



User Manual

pDoc Pro Client for Windows

Version 3.1

March 4, 2020

Copyright © 2020 Topaz Systems Inc. All rights reserved.

For Topaz Systems, Inc. trademarks and patents, visit www.topazsystems.com/legal.

Table of Contents

1.0 – The pDoc Pro eSign Software System Overview	2
1.1 – System Description	2
1.2 – System Components	2
1.3 – System Architecture	3
1.4 – System Operation.....	5
2.0 – pDoc Pro Client Software.....	6
2.1 – Client Usage: Signing and Annotating	6
2.2 – pDoc Client Screen	7
2.3 – Home Screen	7
3.0 – Installing/Uninstalling pDoc Pro Client Software.....	8
3.1 – Before You Begin	8
3.2 – Dedicated Windows User Account.....	8
3.3 – Installing the Signature Capture Device.....	8
3.4 – Installing pDoc Pro Client Software	9
3.5 – Make Dedicated pDoc Pro Client.....	10

Table of Contents

3.6 – Make Non-Dedicated pDoc Pro Client	11
3.7 – Uninstalling pDoc Pro Client Software	12
4.0 – pDoc Client Screen.....	13
4.1 – Basic Operations	15
4.1.1 – Opening PDF Documents.....	15
4.1.2 – Navigating and Viewing PDF Documents	16
4.1.3 – Closing and Saving PDF Documents.....	17
4.1.4 – Signing Session Timeout	19
4.1.5 – Minimize pDoc Client Screen	19
4.2 – Electronic Signatures for Signing Operation	19
4.2.1 – Signature Spots on the Client Screen.....	19
4.2.2 – Signature Capture Process	19
4.2.3 – Signature Capture Options.....	21
4.3 – Filling in Form Fields for Signing Operation	21
4.3.1 – Text Box.....	22
4.3.2 – Radio Button	22
4.3.3 – Check Box.....	22
4.3.4 – List Box.....	22
4.3.5 – Combo Box.....	22
4.4 – Adding Pencil Annotations for Annotation Operation	22
4.5 – Display of Scroll Bar in the Client Screen	22
5.0 – Home Screen.....	23
5.1 – Home Screen Display	23
5.2 – Default Home Screen Type	25
5.3 – System Settings for a Dedicated pDoc Pro Client.....	26

Table of Contents

5.4 – System Settings for Non-Dedicated pDoc Pro Client	28
6.0 – Behavior of pDoc Pro Client on a Tablet Display.....	30
7.0 – Configuring the Client to Optimize User Experience.....	31
7.1 – Display	31
7.1.1 – Adjust Screen Resolution	31
7.1.2 – Make Text and Other Items Larger or Smaller	32
7.2 – Screen Saver	33
7.3 – Power Options.....	34
7.4 – Lock Screen	36
7.5 – User Account Control	37

1.0 – The pDoc Pro eSign Software System Overview

1.1 – System Description

The pDoc® Pro eSign Software System 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 sign or annotate. The user completes a document by filling in text boxes, selecting check boxes and radio buttons, selecting items from lists, and signing or annotating the document. When the user has finished and taps the DONE button icon, the client sends the completed document back to the originator's 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 or annotating.

1.2 – System Components

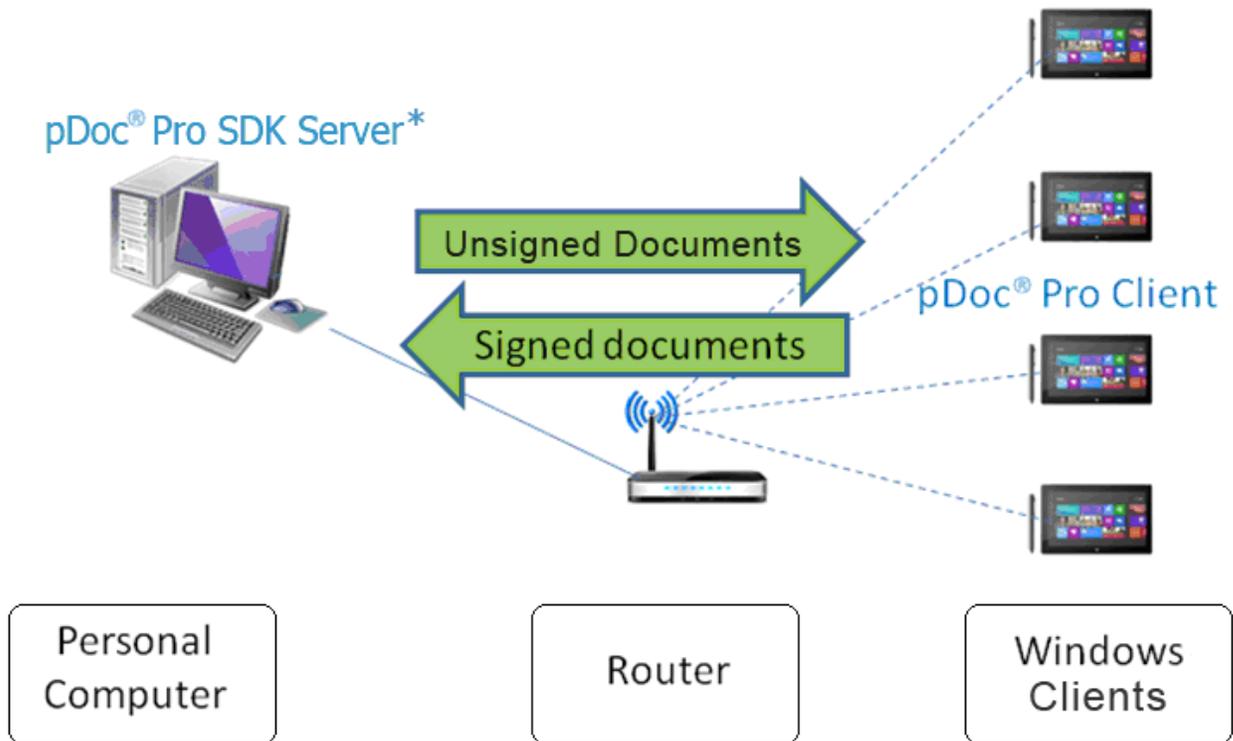
The pDoc Pro eSign Software System comprises:

- One or more pDoc Pro Clients. The two components of a pDoc Pro Client are
 - A Windows client PC, 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 10 or Topaz GemView 16 for collecting a handwritten signature for signing or for capturing pencil annotations.

Note: Other manufacturers may use other names for tablet displays, e.g., Pen Display.
 - The pDoc Pro Client Software that runs on the client as a dedicated or non-dedicated application
- One or more pDoc Pro Servers. The components of a pDoc Pro Server are
 - A Windows PC
 - The pDoc Pro Administrator Demo Software
 - The pDoc Pro Manual Originator Software
 - The pDoc Pro Automatic Originator Demo Software
 - The pDoc Pro Server SDK

1.3 – System Architecture

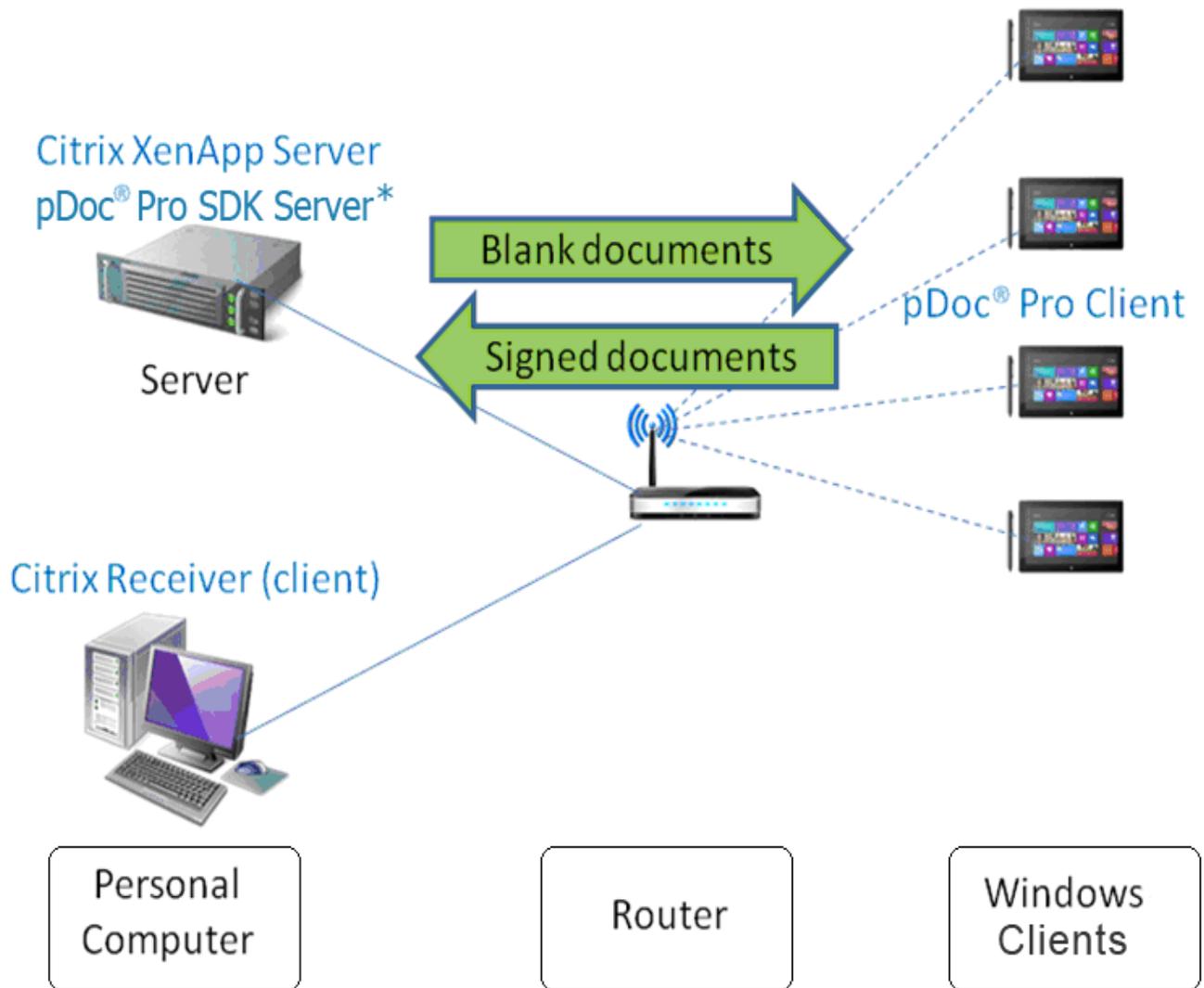
In the standard configuration shown below, the pDoc Pro Server runs on a desktop PC and pushes blank documents to the clients (Windows tablets in this example) and receives signed or annotated documents back from the clients. The network connections can be wired or wireless; the host PC and the clients 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 Server software runs on a Citrix Xen App Server and pushes blank documents to the clients and receives signed or 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
 - a. The system operator selects a document for the customer to fill in and selects the client device (tablet or PC) the customer will use to fill in and sign or annotate the document
 - b. The system operator clicks the Push Document to Client button, which sends the blank document to the client
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 or annotate the document on the client
 - b. Customer taps on the DONE button, which sends the signed or annotated document back to the pDoc Pro Server
3. Saving the Signed/Annotated Document on the PC
 - a. The pDoc Pro Server Software receives the signed or 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 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 an 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 Client Software

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

Depending on the client usage set when pushing the PDF, the pDoc Pro Client will act as either a Signing client or an Annotating client.

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

- pDoc Client Screen
- Home Screen

2.1 – Client Usage: Signing and Annotating

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

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

2.2 – pDoc Client Screen

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

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

2.3 – Home Screen

The Home Screen application runs when the pDoc Pro Client is not serving any signing or annotating requests if the client is a dedicated pDoc Pro Client. It displays a default information screen (with the pDoc Pro Client version details, client name, and IP Address), displays selected images rotating continuously, or runs a video depending on the option specified by pDoc Pro system administrator.

3.0 – Installing/Uninstalling pDoc Pro Client Software

3.1 – Before You Begin

- pDoc Pro Client Software runs on Windows 7, 8, 8.1, and 10 client devices, e.g., Microsoft Surface and desktop PCs.
- Your client 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 Client Software, uninstall any older versions of pDoc Pro Client on your device.

3.2 – Dedicated Windows User Account

Before installing pDoc Pro Client on a client, we suggest creating a dedicated Windows user account with administrator privileges to install the software. After installing pDoc Pro Client software in a user account on a client, depending on the option selected while making the tablet a pDoc Pro Client, the client either becomes an exclusive or non-exclusive signing device. If you want to revert the client to normal Windows operation (if the client is an exclusive signing device), you can log-in to another user account.

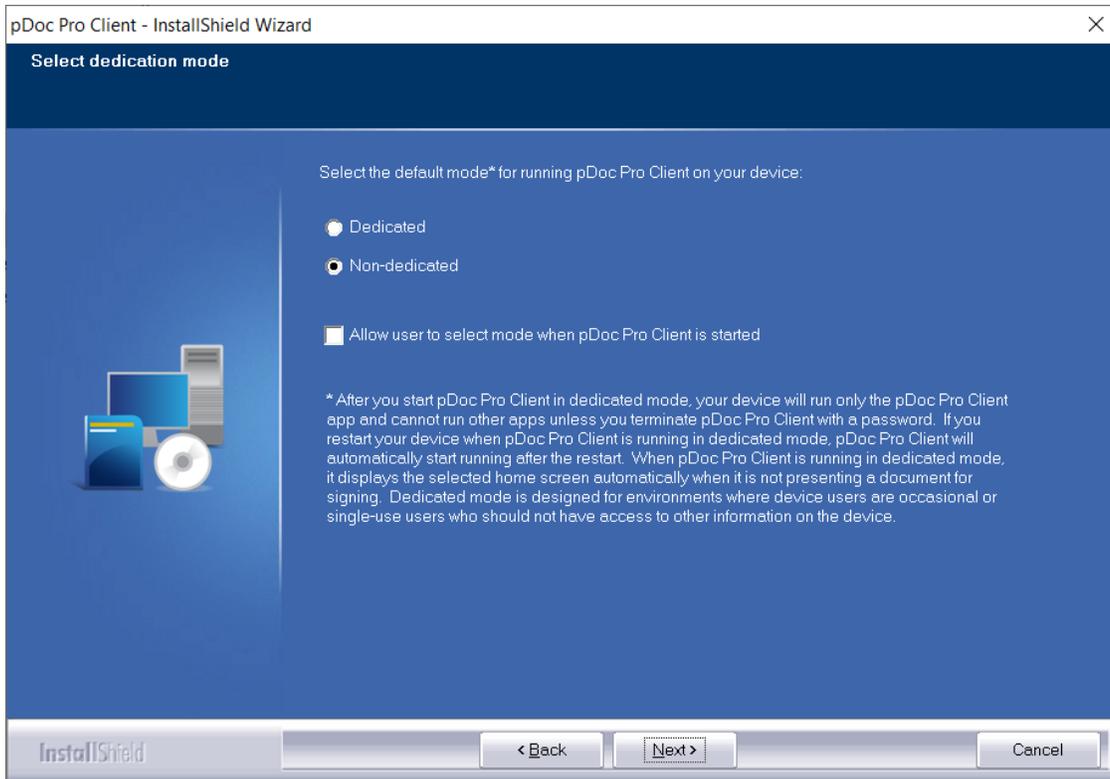
3.3 – Installing the Signature Capture Device

This step is optional if the pDoc Pro Client is a Windows Tablet and mandatory if the pDoc Pro Client is a PC. By default, the pDoc Client Screen application of the pDoc Pro Client captures signatures from the client touch screen in a Windows Tablet. However, if there is a Topaz signature pad or tablet display attached to the client, the pDoc Client Screen can capture signatures from it. The pDoc Pro Server Administrator can select whether or not to check for a signature pad attached to the client.

The pDoc Client Screen uses the signature pad or tablet display software drivers that provide communication between the client and the signature pad or tablet display, so the drivers must be installed on the client before you can capture signatures from the signature pad or tablet display. If you have not installed the signature capture device, refer to the instructions on Topaz's software website: www.sigpluspro.com.

3.4 – Installing pDoc Pro Client Software

Installing pDoc Pro Client software is accomplished by running the pDoc Pro Client installation file (www.topazsystems.com/software/pdoc/pdocproclient.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 a license key, optionally set a special folder for installation, choose the default home screen type, and provided with an option to select the dedication mode as shown in the screen shot below.



The sequence of screens displayed guide the user through the installation process.

3.5 – Make Dedicated pDoc Pro Client

Make the client a dedicated client in the following ways:

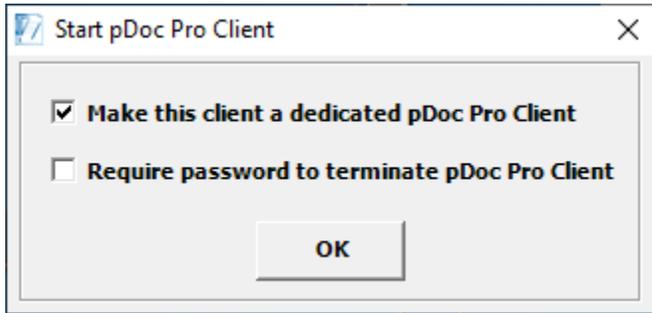
Method 1

During the installation of the pDoc Pro Client software, select the "Dedicated" option in the "Select dedication mode" screen. Once the pDoc Pro Client installation is completed, run the "Start pDoc Pro Client" utility installed as part of the software. The shortcut for this utility can be found on the desktop of the client. This utility will make the client a dedicated pDoc Pro Client and then restart the client. After the client is restarted, the home screen application runs automatically and depending on the home screen type selected during the installation, the home screen either displays the information screen, runs selected images continuously, or displays the default informational video. With this method, the user will always be prompted for the password during the termination of the client application.

Method 2

During the installation of the pDoc Pro Client software, check the "Allow user to select mode when pDoc Pro Client is started" check box along with either the "Dedicated" or "Non-dedicated" option in the "Select dedication mode" screen. Once the pDoc Pro Client installation is completed, run the "Start pDoc Pro Client" utility installed as part of the software. The shortcut for this utility can be found on the desktop of the client. In this utility, check the option "Make this client a dedicated pDoc Pro Client" and click on the "OK" button. By default, this option is checked or unchecked based on the option selected during the installation mode. This utility will make the client a dedicated pDoc Pro Client and then restart the client. After the client is restarted, the home screen application runs automatically and depending on the home screen type selected during the installation, the home screen either displays the information screen, runs selected images continuously, or displays the default informational video. With this method, the user will be prompted for the password during the termination of the client application only when "Require password to terminate pDoc Pro Client" check box is in checked mode.

Note: This dedicated mode option will typically be used for tablets that will be dedicated to form filling and signing, and will be used for short periods by many different users.



3.6 – Make Non-Dedicated pDoc Pro Client

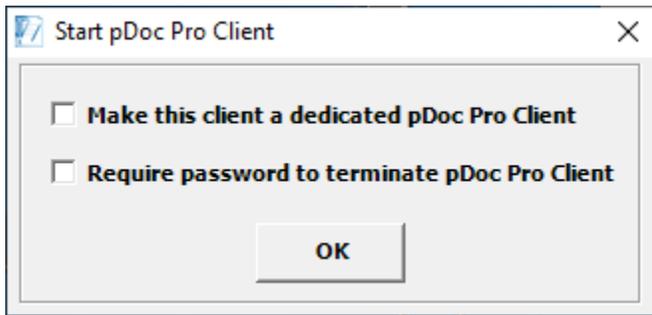
To make the client a non-dedicated pDoc Pro Client (i.e., the PC will operate as a normal Windows PC with pDoc Pro Client as another application running), use one of the following two methods:

Method 1

During the installation of the pDoc Pro Client software, select the "Non-dedicated" option in the "Select dedication mode" screen. Once the pDoc Pro Client installation is completed, run the "Start pDoc Pro Client" utility installed as part of the software. The shortcut for this utility can be found on the desktop of the client. With this method, the user will never be prompted for the password during the termination of the client application.

Method 2

During the installation of the pDoc Pro Client software, check the "Allow user to select mode when pDoc Pro Client is started" check box along with either the "Dedicated" or "Non-dedicated" option in the "Select dedication mode" screen. Once the pDoc Pro Client installation is completed, run the "Start pDoc Pro Client" utility installed as part of the software. The shortcut for this utility can be found on the desktop of the client. In this utility, uncheck the option "Make this client a dedicated pDoc Pro Client" and click on the "OK" button. By default, this option is checked or unchecked based on the option selected during the installation mode. With this method, the user will be prompted for the password during the termination of the client application only when the "Require password to terminate pDoc Pro Client" check box has been checked.



3.7 – Uninstalling pDoc Pro Client Software

To uninstall pDoc Pro Client from your client:

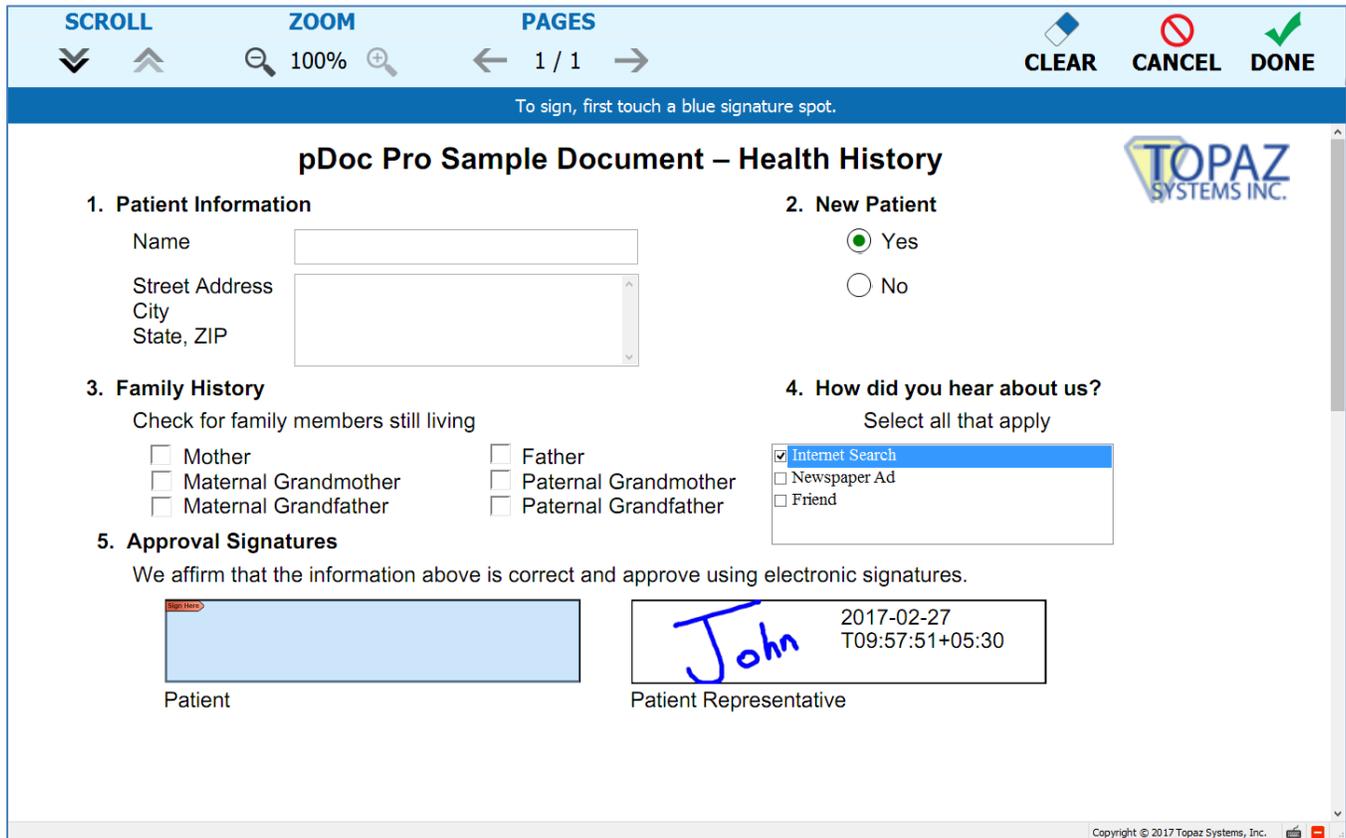
1. Go to Control Panel → Programs and Features
2. Select pDoc Pro Client
3. Click on the “Remove” button, and follow the instructions to uninstall the software.

Uninstalling pDoc Pro Client Software does not affect documents that have already been filled in and signed; signatures that have been placed into documents are not removed during un-installation.

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

4.0 – pDoc Client Screen

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



The screenshot displays the pDoc Pro Client interface. At the top, there is a navigation bar with 'SCROLL', 'ZOOM', and 'PAGES' options. The 'ZOOM' is set to 100%. On the right, there are 'CLEAR', 'CANCEL', and 'DONE' buttons. Below the navigation bar, a blue bar contains the instruction: 'To sign, first touch a blue signature spot.'

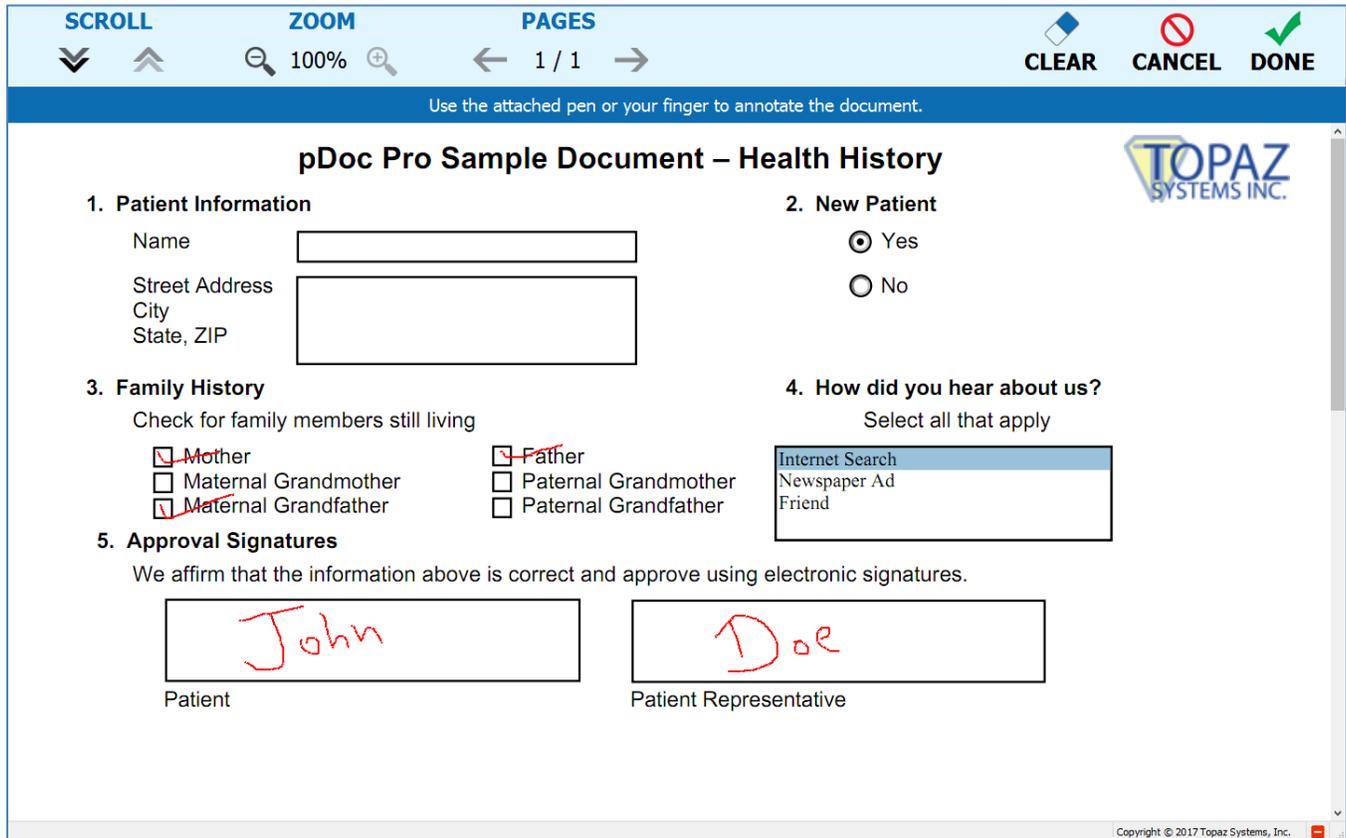
The main content area is titled 'pDoc Pro Sample Document – Health History' and features the TOPAZ SYSTEMS INC. logo in the top right corner. The document is divided into five sections:

- 1. Patient Information**: Includes input fields for Name, Street Address, City, and State, ZIP.
- 2. New Patient**: Includes radio buttons for 'Yes' (selected) and 'No'.
- 3. Family History**: Includes a checkbox for 'Check for family members still living' and checkboxes for Mother, Maternal Grandmother, Maternal Grandfather, Father, Paternal Grandmother, and Paternal Grandfather.
- 4. How did you hear about us?**: Includes a dropdown menu with 'Internet Search' selected, and checkboxes for 'Newspaper Ad' and 'Friend'.
- 5. Approval Signatures**: Includes the text 'We affirm that the information above is correct and approve using electronic signatures.' Below this, there are two signature boxes: one for the Patient (a blue box) and one for the Patient Representative (containing a blue signature 'John', the date '2017-02-27', and the time 'T09:57:51+05:30').

At the bottom right of the screen, there is a copyright notice: 'Copyright © 2017 Topaz Systems, Inc.'

User Interface for the Signing Operation

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



User Interface for the Annotating Operation

The difference between the signing operation and annotating operation is that in the case of the signing operation, all the form fields (including signature fields) are rendered in the user interface to accept input from the signer. In the case of the annotating operation, the form fields are not rendered and information cannot be entered into any of the form fields in the PDF. Only pencil annotations can be added to the document in this mode.

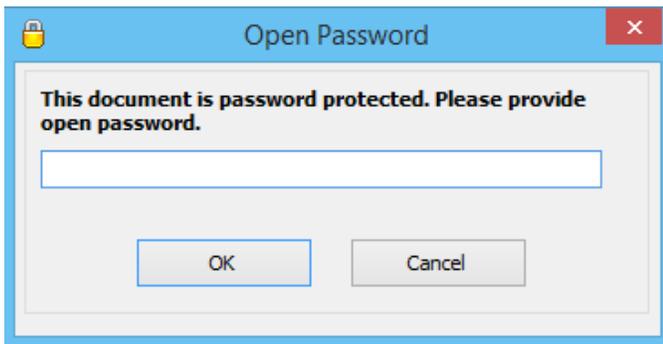
4.1 – Basic Operations

The basic operations described below are applicable to both signing and annotating operations.

4.1.1 – Opening PDF Documents

The pDoc Pro Client automatically opens a PDF document in the pDoc Client Screen when it receives the document pushed from the pDoc Pro Server. When it opens the PDF document, the pDoc Client Screen displays the first page of the document.

If the PDF document that is being opened is a secured document, the following dialog is displayed prompting for “Open Password” to open the document. If the user provides the correct password, then the document is opened, otherwise an error message will be displayed.

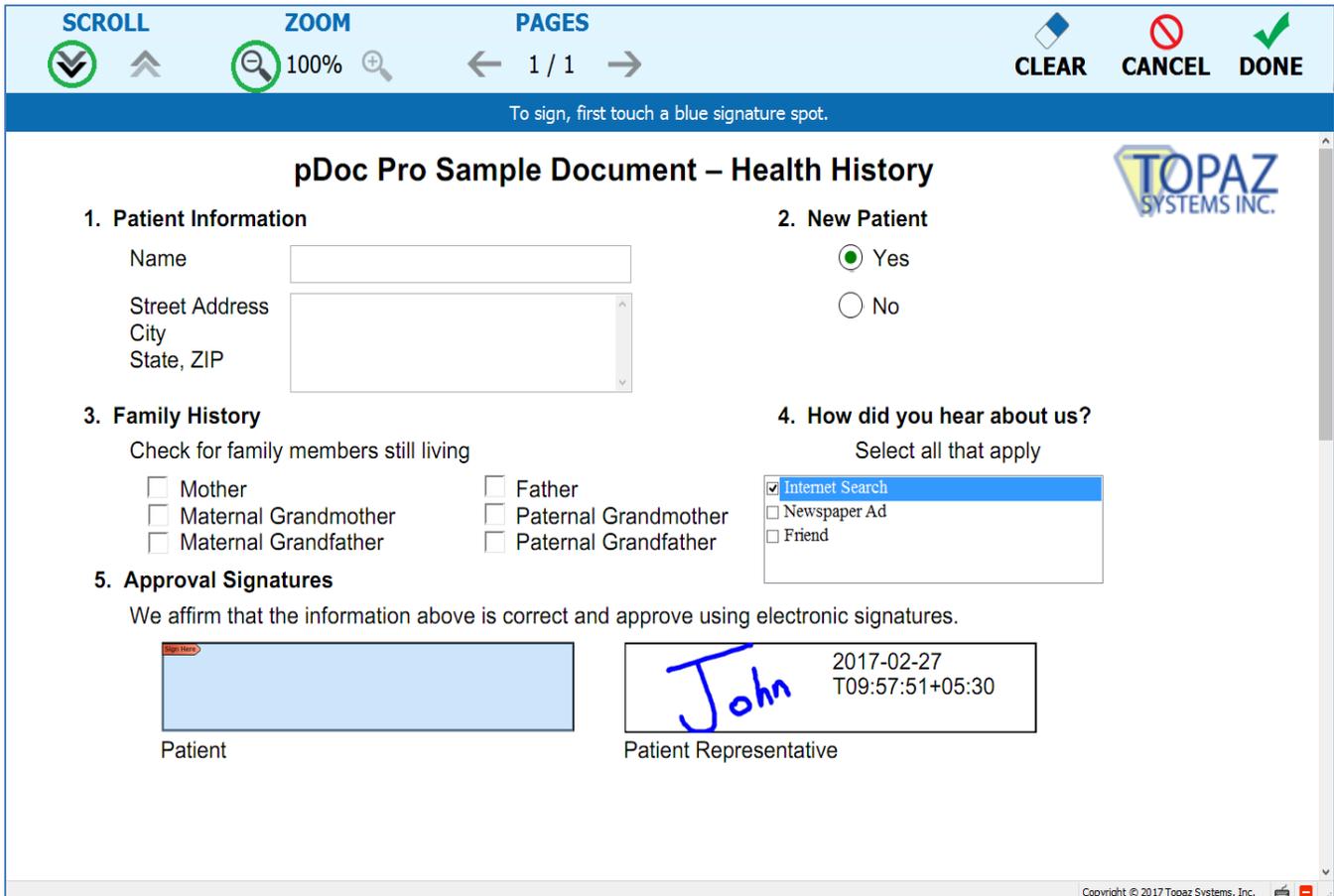


If the PDF document that is being opened also had a “Permissions Password” along with the “Open Password”, then features of the document are enabled or disabled based on the permissions set when the PDF document was secured.

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

4.1.2 – Navigating and Viewing PDF Documents

The icons available in the pDoc Client Screen 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 client 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 clicked. 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.

If you are using a Windows Tablet, you can use the tablet touch movements to move within a page. If you swipe up, the page will move up, and if you swipe down, the page will move down.

Zoom in and Zoom out:

The signer can zoom in or zoom out the page by using the zoom icons available in the client 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 Pro Client zooms in or out by 25% depending on the icon clicked.

If you are using a Windows Tablet, you can use the tablet touch movements to zoom in or zoom out. If you "pinch" your fingers towards each other while keeping contact with the screen, the page will be zoomed out by 25%. If you move your fingers away from each other, the page will be zoomed in by 25%.

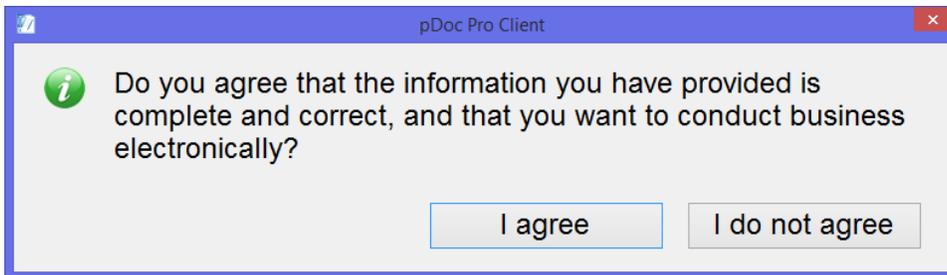
Previous page and Next page:

The signer can navigate between the pages of a document using the previous page and next page icons available in the client 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.

If you are using a Windows Tablet, you can use the tablet touch movements to navigate between pages. If you swipe to the left, you will be navigated to the next page. If you swipe to the right, you will be navigated to the previous page.

4.1.3 – Closing and Saving PDF Documents

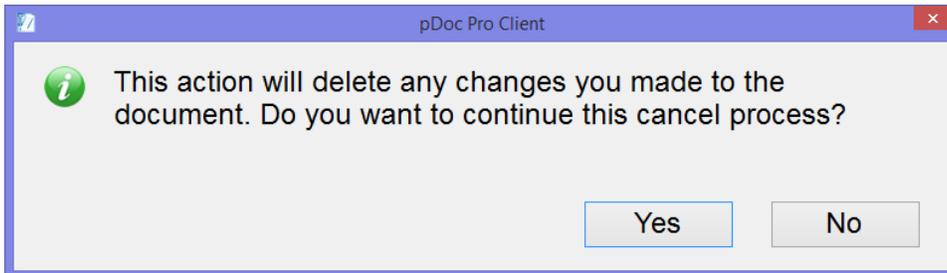
After the user fills in the form fields and signs the appropriate signature spots or annotates the document, and then taps the DONE button, pDoc Pro Client presents the following window.



If the user touches the "I agree" button, pDoc Pro Client closes the completed document, and sends it back to the pDoc Pro Server where it is saved for future reference. pDoc Pro Client then closes the client screen, deletes the local copy of the PDF, and shows the Home Screen (if it is a dedicated client) to await the next document pushed to it.

If the user touches the "I do not agree" button, pDoc Pro Client closes the message window so that the user can continue to read the document, sign it, and fill in form fields or annotate the document.

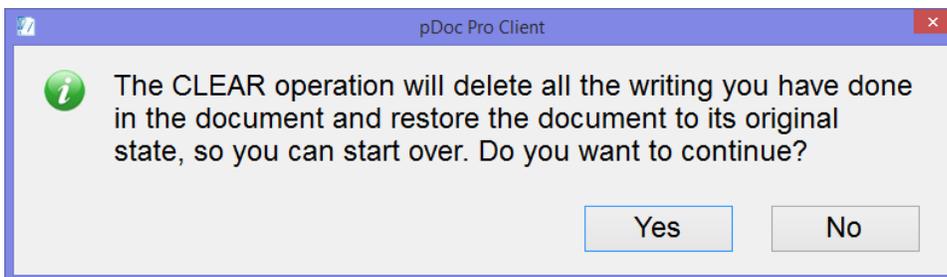
During the course of signing and entering data into a document or annotating a document, if a user decides they do not want to complete the form and want to terminate the current session, they can touch the CANCEL button, whereupon pDoc Pro Client presents the following window:



If the user touches the “Yes” button, pDoc Pro Client deletes all the actions performed on the document after it is displayed to the signer, notifies the pDoc Pro Server that the current session has been cancelled, deletes the local copy of the PDF, and shows the Home Screen to await the next document pushed to it.

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

During the course of signing and entering data into a document or annotating the document, if a user wants to undo all the actions performed on the document during the current session, they can touch the Clear button, whereupon pDoc Pro Client presents the following window:



If the user touches the “Yes” button, pDoc Pro Client undoes all the actions performed on the document in the current session.

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

The text displayed for the buttons (“DONE” and “CANCEL”) along with the messages displayed when the buttons are touched and the button captions in the message windows can be configured by the Administrator at the pDoc Pro Server.

4.1.4 – Signing Session Timeout

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

4.1.5 – Minimize pDoc Client Screen

The user can minimize the pDoc Client Screen by clicking on the Minimize button located on the bottom right corner of the application. The minimize button is visible only when the pDoc Pro Client is non-dedicated so that the user can access the desktop to perform other operations.

4.2 – Electronic Signatures for Signing Operation

4.2.1 – Signature Spots on the Client Screen

A principal feature of the pDoc Pro Client is its ability to capture electronic signatures written on the client screen (or on an attached signature pad or tablet display) and securely embed the signatures in digital signature spots in a document. When the pDoc Pro Client receives a PDF document containing signature spots, it opens the document in the pDoc Client Screen and displays the signature spots that are available for signing as blue rectangles.

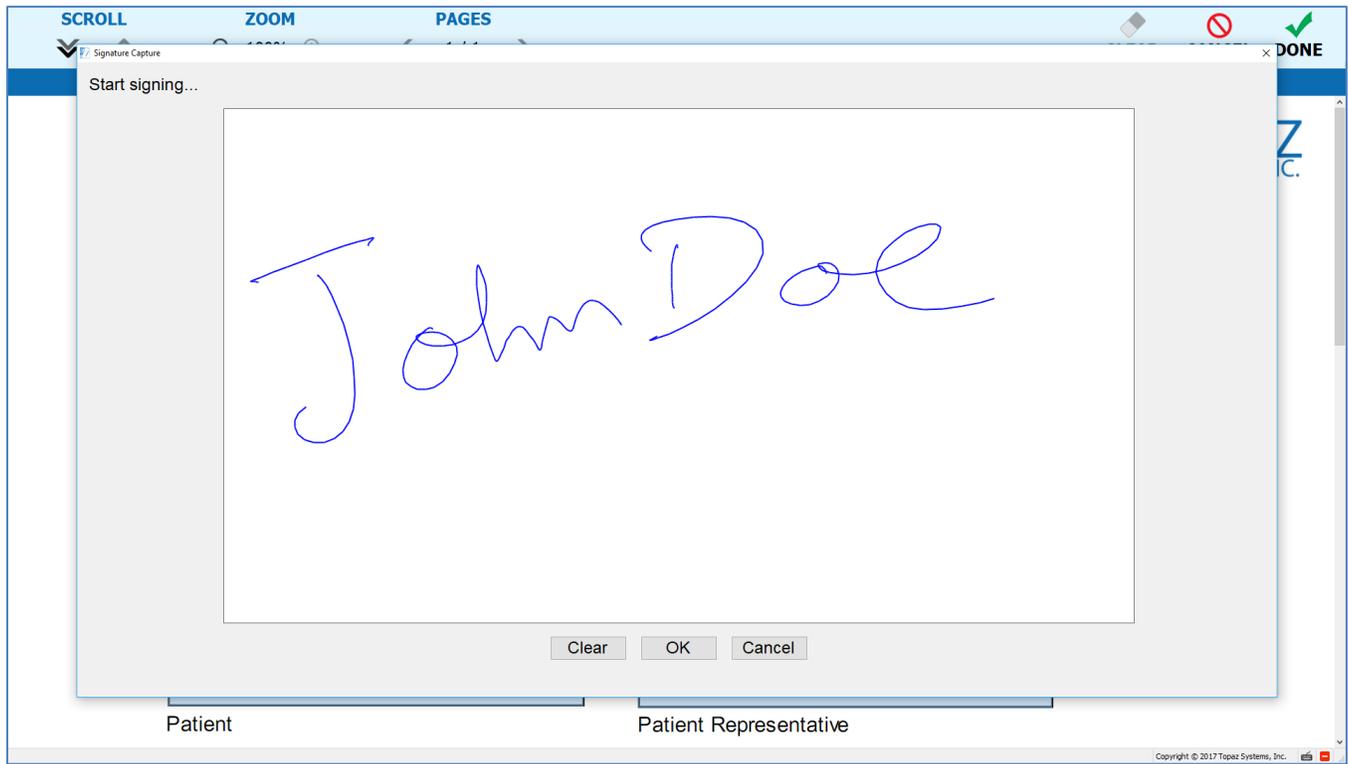
4.2.2 – Signature Capture Process

Touch a blue electronic signature box to initiate the act-of-signing. A signature capture window will open as shown in the screen shot below. Sign in the signature box using your finger or client stylus or sign on the attached signature pad as appropriate, and click the OK button to indicate that that you have completed your signature. pDoc Pro Client will close the signature capture window, embed the signature in the signature spot in the document, and display the updated document.

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

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

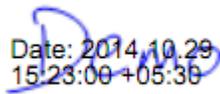
Once the act-of-signing is complete, the form fields in the document that are designated to be made read-only when this field is signed become read-only.



4.2.3 – Signature Capture Options

The appearance of the signature in the signature capture window and in the document can be changed by options specified in the pDoc Pro Server:

- The color of the electronic ink that appears in the signature capture window when you write your signature can be changed. The default color is blue.
- The location of the signature details (date, time, and other information about the signature) with respect to the signature itself can be changed. The options are
 - Behind: The signature details are placed in the center of the signature field with the details behind the signature squiggle as shown below.



- Beside: The signature squiggle is shown on the left side of the field and the details are shown beside it on the right side of the signature field as shown below.



- Image Only: Only the signature squiggle is shown in the signature field; details are not shown.



- Automatic: When this option is selected, the signature details will be displayed either beside or behind the squiggle depending on the width and height of the signature field.

Note: If the height of the signature field is less than 30 pixels or the width of the signature field is less than 50 pixels, there is not enough space to display the signature details even if the Behind or Beside option has been selected.

4.3 – Filling in Form Fields for Signing Operation

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

4.3.1 – Text Box

When you touch inside a text box, the signing screen shows a blinking cursor. Enter text into the text box using your keyboard.

4.3.2 – Radio Button

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

4.3.3 – Check Box

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

4.3.4 – List Box

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

4.3.5 – Combo Box

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

4.4 – Adding Pencil Annotations for Annotation Operation

Annotation capability is enabled by default during the Annotation Operation. To add pencil annotations to the document that needs to be annotated, touch anywhere on the document and drag the mouse or use the pen or your finger to create a pencil annotation, and then release it to complete the annotation. Repeat the same process for adding any number of annotations to the displayed document. The pencil markups appear on the page with the color and width specified in the pDoc Pro Server Administrator.

4.5 – Display of Scroll Bar in the Client Screen

By default, the Scroll Bar is displayed in the pDoc Client Screen. If the administrator changes the scroll bar settings in the pDoc Pro Server Administrator, the changed settings are applied during the display of the document. The options that can be set in the administrator demo are no scroll bar, default scroll bar, and custom scroll bar with custom specified width.

5.0 – Home Screen

5.1 – Home Screen Display

The Home Screen runs on a pDoc Pro Client when it is in idle mode and not serving a document signing request from a pDoc Pro Server.

The Home Screen displays one of the following, depending on the selection made during the installation of pDoc Pro Client and at the pDoc Pro Server:

- 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 Home Screen also displays a System Tools button (the Topaz gem logo) in the lower right corner of the screen.

In addition, the Home Screen displays the following beside the System Tools button:

- A network connectivity status indicator (i.e., signal strength)
- A battery status indicator (if the client is a Windows tablet or laptop PC with a battery)

Click on the respective indicator to display additional information. Clicking on the battery status indicator displays the battery percentage, battery life remaining, etc. Clicking on the network connectivity status indicator displays the connected network name, etc.

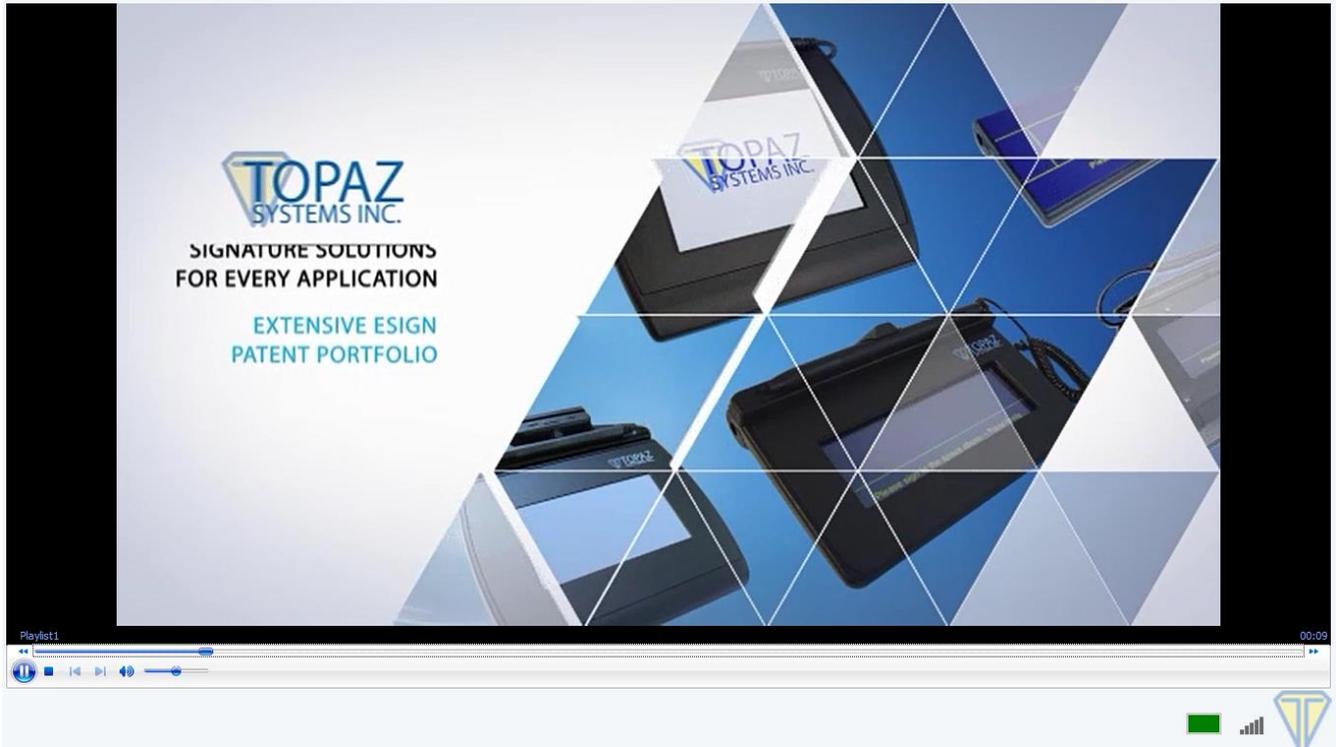
Screenshots are shown below.



Sample Default Information Screen



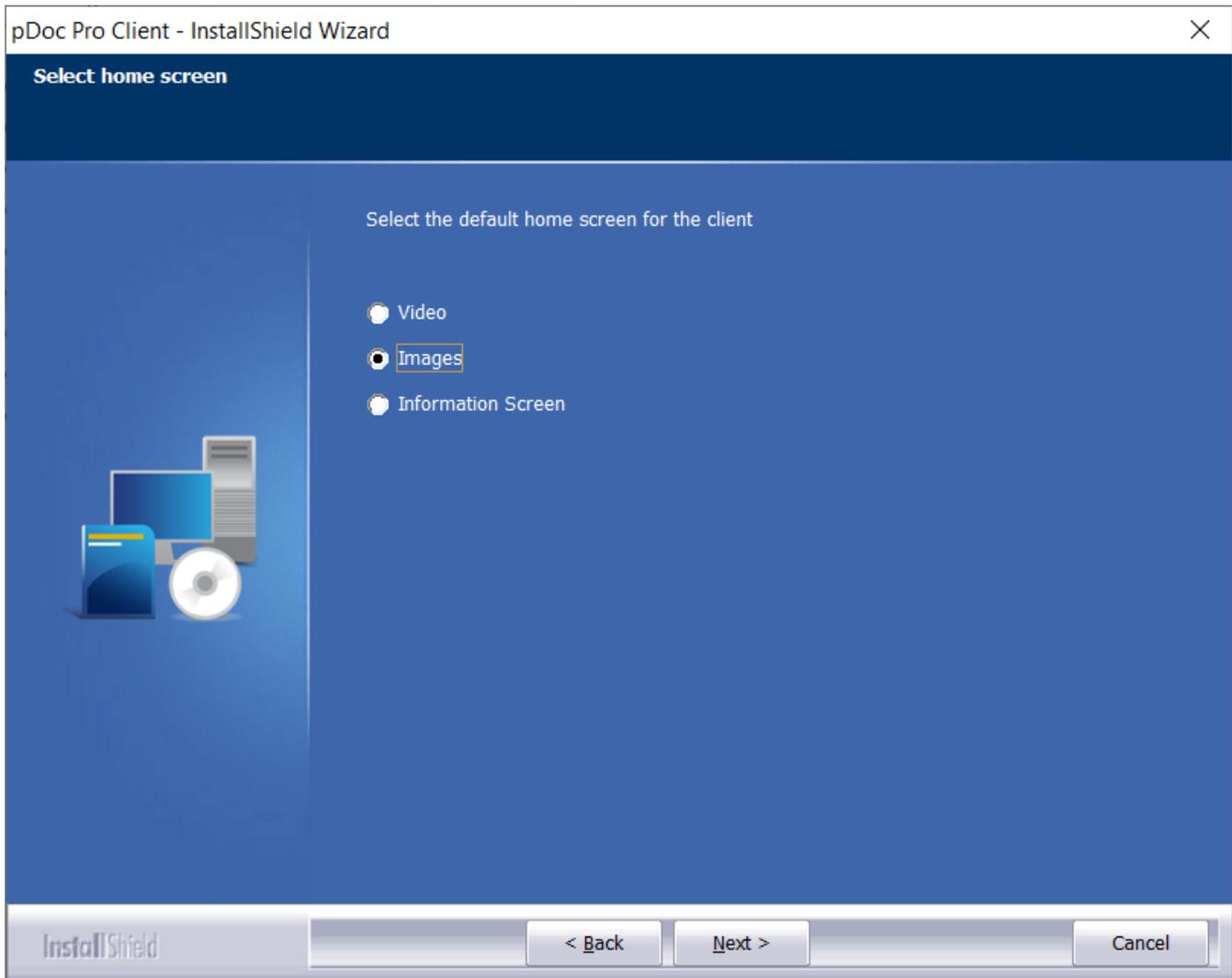
Sample Image Screen



Sample Video Screen

5.2 – Default Home Screen Type

During the installation of the pDoc Pro Client, a screen prompting you to select the default home screen for the client is displayed. The options available are “Video”, “Images” and “Information Screen”. When the home screen runs after the installation, this selection is applicable until the selection is changed by a pDoc Pro Server.



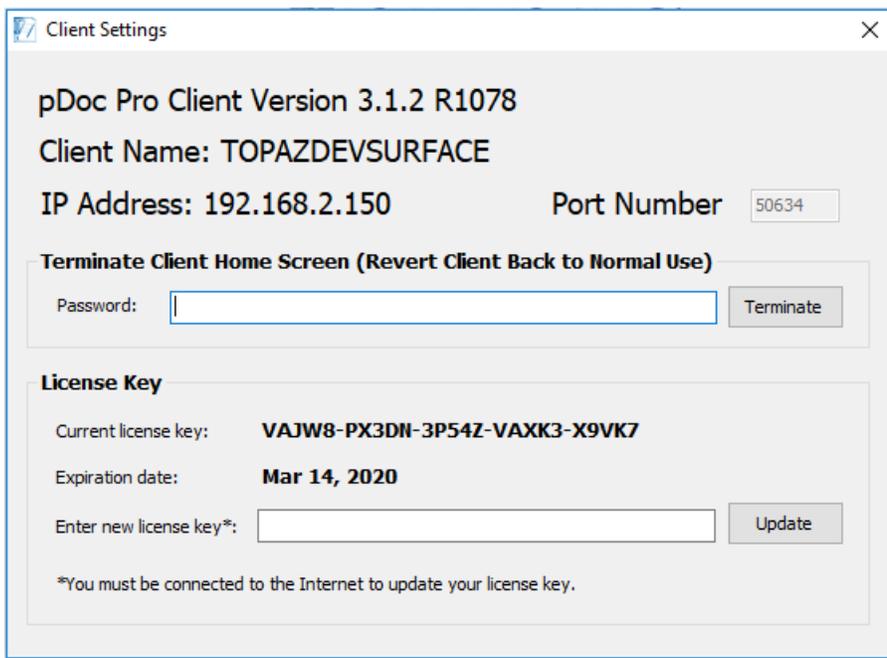
By default, when running the video, the video player bar is displayed; it can be turned off by the pDoc Pro Administrator Demo.

5.3 – System Settings for a Dedicated pDoc Pro Client

The system tools button located in the bottom right corner of the Home Screen allows a system administrator to update the license key for the pDoc Pro Client and to terminate the signing functionality on the client to revert it back to normal use.



When you double click on the system tools button a Client Settings Window like the one below will appear.

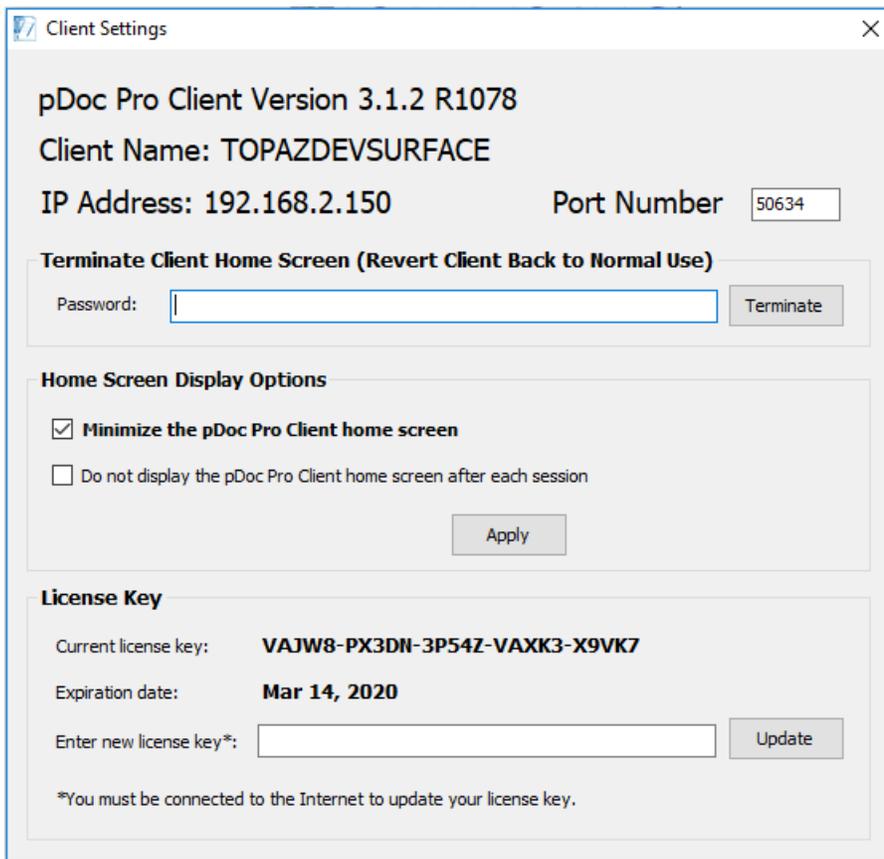


The license key update feature should be used when the evaluation license period has expired, and a permanent license key has been purchased and is to be entered into the system.

To terminate the Home Screen, you must enter the correct password. This is also an administrator operation, and should not be done by the typical person signing a document. The default password if not changed by the system administrator is “pdocsigner”.

5.4 – System Settings for Non-Dedicated pDoc Pro Client

The system tools button located in the bottom right corner of the Home Screen allows a system administrator to update the license key for the pDoc Pro Client, terminate the signing functionality on the client, and change the home screen display options. When you double click on the system tools button, a Client Settings Window like the one below will appear.



The screenshot shows a window titled "Client Settings" with the following content:

- pDoc Pro Client Version 3.1.2 R1078**
- Client Name: TOPAZDEVSURFACE**
- IP Address: 192.168.2.150** **Port Number**
- Terminate Client Home Screen (Revert Client Back to Normal Use)**
 - Password:
 -
- Home Screen Display Options**
 - Minimize the pDoc Pro Client home screen**
 - Do not display the pDoc Pro Client home screen after each session
 -
- License Key**
 - Current license key: **VAJW8-PX3DN-3P54Z-VAXK3-X9VK7**
 - Expiration date: **Mar 14, 2020**
 - Enter new license key*:
 -
 - *You must be connected to the Internet to update your license key.

The port number update feature should be used when the user wants to specify the static port number for the client. The port numbers should be specified within the given range (1058 to 65535). The client will be restarted automatically when the port number is updated. Once the port number is updated in the client, the client must to be detected once again by the Administrator to update the port number in the Administrator application.

The license key update feature should be used when the evaluation license period has expired, and a permanent license key has been purchased and is to be entered into the system.

To terminate the Home Screen, you must enter the correct password. This is also an administrator operation, and should not be done by the typical person signing a document. The default password if not changed by the system administrator is "pdcsigner".

To minimize the Home Screen immediately to the taskbar, check the "Minimize the pDoc Pro Client home screen" option and click on the "Apply" button. By default, this option is checked. To not display the Home Screen after each signing session, check the "Do not display the pDoc Pro Client home screen after each session" option and click on the "Apply" button. By default, this option is not checked.

6.0 – Behavior of pDoc Pro Client on a Tablet Display

A Tablet Display acts as an extended monitor when connected to the pDoc Pro Client. The Home Screen and pDoc Client screens are displayed on the Tablet Display device. The stylus provided with the Tablet Display is used for capturing signatures or drawing pencil annotations and other click events that are performed by the mouse.

When a Tablet Display is connected to the pDoc Pro Client, the home screen and pDoc Client Screen run on the Tablet Display by default. When you push a PDF, it is displayed on the attached Tablet Display.

The Home Screen and the Client Screen can be minimized if required.

The pDoc Pro Client software uses the GemView Tablet Display software drivers that provide communication between the pDoc Pro Client and Tablet Display, so the drivers must be installed on the pDoc Pro Client before you perform signing or annotating on the Tablet Display. If you have a Tablet Display device, its drivers must be installed according to the instructions in the Tablet Display User Manual before installing the pDoc Pro Client software.

7.0 – Configuring the Client to Optimize User Experience

To optimize the user experience on a tablet, the client system should be configured with the following settings. These steps are not mandatory, but will improve the user experience. Note that various manufacturers customize the operating system, so the descriptions below may vary somewhat on your client devices.

7.1 – Display

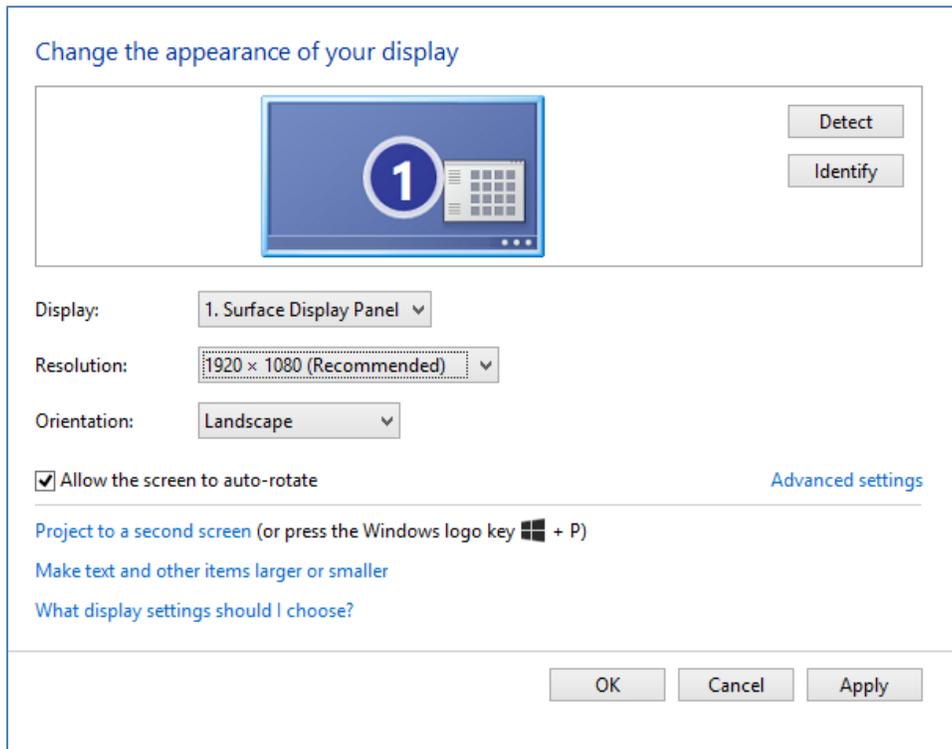
7.1.1 – Adjust Screen Resolution

pDoc Pro Client is tested with Windows clients from different vendors (Microsoft, Dell, Lenovo, etc.) having various resolutions. The display of the pDoc Pro user interface and associated font settings are optimized for 2160 x 1440, 1920 x 1080, and 1366 x 768 resolutions. The functionality supports other resolutions as well; however, you may find that the font size or other aspect of the user interface is suboptimal.

To change the resolution in a Windows client, follow these steps:

1. Swipe in from the right edge of the screen, tap "Settings", and then tap "Control Panel". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
2. Tap on "Display" to bring up the Display Settings window.
3. Select "Adjust Screen Resolution".
4. Select the desired resolution in the list of resolutions available. Typically, the highest resolution is recommended.
5. Make sure that the "Allow the screen to auto-rotate" option is checked. When this option is checked, you can rotate the screen to landscape or portrait as required during signing.
6. Click on the "Apply" button.

The screenshot below displays the recommended settings.



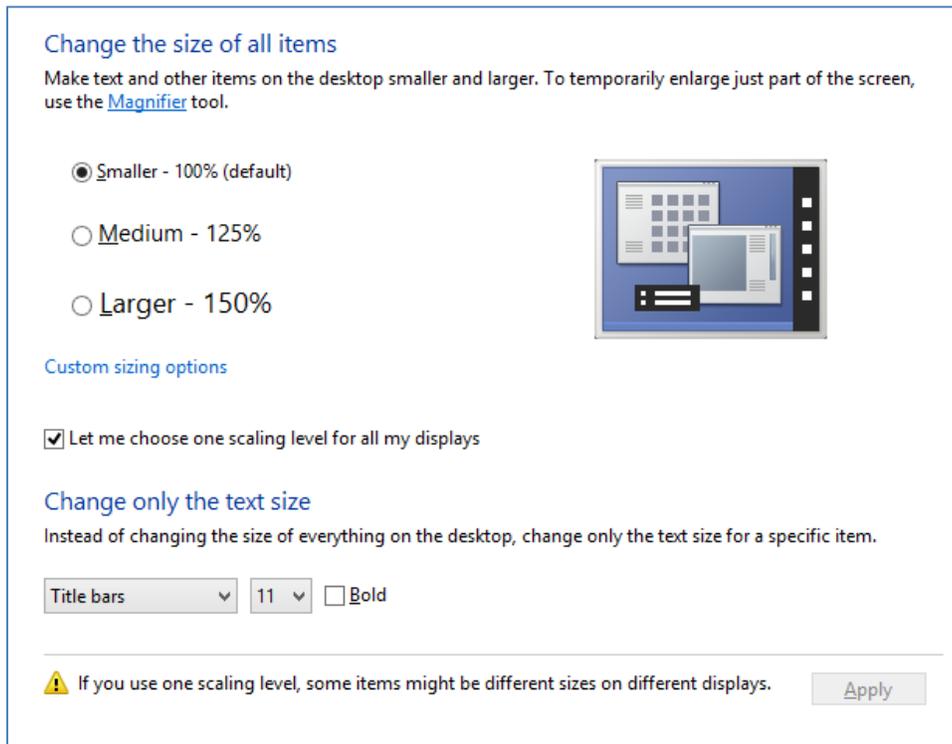
7.1.2 – Make Text and Other Items Larger or Smaller

In Windows 7 and higher operating system-based clients, you can make text and other items larger or smaller using the steps described below. The pDoc Pro Client user interface is better displayed when this setting is set to “Smaller – 100%”.

To set the size in a Windows Client, follow the steps below.

1. Swipe in from the right edge of the screen, tap "Settings", and then tap "Control Panel". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
2. Tap on “Display” to bring up the Display Settings window.
3. In the displayed window, select “Let me choose one scaling level for all my displays” and then select “Smaller – 100%”.
4. Click on the “Apply” button.

The screenshot below displays the recommended settings.

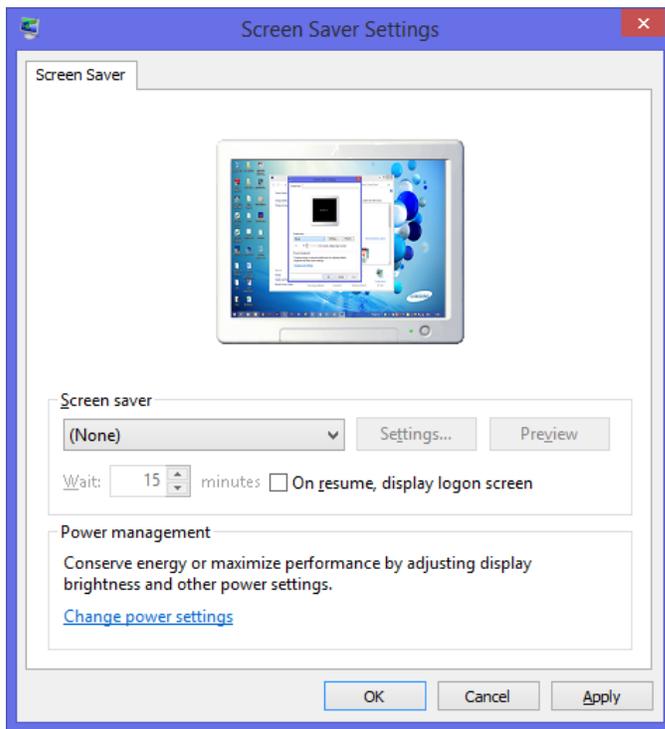


7.2 – Screen Saver

To make the client act like a dedicated signature capture device, we suggest disabling the screen saver. The screen saver can be disabled by using these steps:

1. Swipe in from the right edge of the screen, tap "Settings", and then tap "Control Panel". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
2. Tap on "Personalization" to bring up the Display Settings window.
3. In the displayed window, select "Screen Saver".

- In the displayed window, select Screen Saver as “None” as shown below.



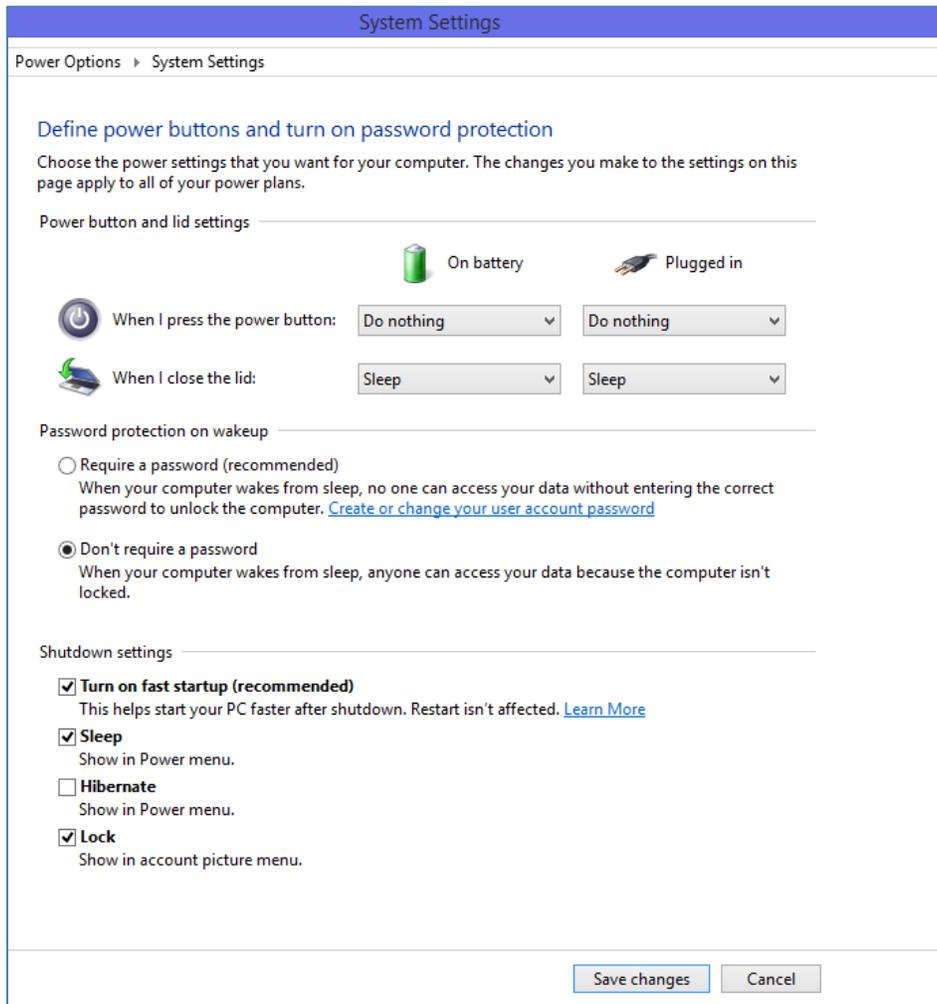
- Click on the “Apply” button.

7.3 – Power Options

To make the client act like a dedicated signature capture device, we suggest changing the power options as described below.

The power options can be modified by following these steps:

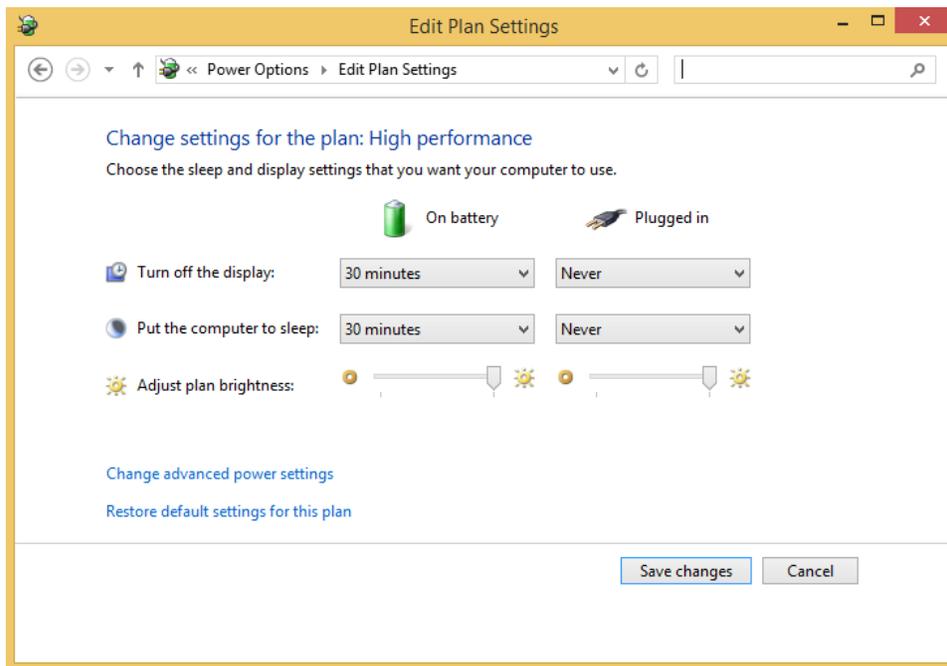
- Swipe in from the right edge of the screen, tap "Settings", and then tap "Control Panel". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
- Click/tap on “Power Options” to bring up the Power Options window.
- In the displayed window, click/tap “Require a password on wakeup”.
- Now, click on “Change settings that are currently unavailable” and then set the “When I press the power button” to “Do nothing” and Password protection on wakeup to “Don’t require a password” as shown below.
- Click/tap “Save changes”.



Now, to set when to “Power off the display” and when to “Put the computer to sleep”, follow these steps:

1. Swipe in from the right edge of the screen, tap "Settings", and then tap "Control Panel". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
2. Click/tap on “Power Options” to bring up the Power options window.
3. In the displayed window, click/tap “Choose when to turn off the display”.

- In the displayed window, change the settings as shown below.

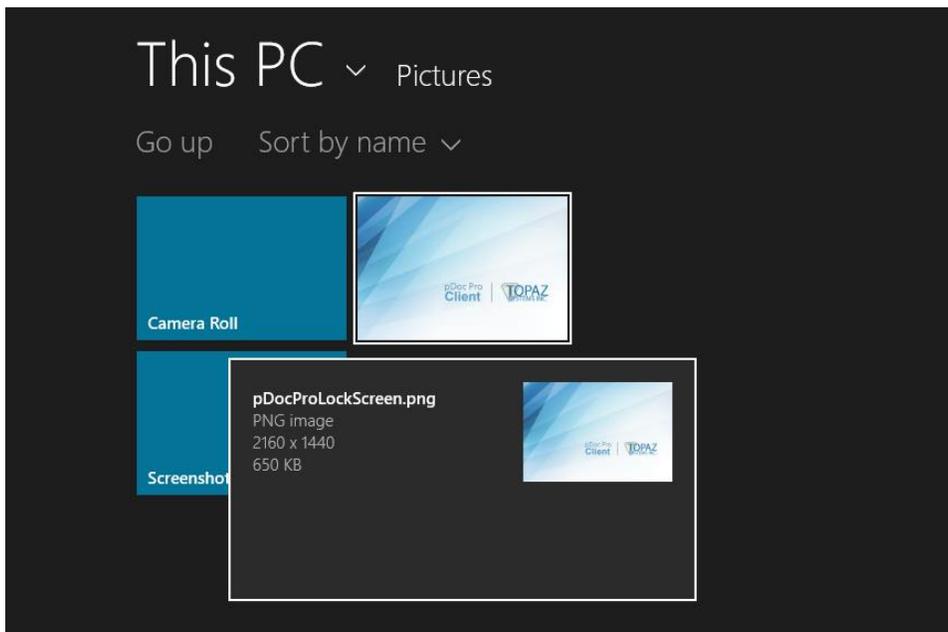
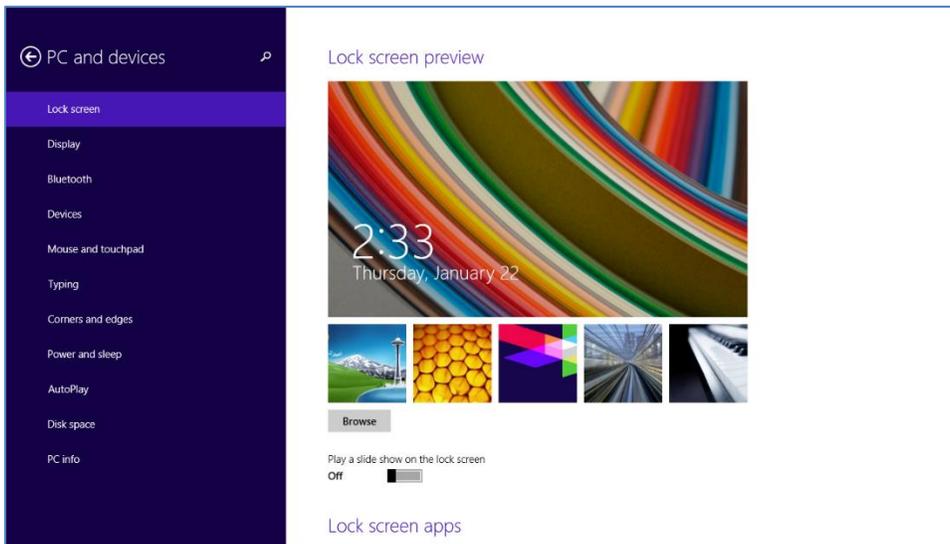


- Click on the “Apply” button.

7.4 – Lock Screen

You can customize the Windows Client lock screen and provide a custom image as the lock screen image. Follow these steps to change the lock screen:

- Swipe in from the right edge of the screen, tap "Settings", and then tap "Change PC Settings". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
- Click/tap on the “Lock screen” on the right hand side, in the displayed window.
- Click/tap on “Browse” and then using the options provided; select the image that you want to set as the lock screen. By default, pDoc Pro Client copies the default pDoc Pro lock screen image into the Pictures folder of the currently logged-in user. To select the default pDoc Pro lock screen, browse to it as follows: Click/tap on the “Browse” button and in the displayed screen, click on the “Go up” button and then select the Pictures folder. Select the pDocProLockScreen.



7.5 – User Account Control

During the process of making the Windows client (where pDoc Pro Client is installed) a dedicated pDoc Pro Client (by running the “Make pDoc Pro Client” utility), the user is prompted with a screen asking for the permissions to make changes to the system. The user is prompted with a similar screen when terminating the signing functionality on a client by using the settings screen in the Home Screen application. This screen is displayed because by default User Account Control (i.e., UAC) is set to notify you whenever apps try to make changes to your PC, but you can change how often UAC notifies you.

Follow these steps to make changes:

1. Swipe in from the right edge of the screen, tap "Settings", and then tap "Control Panel". (If you're using a mouse, point to the lower-right corner of the screen, move the mouse pointer up, click "Settings", and then click "Control Panel".)
2. Click/tap on "User Accounts" to bring up the User Accounts window.
3. Click/tap on the "Change User Account Control settings" link.
4. If prompted by UAC, then click/tap on Yes.
5. Move the slider down to set "Never notify", and click/tap on OK as shown in the screenshot below.

