoc Signer for the system operator to review.

4.5 – Documents Being Signed

The Documents Being Signed list contains the name of the document that has been pushed and is being signed, and the names of documents that have been signed and received. Each item in the list contains the name of the document, and the date/time the Originator pushed the document or received the document. See the screenshot in Section 4.0.

4.5.1 – Documents in process of being signed

The PDF document that is in the process of being signed is shown with a white background in the "Documents Being Signed" list box. This indicates that the Originator has pushed a PDF document to the Tablet Display and is waiting for the Tablet Display to send back the signed document.

4.5.2 – Signed PDF Documents

The PDF documents that are signed and received are shown with a green background in the "Documents Being Signed" list box. This indicates that the signing process has been successfully completed on the Tablet Display and the PDF document has been received successfully by the Originator. The PDF document received time will be updated in the time column.

4.5.3 – Unsigned PDF Documents

The PDF documents that are unsigned and received are shown with a yellow background in the "Documents Being Signed" list box. This indicates that the user has returned the document without signing it and the PDF document has been received successfully by the Originator. The PDF document received time will be updated in the time column.

4.5.4 – Documents with other statuses

The PDF documents in the "Documents Being Signed" list are shown with a red background in the following scenarios:

1. The PDF documents for which the user cancelled the signing process on the Tablet Display. The document name is appended with the text "Cancelled" in this case.
2. The PDF documents for which the originator terminated the signing process on the Tablet Display. The document name is appended with the text "Terminated" in this case.
3. Some error occurred during display of the document on the Tablet Display. The document name is appended with the text "Error" in this case.
4. When the signing session times out. The time out period is 10 minutes by default. If the originator does not receive the document back in this time, the signing session is terminated by the originator automatically. The document name is appended with the text "Timed Out" in this case.

4.6 – Terminate Signing Session

To terminate the signing session on the Tablet Display, click on the "Terminate Signing Session" button in the pDoc Annotator Duo Manual Originator application. If the signing session in the attached Tablet Display is running, then the session will be terminated and the Idle Screen application will be activated.

4.7 – Removing the Entries in the "Documents Being Signed" List

Each entry in the "Documents Being Signed" 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 entry for the document that has been pushed and not yet received is not selectable and cannot be removed from the list.
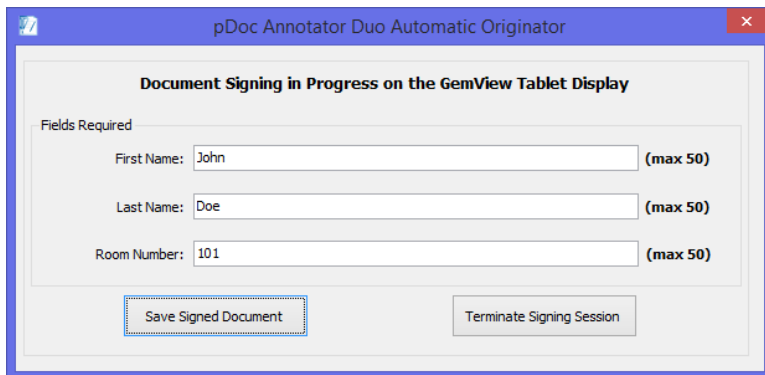
5.0 – pDoc Annotator Duo Automatic Originator

The pDoc Annotator Duo Automatic Originator Application is the application that resides on the PC of the operator who regularly has people sign 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 attached Tablet Display for signing
3. Terminating the signing session on the attached Tablet Display
4. Receiving the signed PDF document from the Tablet Display after it has been signed by the user and updating the status of the signing session in the user interface.

Once it has been started, the pDoc Annotator Duo 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 Annotator Duo 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 Annotator Duo Automatic Originator running in background when desired.

The pDoc Annotator Duo 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 the Tablet Display automatically and displays the above user interface. Also, depending on the option set in the pDoc Annotator Duo Administrator, a copy of the pushed PDF is displayed in a read-only instance of pDoc Signer for system operator review.
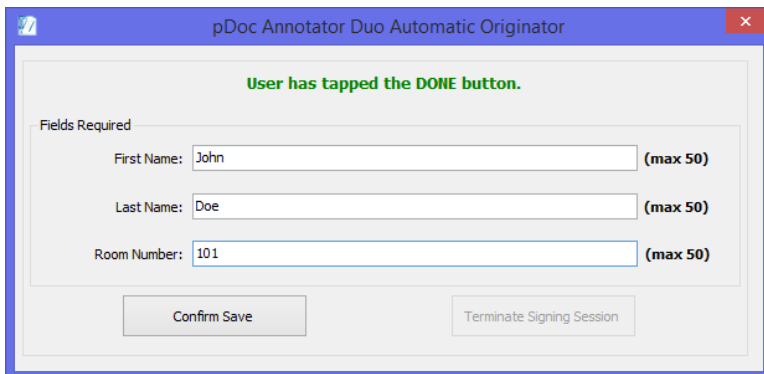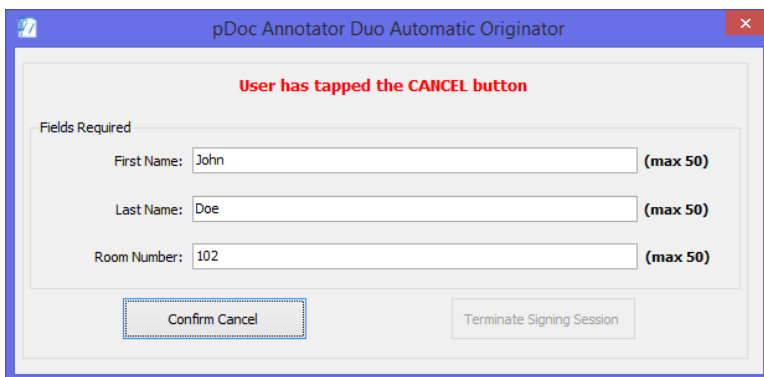
5.1 – Signing Session Completion by the Signer

Once the signer has completed annotating the document, the signing session can be completed by the signer by tapping on the "DONE" button on the GemView Tablet Display 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 and 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.

Also, depending on the options set in the pDoc Annotator Duo Administrator,
- The received PDF is displayed in a read-only instance of pDoc Signer for the system operator to review.
- 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 signing session, the status "User has tapped the CANCEL button" is displayed and the "Save Signed Document" changes to "Confirm Cancel" as shown below.

5.2 – Signing Session Completion by the Operator

If intended, the operator can complete the signing session by clicking on the "Save Signed Document". Clicking on the "Save Signed Document" button first displays a message for the operator to confirm the action and then displays the save confirmation message on the GemView Tablet Display. The originator window changes as shown below.

Depending on the signer response, further activity takes place in the Originator as explained in section 5.1.

If the Signer does not respond to the confirmation message within 30 seconds, the originator is informed by the display of the following screen.

The originator can select "Save document changes and close the signing session" to complete the signing session and to store the signed document in the storage folder. Then, as above, depending on the options set in the pDoc Annotator Duo Administrator,

- The received PDF is displayed in a read-only instance of pDoc Signer for the system operator to review.
- The system prints the received PDF or prompts the operator about printing.

The originator can select "Cancel the signing session" to cancel the signing session.
The originator can select "Resume the signing session" to give more time for the signer to complete the signing session.

5.3 – Enter Information for File Naming

If Administrator sets the file naming convention as "Operator enters information for each client", the operator needs to enter the information for each signing session. See the screenshot above for reference. If the file naming convention is set as "Use standard name for each client", the document name specified by the administrator is used while storing the signed document.
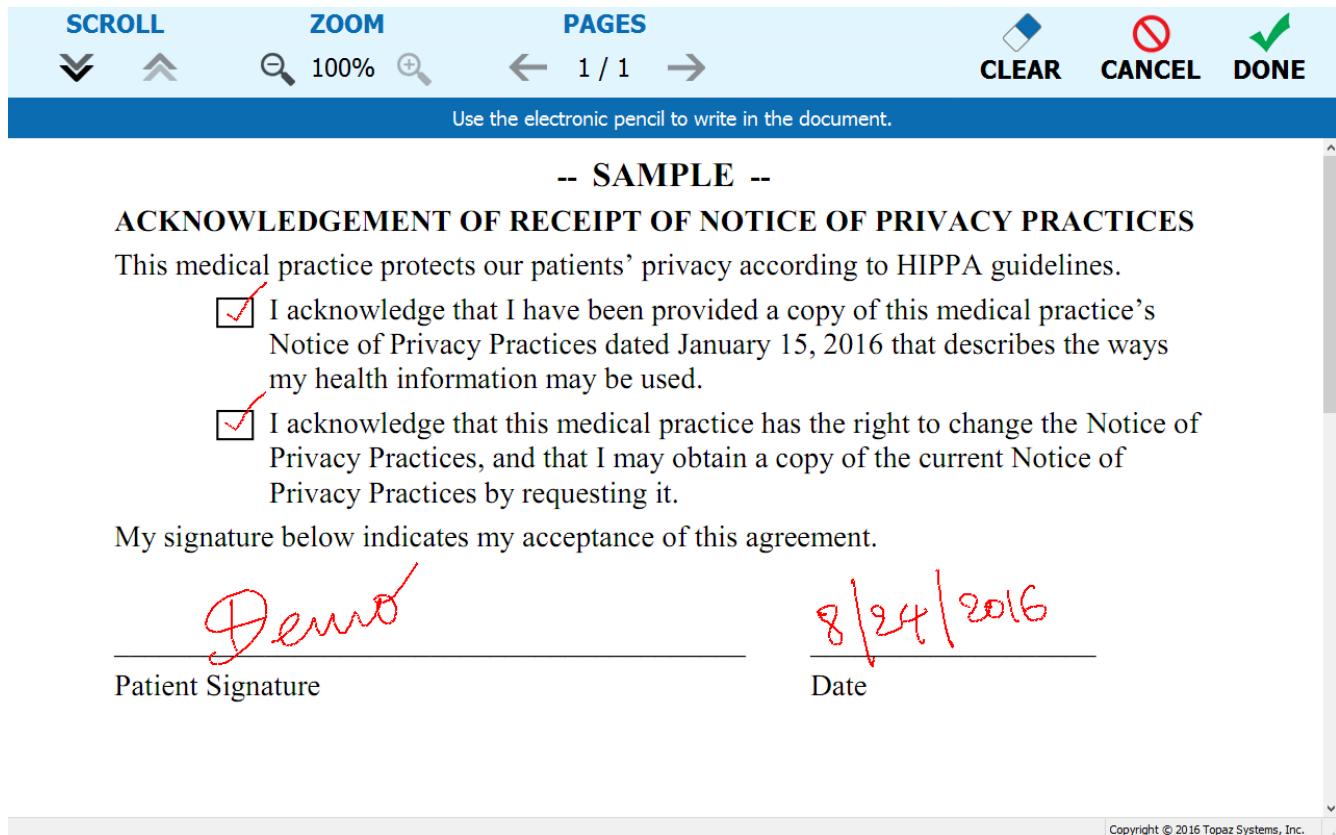
5.4 – Terminating pDoc Annotator Duo Automatic Originator

To terminate this process running in background, right click on the icon in the system tray and select "Exit pDoc Annotator Duo".

6.0 – pDoc Annotator Duo TD

The pDoc Annotator Duo TD software allows annotating of PDF documents. You can add pencil annotations into PDF documents using this application.

The following screenshot of the pDoc Annotator Duo TD on the Tablet Display shows the user interface and a sample document to be annotated.

SCROLL	ZOOM	PAGES	CLEAR	CANCEL	DONE
⌄ ⌃	⊖ 100% ⊕	← 1 / 1 →	◇	🚫	✔

Use the electronic pencil to write in the document.

-- SAMPLE --

ACKNOWLEDGEMENT OF RECEIPT OF NOTICE OF PRIVACY PRACTICES

This medical practice protects our patients' privacy according to HIPPA guidelines.

☑ I acknowledge that I have been provided a copy of this medical practice's Notice of Privacy Practices dated January 15, 2016 that describes the ways my health information may be used.

☑ I acknowledge that this medical practice has the right to change the Notice of Privacy Practices, and that I may obtain a copy of the current Notice of Privacy Practices by requesting it.

My signature below indicates my acceptance of this agreement.

Demo   *8/24/2016*

_____   _____

Patient Signature   Date

Copyright © 2016 Topaz Systems, Inc.

6.1 – Basic Operations

6.1.1 – Opening PDF Documents

The pDoc Annotator Duo TD automatically opens a PDF document when it receives the document pushed by the system operator. When it opens the PDF document, the pDoc Annotator Duo TD 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.
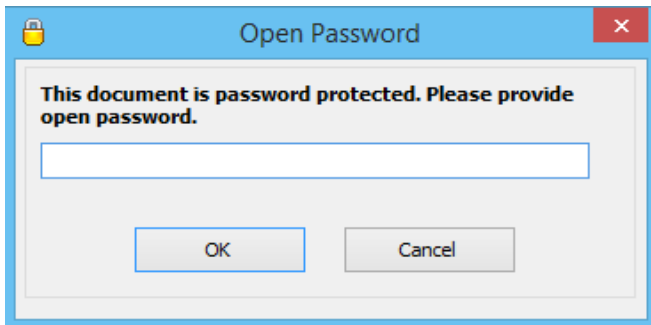
If the PDF document that is being opened also had a "Permissions Password" along with the "Open Password" and if the permissions on the document allow adding annotations to the PDF, the document is displayed to the signer. If not, the document is not displayed to the signer and an error status is sent back to the operator. If the PDF document that is being opened has only a "Permissions Password", the password dialog is not displayed, and if the permissions on the document allow adding annotations to the PDF, the document is displayed to the signer. If not, the document is not displayed to the signer and an error status is sent back to the operator.

6.1.2 – Navigating and Viewing PDF Documents

The icons available in the pDoc Annotator Duo TD are used to scroll up or down within the page, navigate between the pages, and zoom in or zoom out on the page. The icons that are applicable for the current view are circled in green in the screenshot below.
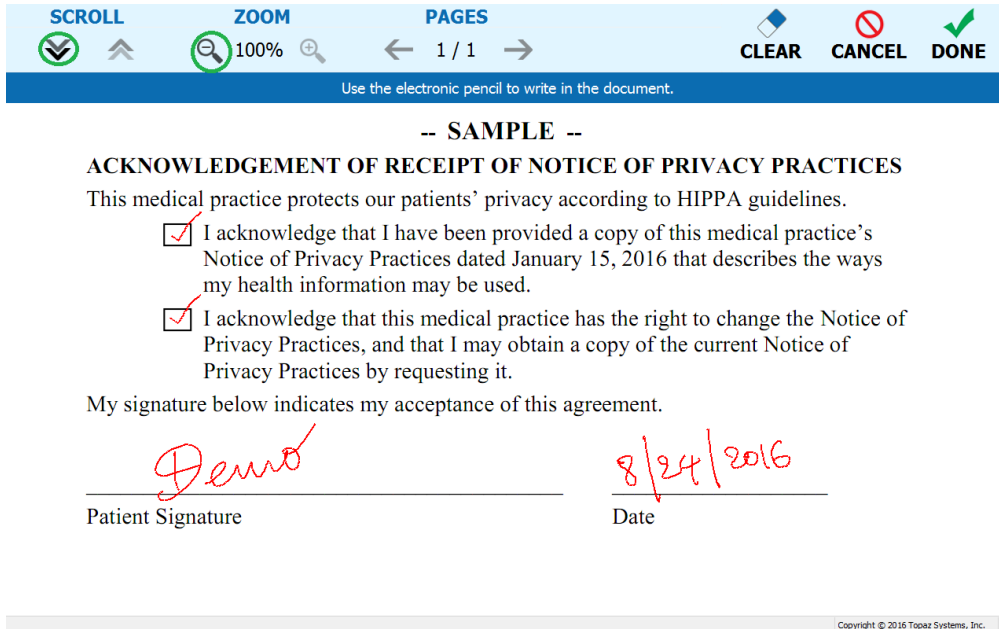
Scroll page up and Scroll page down:
The scroll icons available on the signing screen can be used to scroll up or down the page. The page will move an inch either up or down depending on the icon tapped. If the beginning of the page is visible, the page up icon will appear in gray and will not be selectable. If you are at the bottom of the page, the page down icon will appear in gray and will not be selectable.

Zoom in and Zoom out:
When the document page displayed is larger than the Tablet Display screen, the signer can zoom in or zoom out the page by using the zoom icons available in the signing screen. The allowed zoom percentages are 50, 75, and 100. When the page is displayed in 50% zoom, the zoom out icon will appear in gray, and when the page is displayed in 100% zoom, the zoom in icon will appear in gray. pDoc Annotator Duo TD zooms in or out by 25% depending on the icon tapped.

Previous page and Next page:

The signer can navigate between the pages of a document using the previous page and next page icons available in the signing screen. The icon will appear in gray if it is not active for the current page, e.g., if you are on the last page the next page icon is gray.

6.1.3 – Closing and Saving PDF Documents

After the user annotates the document and taps on the "DONE" button, the pDoc Annotator Duo TD presents the following window (depending on the setting by the administrator in the pDoc Annotator Duo Administrator).
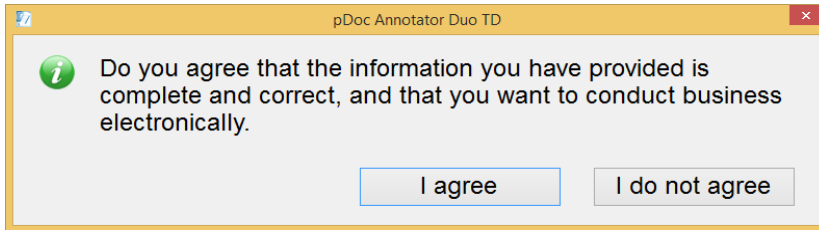
If the user taps the "I agree" button, pDoc Annotator Duo TD closes the signed document, and sends it back to the system operator where it is saved for future reference. pDoc Annotator Duo TD then closes the signing screen, and shows the Idle Screen to await the next document pushed to it. If the user taps the "I do not agree" button, pDoc Annotator Duo TD closes the message window so that the user can continue to read the document and make annotations in it.

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 cancel the signing session, they can tap the CANCEL button, whereupon pDoc Annotator Duo TD presents the following window:
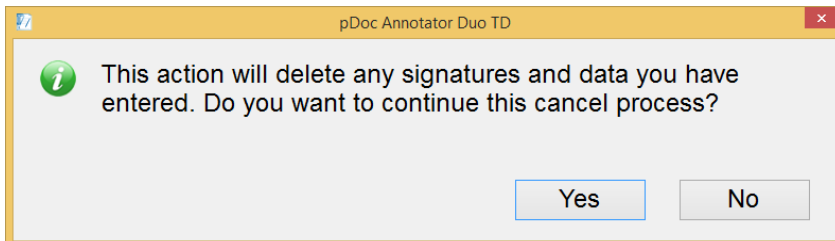
If the user taps the "Yes" button, pDoc Annotator Duo TD deletes pencil annotations that have been entered into the document, notifies the system operator that the signing session has been cancelled, and shows the Idle Screen to await the next document pushed to it. If the user taps the "No" button, pDoc Annotator Duo TD closes the message window so that the user can continue to read the document and annotate it.

6.2 – Pencil Annotations

6.2.1 – Adding Pencil Annotations

pDoc Annotator Duo supports freehand writing, marking, and drawing on the PDF page. When the document is displayed to the signer on the GemView Tablet Display, the document is ready to accept pencil annotations. Touch on the document with the GemView Tablet Display stylus where you want to begin pencil markup, continue writing and lift the stylus where you want to end the pencil markup. You can add any number of pencil annotations to the document.

6.2.2 – Clearing Pencil Annotations

To clear all the pencil annotations added in this signing session, tap on the "CLEAR" button to the left of "CANCEL" button on the toolbar. Tapping on "CLEAR" presents a prompt about the removal of all pencil annotations applied in that session and once the signer agrees to the prompt, all the pencil annotations applied in that session are cleared.

7.0 – pDoc Annotator Duo Idle Screen

7.1 – Idle Screen Display

The Idle Screen runs on the Tablet Display attached to the PC when either the Automatic Originator or the Manual Originator is running but not displaying a document for signing.

The Idle Screen displays one of the following, depending on the selection made by the system operator in the pDoc Annotator Duo Administrator:

- A default information screen
- A set of selected images that are rotated continuously; each image appears on the screen for a specified period of time. This is the default display.
- A video that runs continuously.

The Idle Screen also displays a System Tools button (the Topaz Gem logo) in the lower right corner. Double tapping on this logo will terminate the Idle Screen. Clicking on the pDoc Duo Idle Screen shortcut on the desktop resumes the display of the selected idle screen on the GemView Tablet Display.

Screenshots are shown below.

Sample Default Information Screen

Sample Image Screen

Sample Video Screen