KOFAX

Kofax SignDoc®
E-sign with Kofax

Kofax SignDoc 1.3.1

User's Guide

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Kofax SignDoc 1.3.1 - User's Guide
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1 Introduction

Kofax SignDoc transforms customer experiences by streamlining the signing of documents. SignDoc accelerates business workflows by removing steps such as printing, routing, and shipping documents back and forth. Constituents can sign electronically on any device anywhere resulting in significant operational cost reductions, productivity increases, and improved compliance.

Kofax SignDoc

- is designed to manage document-based transactions in a multi-channel environment.
- is the fastest way to get a signature from people in a convenient and secure process.
- is an end-to-end solution enabling preparation, execution and management of transactions in a digital environment across organizations and individuals.
- is compliant with federal e-signature legislation, which gives electronic documents and signatures the same legal standing as paper documents and ink signatures.
- provides a signed document containing all audit information if desired (self-contained document).
- supports multiple signature types such as click-to-sign, handwritten, and photo.
- can be operated behind the firewall (in-house) or in an enterprise cloud environment.

The Kofax SignDoc fundamentals are

- Intuitive UI (self manageable process)
- Customizable workflow (who, what, where, how & when, expiration, call back)
- Signer authentication (options and API)
- Sign anywhere and anytime – individually adapted to environment (click, mouse, photo, handwritten - be mobile and flexible)
- Audit trail included in signed documents
- Self-contained documents ("standard" PDF viewer also for audit trail)

For enterprise workflow applications Kofax SignDoc provides integration interfaces via web services.

Kofax SignDoc has been designed to be flexible - for Kofax SignDoc users and recipients of Signing Packages.

NOTE

Recipients of Kofax SignDoc do not need a Kofax SignDoc account.

2 General Overview

Kofax SignDoc provides complete workflow and management to create, send, track, and sign documents and forms digitally. Icons and help text pop-outs guide the user through every step of

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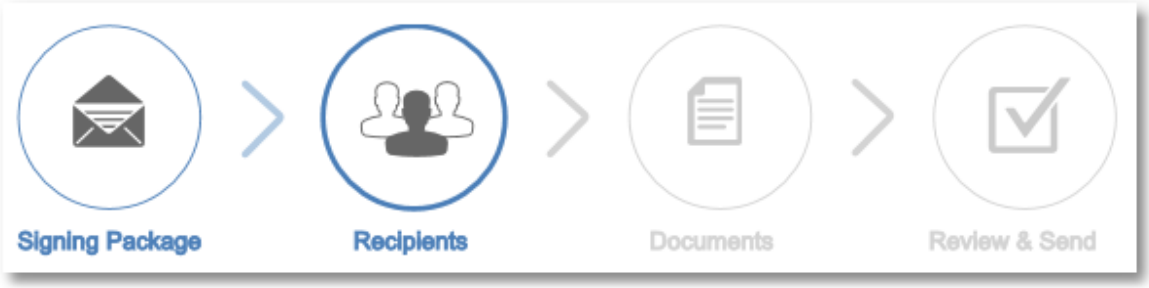
the process. Recipients of documents can sign electronically on any device anywhere resulting in significant operational cost reductions, productivity increases, and improved compliance.

2.1 Kofax SignDoc Wizards

Kofax SignDoc uses the concept of Wizards for two main tasks:

- one for creating Signing Packages and Template Packages

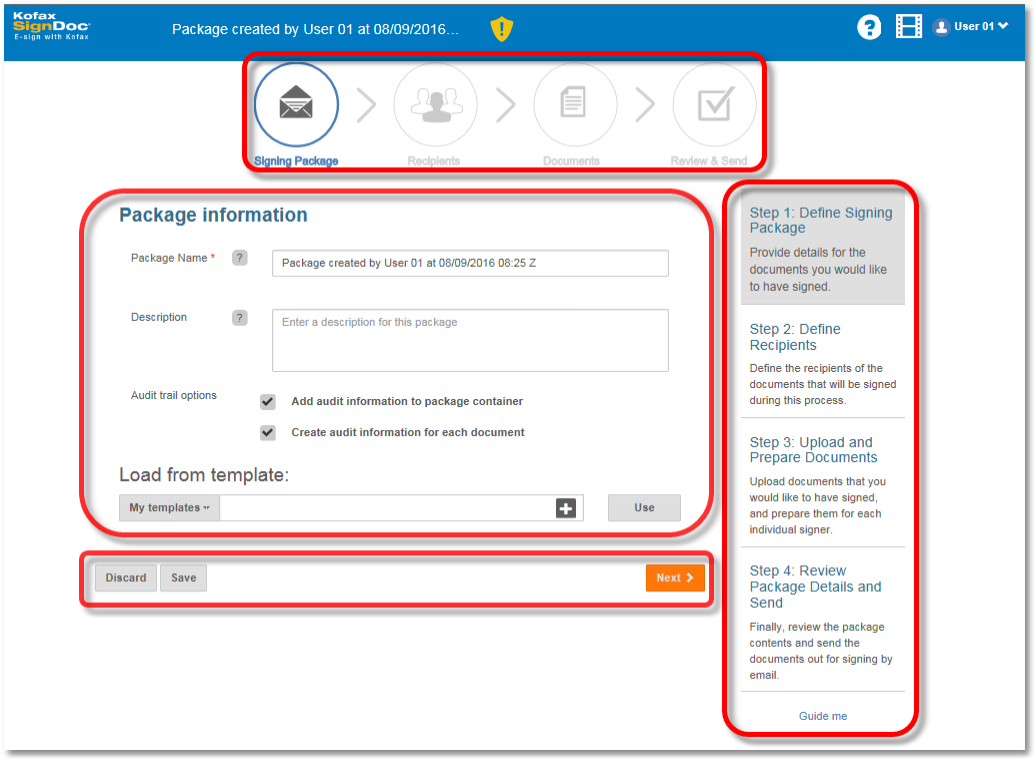


- and the other as guidance for the signing process

Wizard Page Overview

In general a Wizard page shows in following regions:

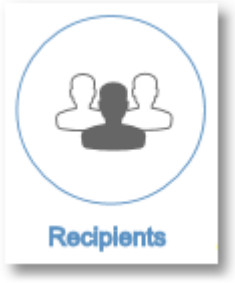
- Navigation bar on top
- Information panel on the right side
- Content region
- Navigation controls on bottom



Wizard Navigation Bar

The wizard progress will act as a means to graphically present the progress through the wizard, and also as a means of navigation. Each step in the wizard will be represented by a graphic and text.

The following states are possible.

		
Step completed	Currently active step	Step not yet visited

Wizard Navigation Controls

Below the content are the main navigation controls the user.

Button	Description
Discard	Discards the current signing package, with confirmation message box.

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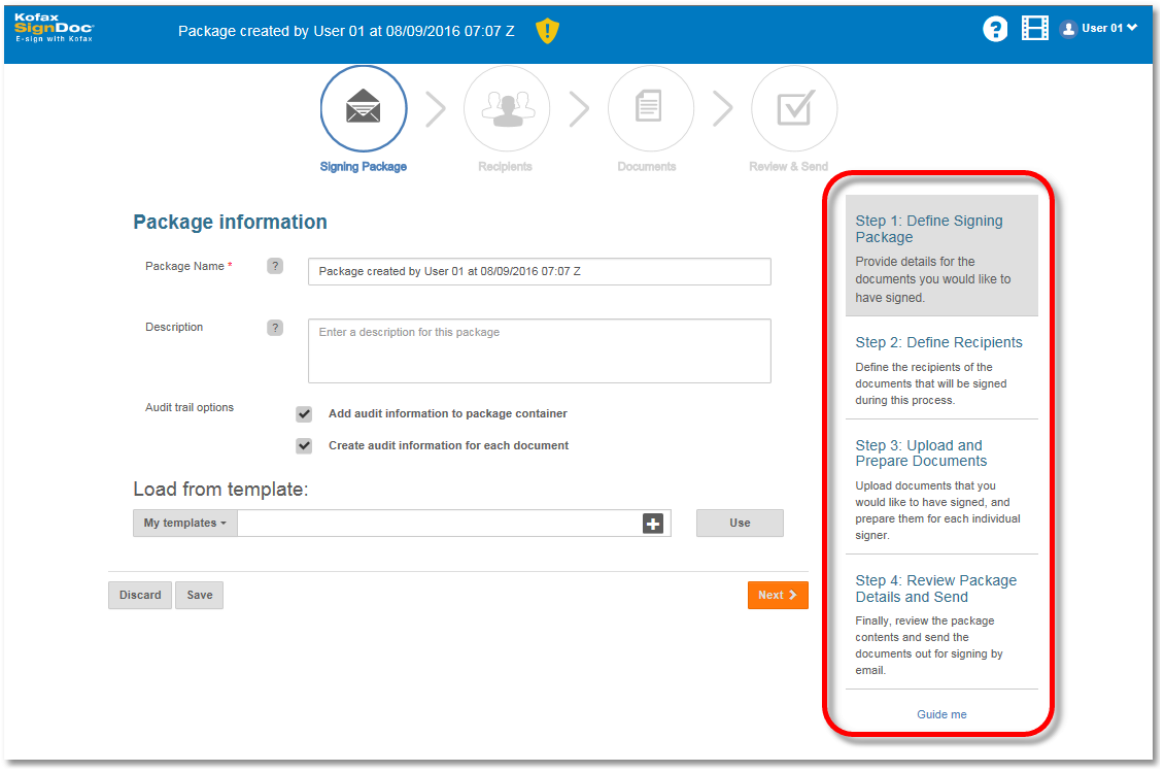
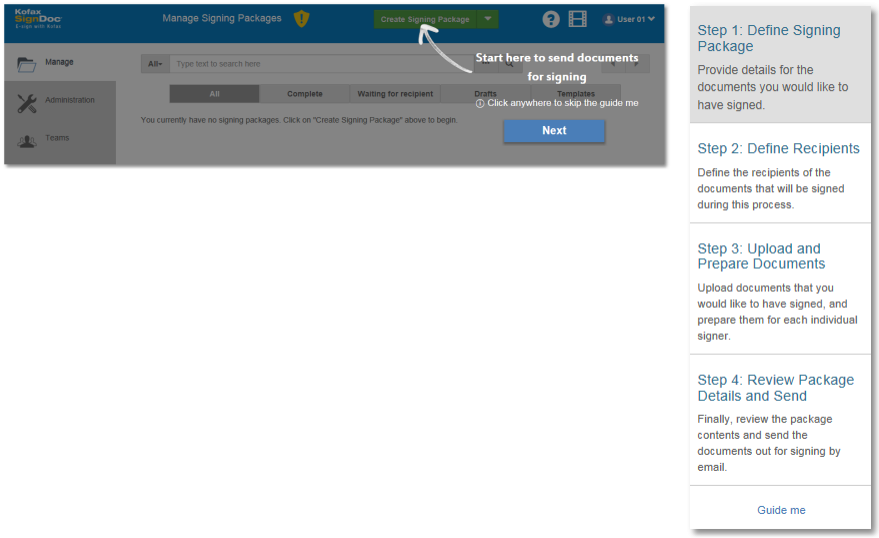
Button	Description
Save	Saves the current signing package, redirect to manage page, **Drafts** tab.
Previous	Goes to the previous step (hidden if in first step).
Next	Goes the the next step (hidden if in last step).
Complete	Only shown in the last step. **Send** for Signing Packages. **Save** for templates.

Wizard Information Panel

Each step in the wizard will include an Information panel. This shows concise instructions on how to complete the current step. And also if applicable the progress.



Within the panel there is a **Guide me** link, this will show an annotated overlay for the current page, describing the main controls and their purpose.

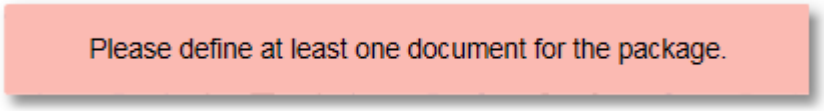


2.2 Soft Prompts, Red Stars, Triangle

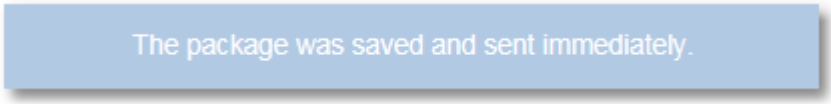
Soft prompts

After completion of each step in the wizard a soft prompt will be displayed overlaying the wizard progress icons. The soft prompt shows the result of the previous completed step.

- If an error occurs the soft prompt is red



- If it is information the soft prompt is blue



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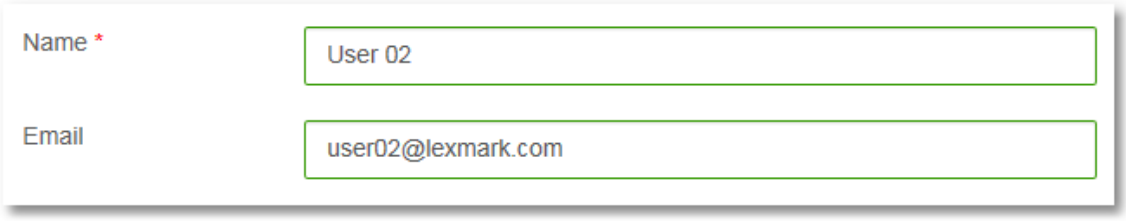
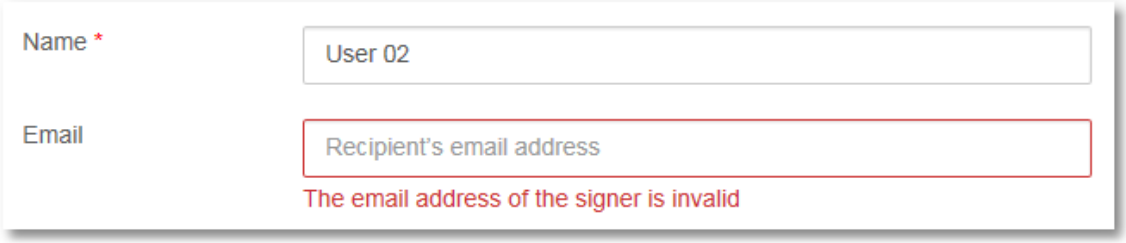
Red stars in graphical user interface

- Fields with a red star are mandatory fields



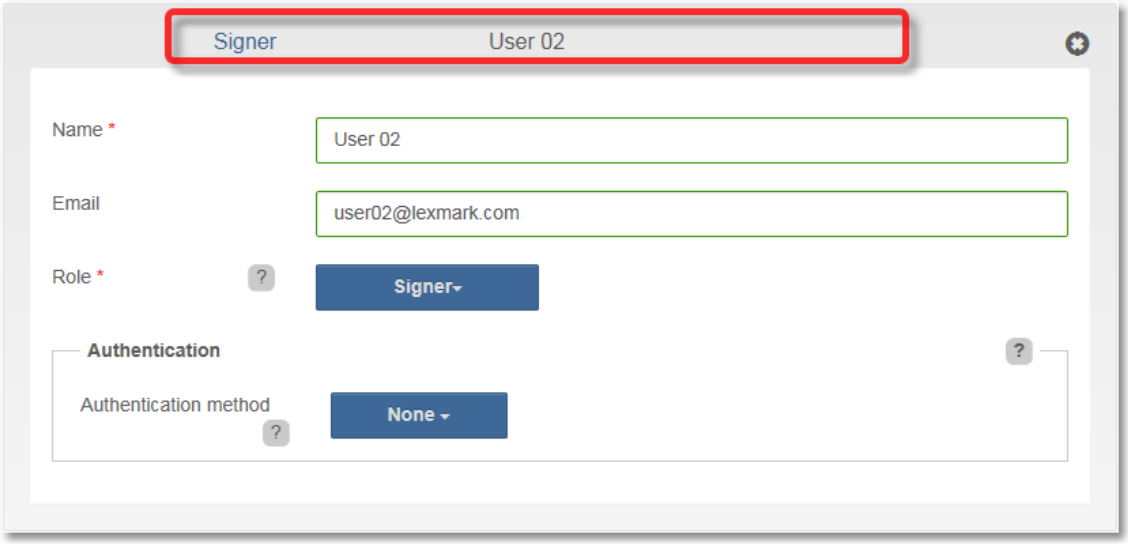
- User input is validated as it is entered.
  Invalid field entry creates an error message

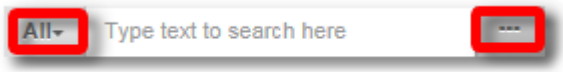


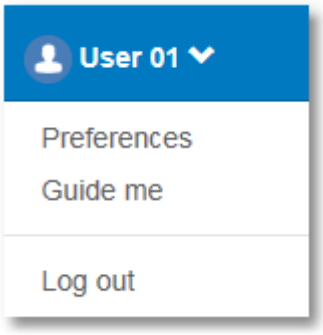
Display or enter additional information

- additional information can be entered or displayed by clicking the gray bars, dots or triangles.

  Here are some samples:

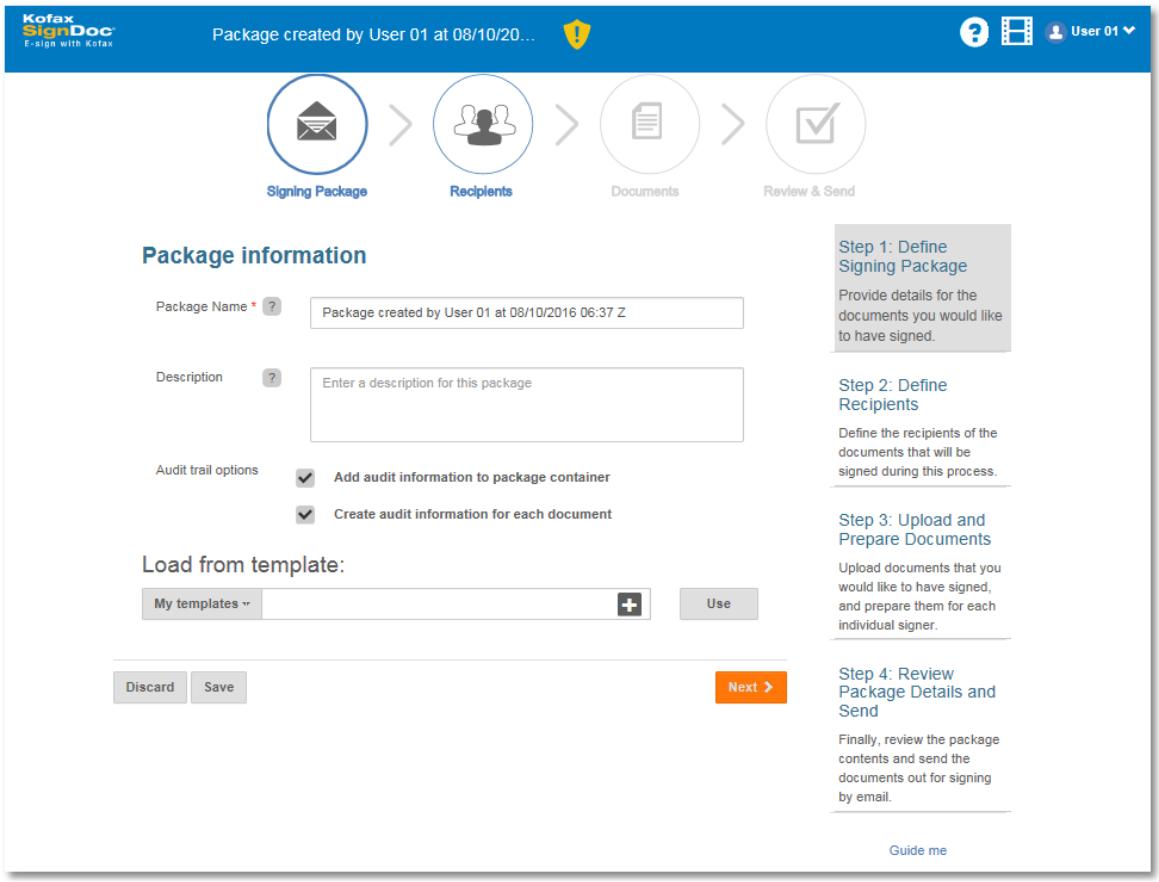






2.3 Supported Languages

The graphical user interface of Kofax SignDoc supports the English language.



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3 Get Started

Get started requires for

- Kofax SignDoc users a login, see Login into Kofax SignDoc
- recipients of Signing Packages, Internet access and a modern browser, see Signing Wizards

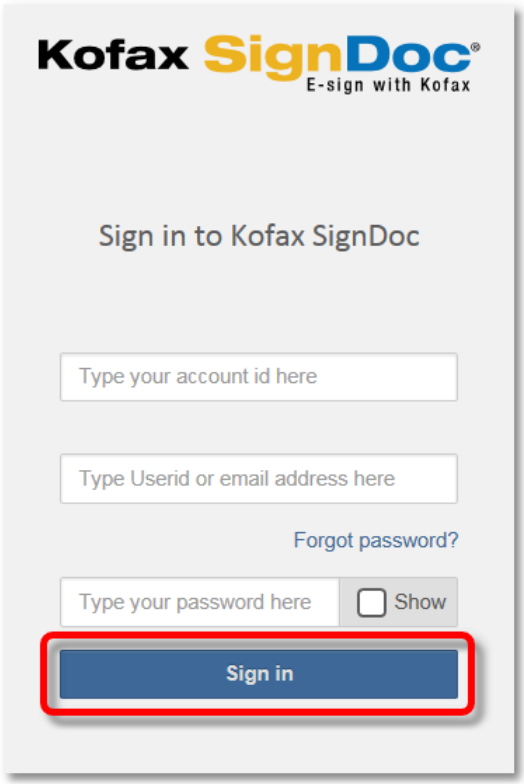
3.1 Login into Kofax SignDoc

Kofax SignDoc users are invited by an account administrator. You receive an email with the request to provide a password. Email address and password are your credentials to log-in.

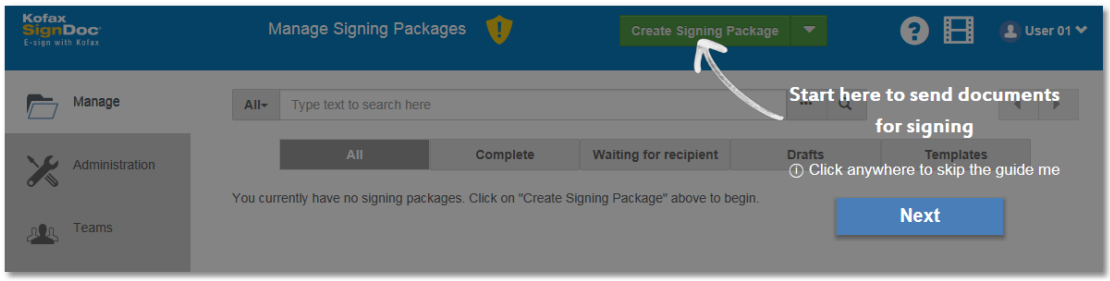
1. Open your Internet browser.
2. Enter the Kofax SignDoc portal page.

3. Click **Login** button.

4. Type your email address and password and click **Sign in**. In some instances, you will also be asked to enter your Account Id. The Account Id will have been provided to you when you purchased Kofax SignDoc and is unique to your (or your company's) account.



When you are logged-in into Kofax SignDoc first time the page **Manage Signing Packages** page is displayed and a **Guide me** is shown. The **Guide me** introduces the main controls on the page. A **Guide me** is available for each page and can be activated by the user every time.



To continue with creating and sending documents for signing and reviewing please see Create and Send Documents.

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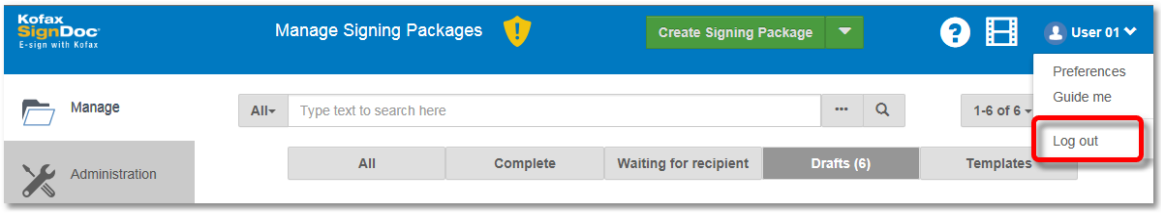
3.2 Log out of the Kofax SignDoc

When you are done in working with Kofax SignDoc it is recommended to log out from the application.

1. To log out, click **Log out**. It returns you to the Kofax SignDoc portal page.



NOTE

Kofax SignDoc is configured to automatically log off inactive users.

4 Create and Send Documents

Kofax SignDoc offers two ways for a user to add recipients and the request for signing or filling fields to documents:

- Guided Creation Wizard (4 step process)
- Use a Template Package (also guided)

With guided **Creation Signing Packages**, the Kofax SignDoc user places fields for signing and filling in the documents manually. The user assigns the fields to a recipient so that the recipient will see only the relevant fields. When the recipients open the document Kofax SignDoc guides the user through all documents and all required actions.

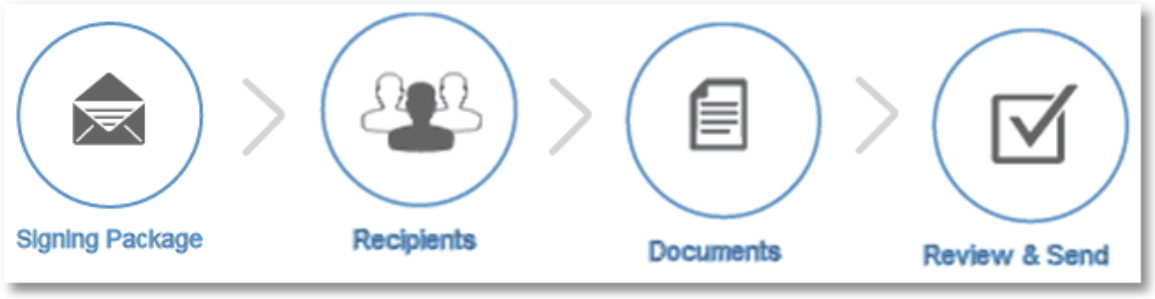
REMARK

With **Use a Template Package** on the Manage Page, the Kofax SignDoc user assigns only recipients to previously used aliases. In this case documents are already prepared with the necessary fields.

A click on the button **Create Signing Package** starts the Wizard. Creating Signing Package is a four step process.

1. Signing Package – Purpose and Explanation
2. Define Recipients / Signers of the signing package
3. Define documents to be included and preparation for signing
4. Check data before send out

The wizard guides the user through process. However the user is not restricted to follow the steps in the recommended order. The Create Signing Package Wizard allows to jump back or forward to enter information.



NOTE 1

If a user clicks on the back button in the browser window running the Create Signing Package wizard the last "save as draft" status will be displayed next time when the user continues with the creation.

- The user continues with creation by selecting button **Continue** related to the signing package on manage page.
- If the signing package hasn't been saved as draft during creation, the user will not be able to continue when hit the browser back button.

NOTE 2

Kofax SignDoc validates entered data.

NOTE 3

Create Signing Package is a wizard where every page shows the elements: navigation bar, navigation controls and information panel

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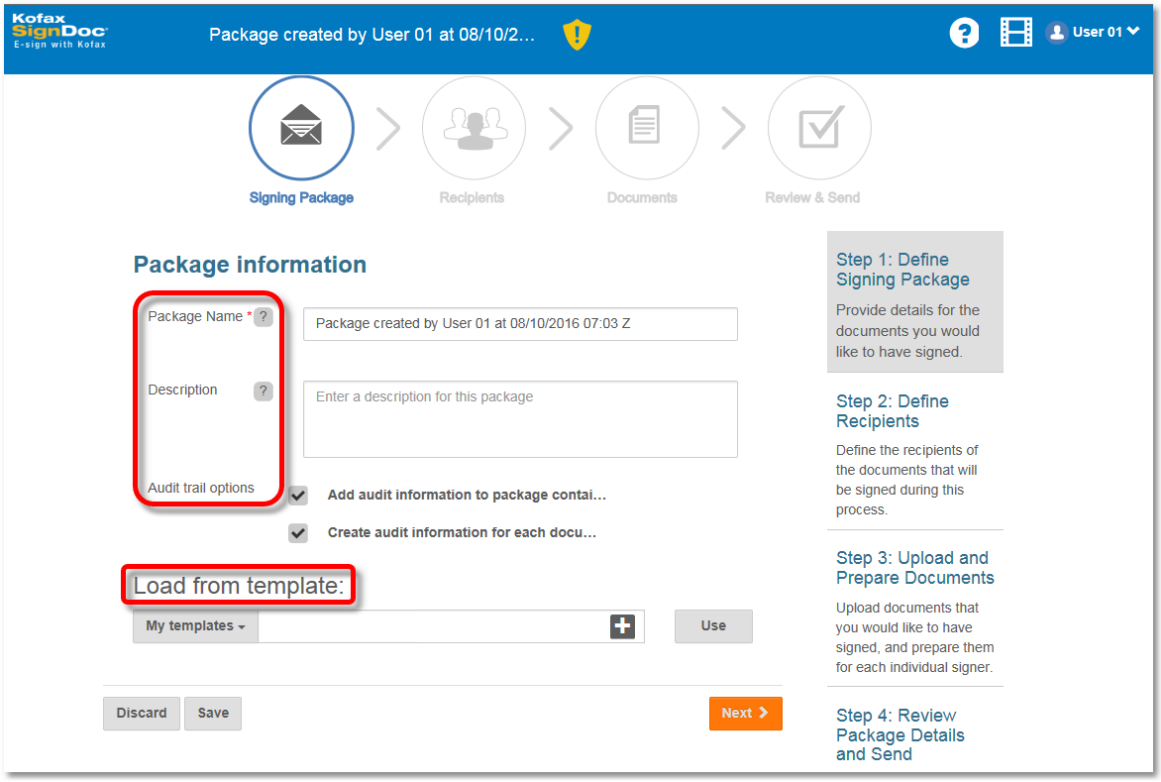
4.1 Create Signing Package

A Kofax SignDoc Signing Package is a container used to send one or more documents for signing or reviewing. A Signing Package can have multiple multipage documents and several recipients with different roles.

1. Click on **Create Signing Package**.

2. Setting up basic information for the signing package or loading a template if desired.



Setting up signing package information:

Package Name: Enter here the name of the Signing Package

Description: Enter here your description for the Signing Package

Audit trail options: By default audit information is added to package container and created for each document

If you load a signing package from Template Package

Load from template: Enter here the name of a pre-existing Template Package (a drop down list displays all available templates).

NOTE 1

Selecting the template prefills the wizard in the consecutive steps with template information.

NOTE 2

Soft prompt shown "[Template Name] is loaded".

3. Click the **Next** button to continue.

4.2 Add Recipients to Signing Package

In the **Add Recipient(s)** page a Kofax SignDoc user

- adds recipients name and email address
- specifies identification methods
- defines the routing order

NOTE

In case the signer will participate in an in-person signing session the field **Email** for entering the recipient's email address does not have to be filled out.

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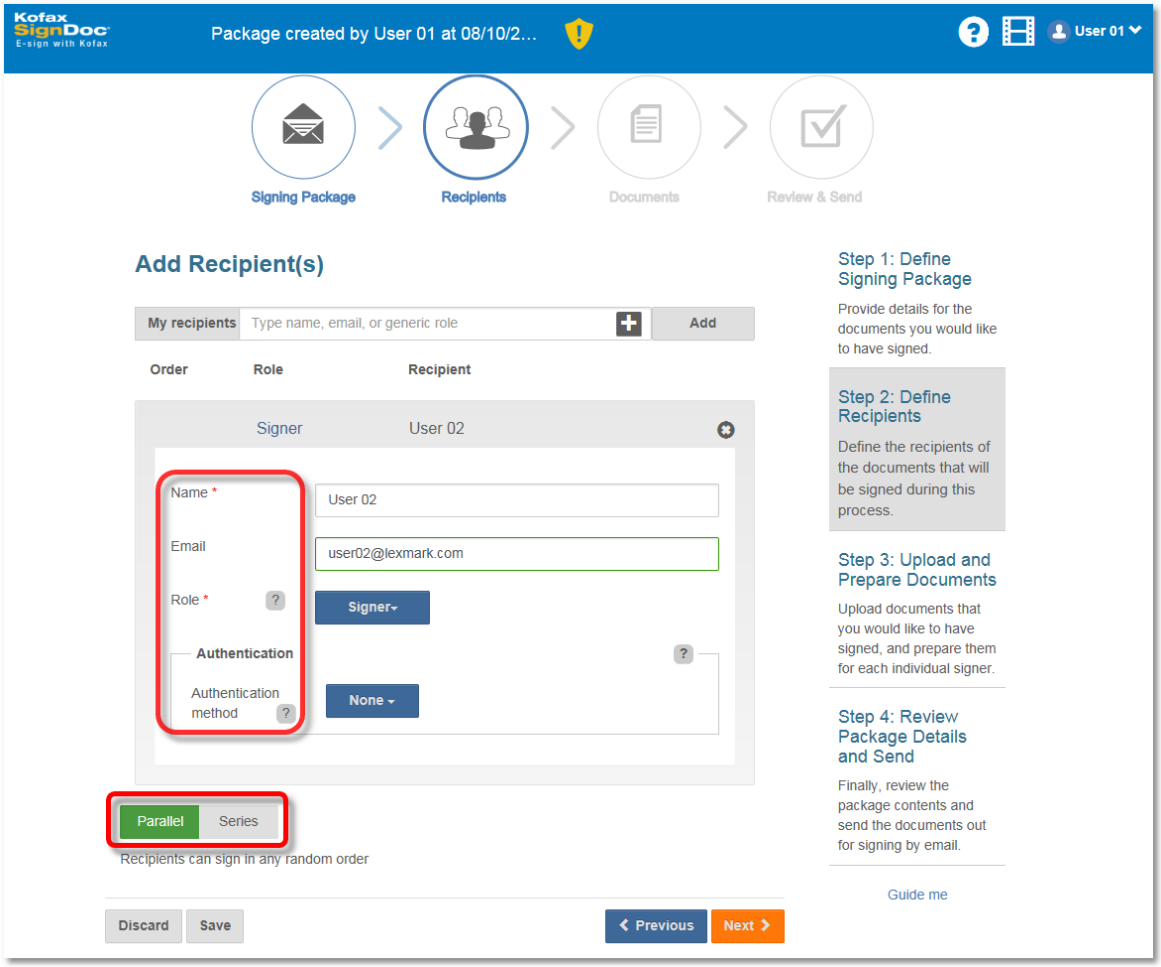


Add recipients name

The user enters name or email in the appropriate field and hits enter to add contact to list or select the plus sign. If the recipient is stored in the contact list Kofax SignDoc fills automatically email address and recipient name.

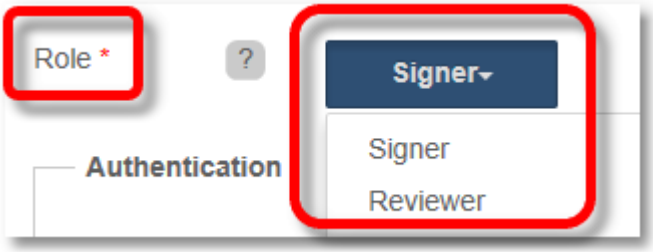
- Selecting a known contact
  Typing text into the field creates a drop down populated with contact(s) that match entered text. Selecting the contact from the drop down can be done by clicking the arrow key + enter. Selected contact is added to the recipient list.
- Not selecting a known contact
  "Inputting text + enter" directly in the text field adds a new recipient, depending on the format the text will be interpreted as either name or email address. Adding a recipient in this manner adds the recipient item expanded with the email or name (depending which is empty) highlighted, cursor automatically placed in the corresponding incomplete field.

Delete recipient

A recipient can be deleted from the list. Clicking the delete button will show a warning informing if the user that the signer has already assigned signature field(s). Continuing will remove the signature fields from the document(s) in the signing package.

Role

After adding a recipient the Kofax SignDoc user can select the role for the recipient (Reviewer or Signer), but the reviewer will not be allowed to fill any editable fields.



A recipient may act as signer or as reviewer

- Signer
  Recipients with the role signer are requested to fill editable fields - especially to sign signature fields, to enter data in text fields or to select check boxes - in the documents grouped to the signing package.
- Reviewer
  Reviewer with the role reviewer receive the signing package for information. The person will only open the documents of a signing package for reading (including all entries done by users with role).

Signer certificate required

When **Signer certificate required** is selected a signer certificate is necessary. A client certificate can only be used with the Internet Explorer, Chrome and Firefox browsers on Windows operating system. The SignDoc Device Support setup and the appropriate Browser Extension or Add-On must be installed on the client computer.

For capturing handwritten signatures using SignPads you need to:

1. Install SignDoc Device Support.

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The SignDoc Device Support setup is part of the SignDoc shipment or can be downloaded from the Kofax Services page:
https://services.kofax.com/support/products/signdoc/2.0/device-support.php

2. Extend your Browser with according add-on or extension for the DeviceConnector.

   For the following browsers download and install additionally:

   - Firefox Add-on URL:
     https://services.kofax.com/support/files/products-files/device-drivers/signdoc/signdoc-deviceconnector-1.0.0.xpi
   - Chrome Extension from Chrome Web Store
     or use URL: https://chrome.google.com/webstore/detail/signdoc-deviceconnector/mjmgfgodldapcfepblcemihhdenlnimk
   - Internet Explorer Add-on
     Add-on is installed with SignDoc Device Setup.

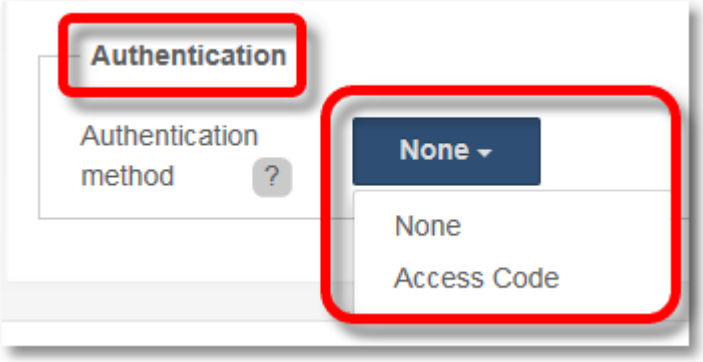
     NOTE

     The support webpage mentioned in step 1 will also guide you to the appropriate Browser Extension or Add-on.

When **Signer certificate required** is not selected the installed certificate is used (see Signing Certificate).

Authentication

The Kofax SignDoc user may request that recipients must authenticate before opening the Signing Package. The authentication section allows to identify a recipient. This option is to limit access to the Signing Package to authorized persons only.

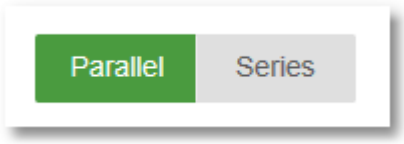


Authentication methods:

- **None** (default): authentication is based only on email address
- **Access Code**: additional authentication code is delivered to the recipient using another channel. Text field prefilled with random characters and numbers (individual changeable).
  The authorization code cannot be changed after a signing package is sent.
- **SMS Authentication**: only available if configured for your account. The SMS Authentication delivery channel option requires the recipient's phone number. Kofax SignDoc will send an SMS with the access code to the phone number when the signing session is started. The recipient must enter this access code to open the signing package.

Routing order

The routing order sets the order in which recipients receive and can work on the document(s). The routing order of the recipient can be determined if desired:



- **Parallel** signing (default)
  To all recipients invitations are sent at the same time (send date).
  All recipient will show order number 1.
- **Series** signing
  Each recipient is invited (via email) in sequential order. The next recipient is invited only after the previous recipient 'completes' his/her part.
  Depending on the order for each recipient an order number is displayed.
  A message appears alerting the user to arrange the signers in the desired order by dragging the recipient item in the appropriate order. Dropping the recipient updates the order number.

Define routing order if in series using toggle button (parallel/series) to do this. This option is available only if the Signing Package has at least two signers defined otherwise it is disabled.

4.3 Document(s)

In the **Add Document(s)** page a user adds documents from local storage or online documents. The user can upload one or more documents either by file upload or by drag & drop.

The Document(s) page is for

- uploading documents
- autoprepare documents
- adding document description
- start document preparation

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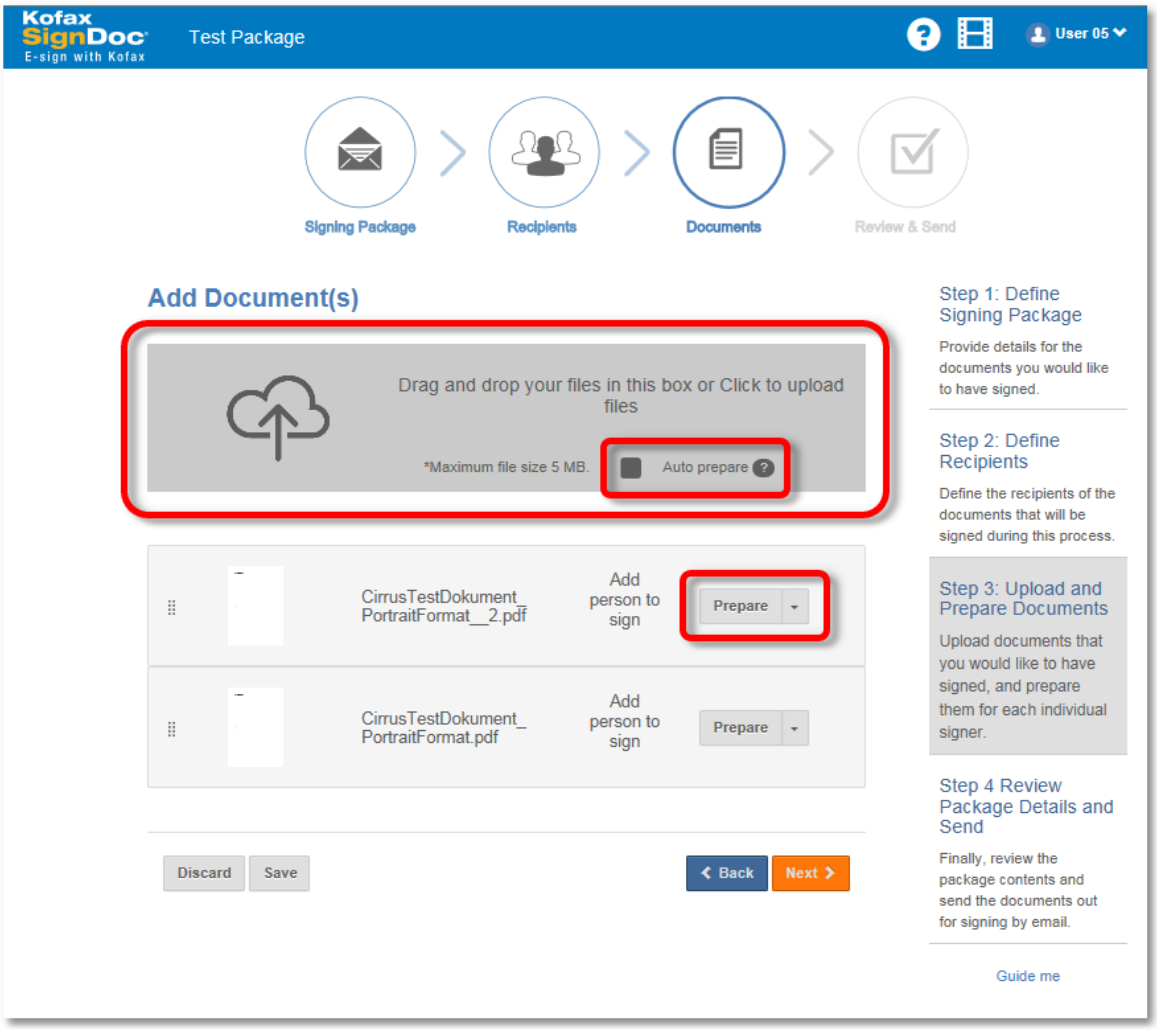
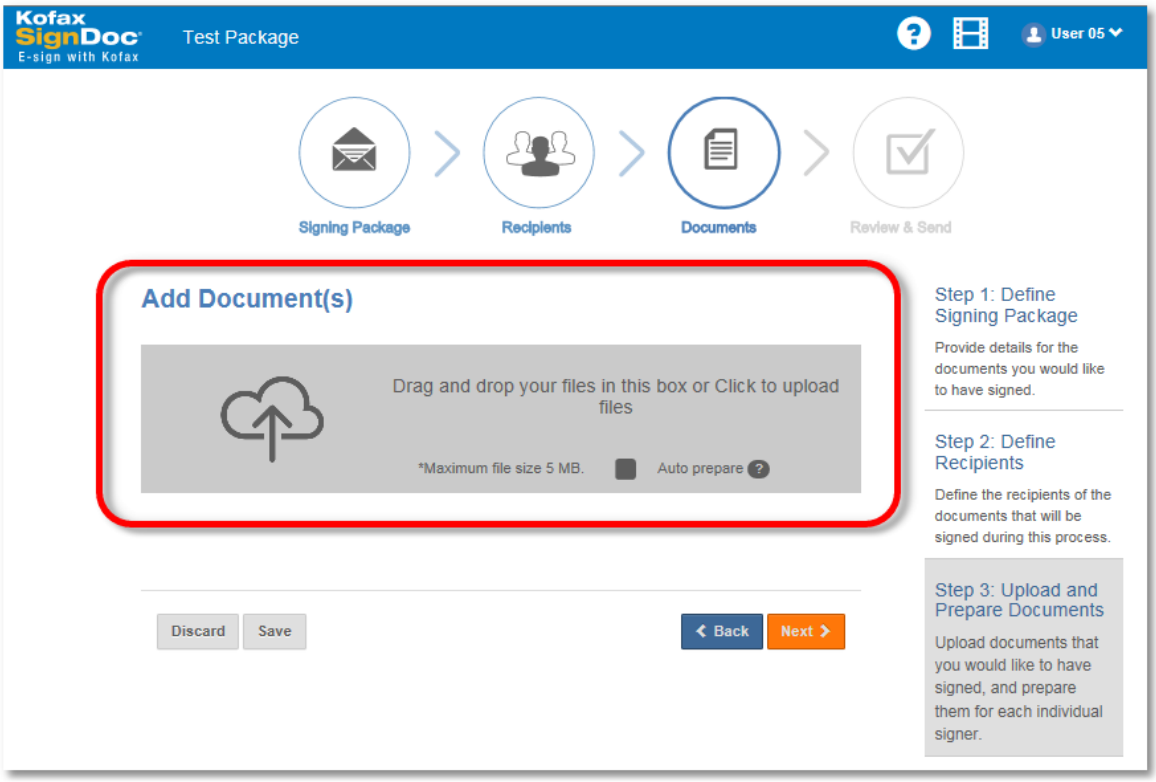


Upload document(s)

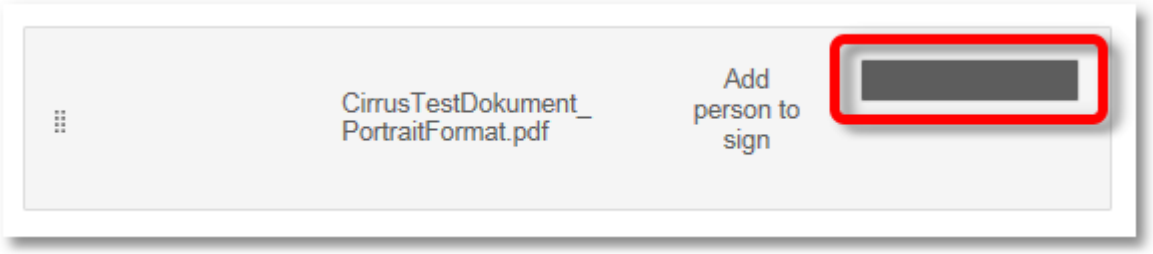
For each uploaded document a description can be added to inform the recipient about expectations or document content.

- After files are selected for upload (either ‘drag and drop’ or the ‘file picker’) new document items are added to the bottom of the list.
  - To upload documents click into the grey box and pick a PDF file with the file chooser dialogue
  - Drag & Drop a PDF file into the grey box area

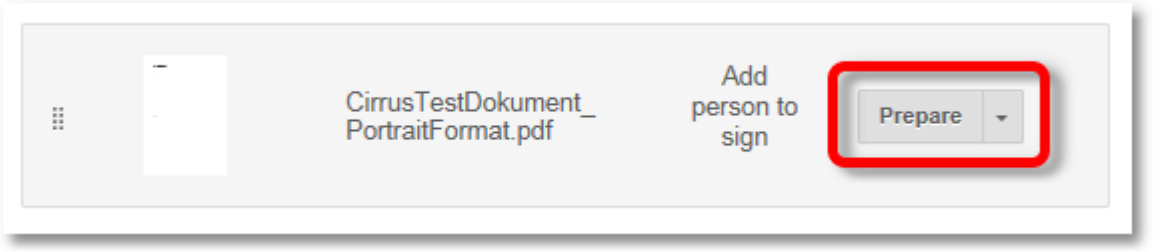


Upload Behavior

- A progress bar indicating upload progress is displayed



- Upload progress bar is replaced with **Prepare** button when upload is completed



Document

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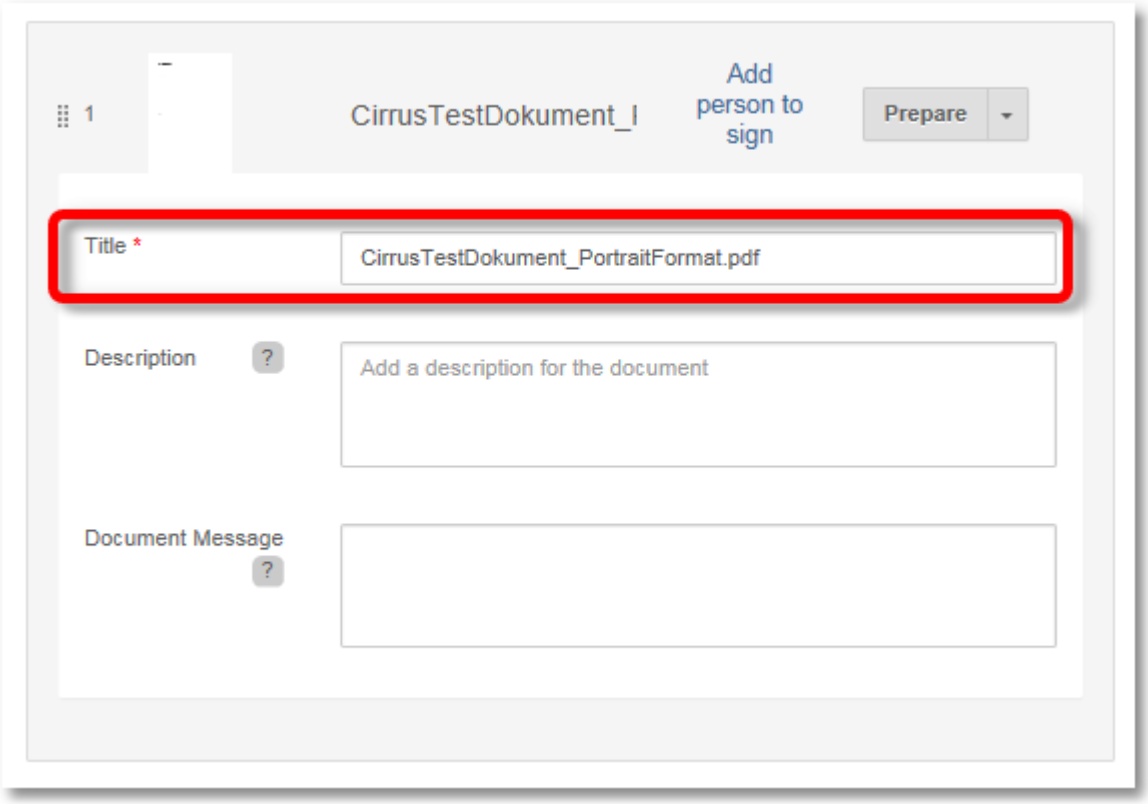
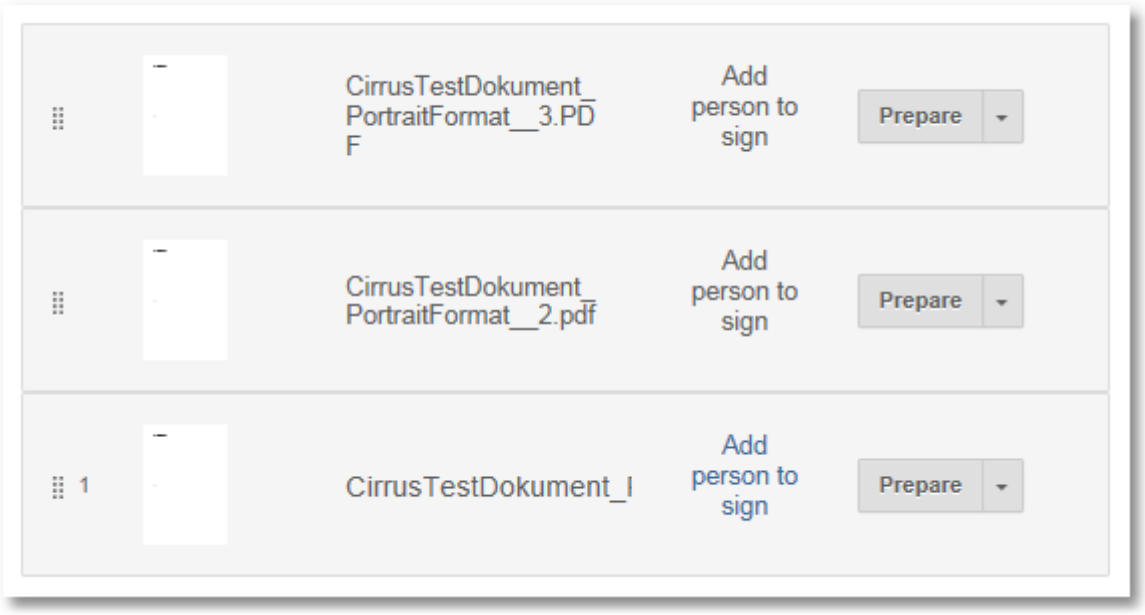
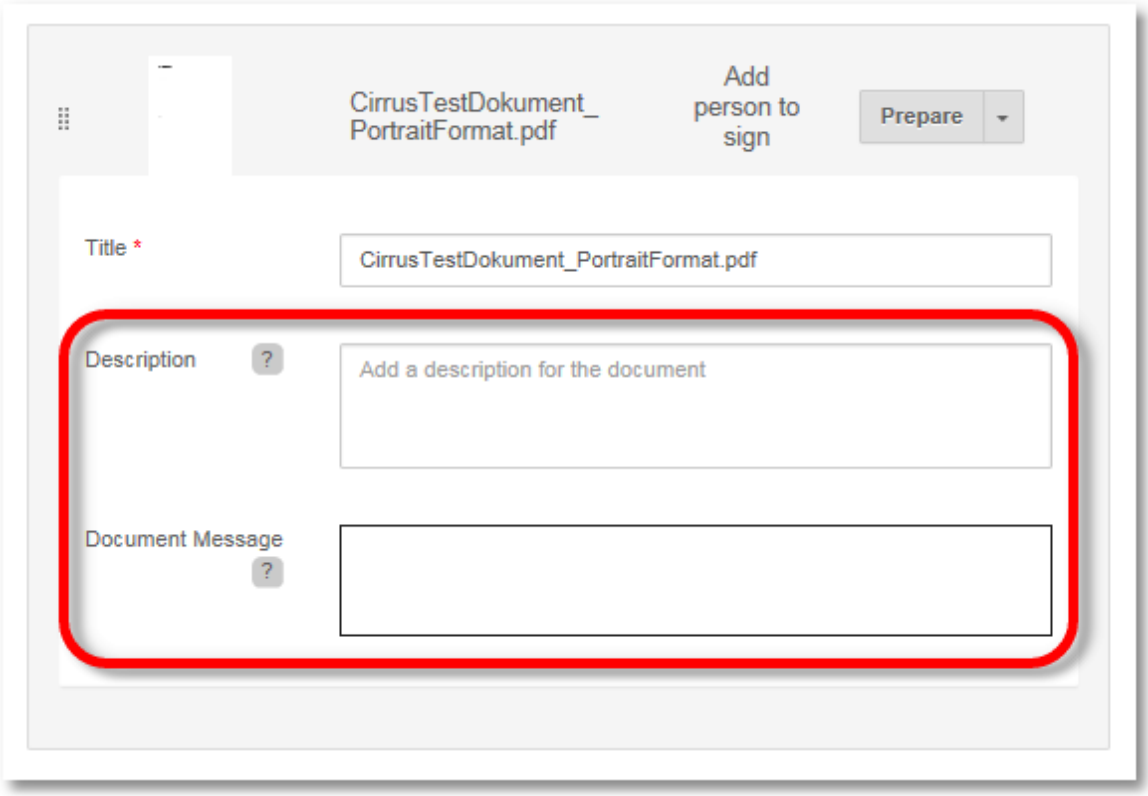
- Document name field is prefilled with the file name.
  A Kofax SignDoc user can change the name by clicking in the document name field and typing a new name.



- All uploaded documents are listed in upload order.
  User can arrange the documents in the desired order by dragging the document item in the appropriate order. Moving the document item is constrained to the document item list area. Order labels are updated with the item is dropped.



- For each document a description and a message can be added. Click either on the triangle or below the document name.



- To remove a document, click the **Delete** button.

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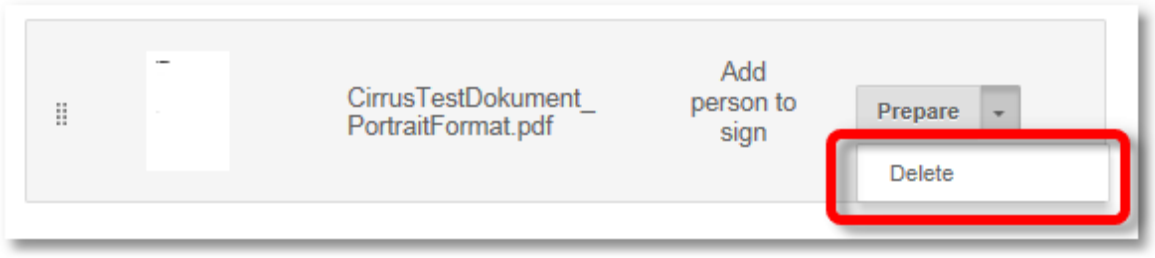
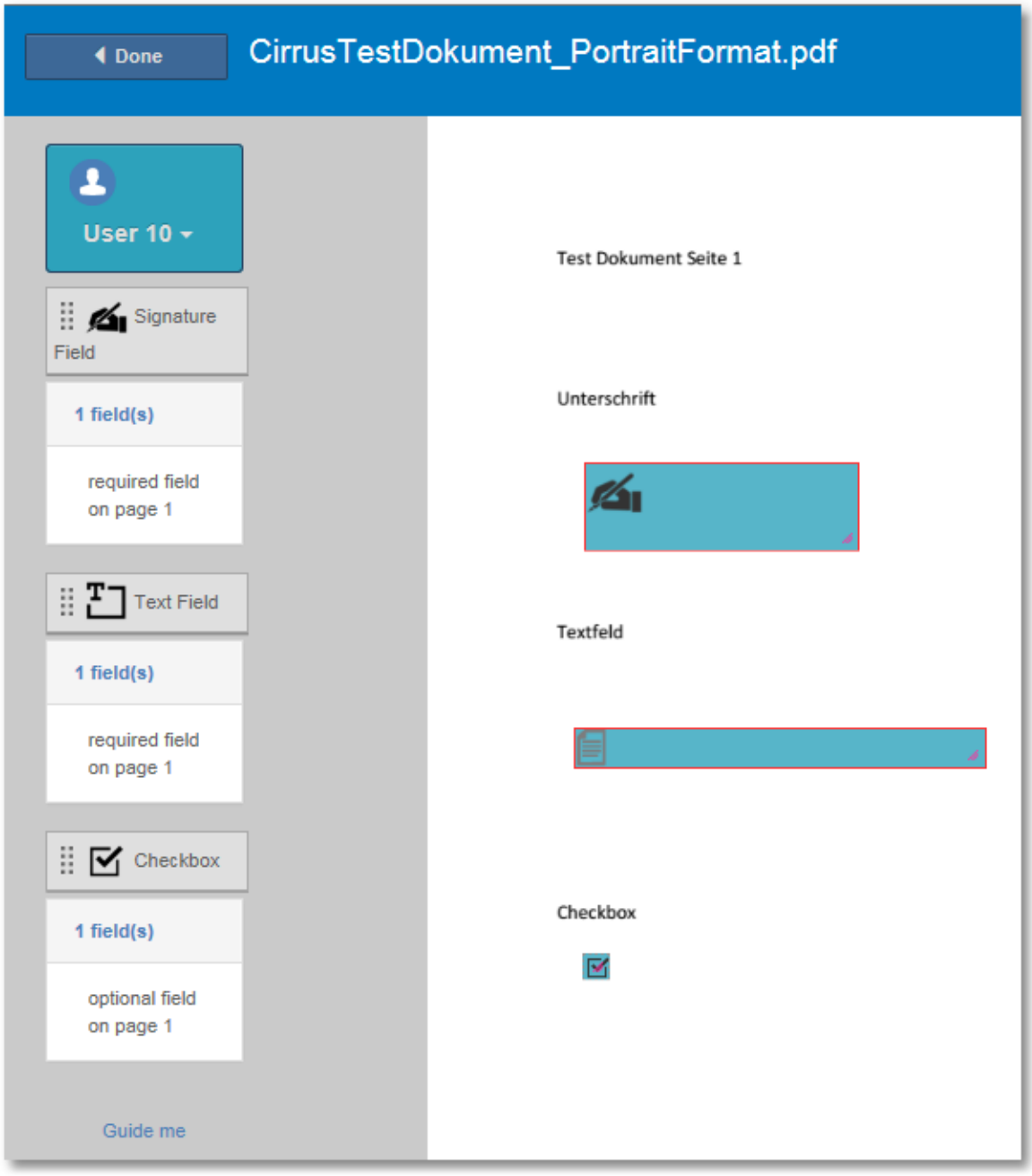


Prepare document

You can view the PDF document by clicking on the document icon or on **Prepare** button. The click opens the document prepare editor.



Autoprepare a document

The user can decide if Kofax SignDoc shall prepare the uploaded document(s) with one signature field at the end of each page for each recipient.

- Auto prepare flag is set when uploading the document.
  If the flag set document is 'autoprepared' with one mandatory signature field for each recipient with the role signer when upload is completed.
  - Signature fields are placed on the first document page and can be moved to other pages.

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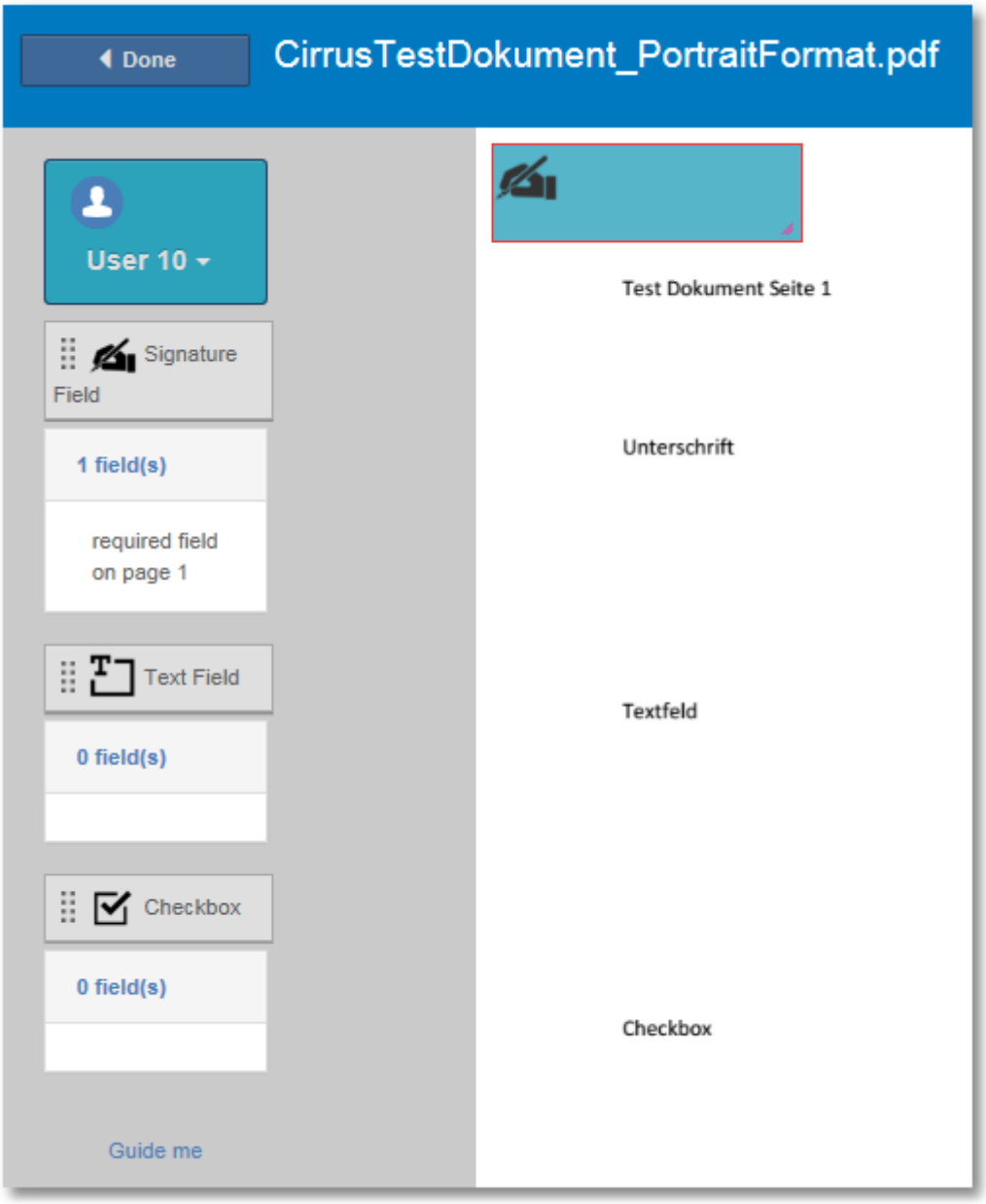

NOTE

If you are uploading a PDF document with form fields Kofax SignDoc detects the fields and keep them (no conversion to a proprietary fields).

Next button

The **Next** button will guide the Kofax SignDoc user to the **Review and Send** page.

4.3.1 Handling Word Documents

Kofax SignDoc supports uploading MS Word documents for signing.

It supports both Office 2007 (.docx) and Office 2003 and earlier (.doc) formats.

These Word documents are automatically converted to Portable Document Format (PDF). The PDF file format is more appropriate for digital signatures and archiving.

Microsoft Word Signature Lines

The MS Office signature lines are recognized by Kofax SignDoc and are automatically converted to PDF signature fields.

Microsoft Word Signature Setup

Kofax SignDoc will evaluate the "Suggested signer" and "Suggested email" when trying to assign the PDF signature fields to a recipient.

If the signature line "Suggested signer" is not empty and the signature line "Suggested email" is not empty Kofax SignDoc will look for a match from in the list of existing recipients. If only one recipient with the same name is found the signature field will be assigned to this recipient. If there are more than one recipients with such a name, the recipient with the same email will be used.

If there are more than one recipients with the same name and email, the recipient with assigned signature fields will be used.

If the signature line "Suggested signer" if not empty and the signature line "Suggested email" is empty, Kofax SignDoc will look for a match from the list of existing recipients. If only one recipient with the same name is found the signature field will be assigned to this recipient. If there are more than one recipients with the same name, the recipient with assigned signature fields will be used.

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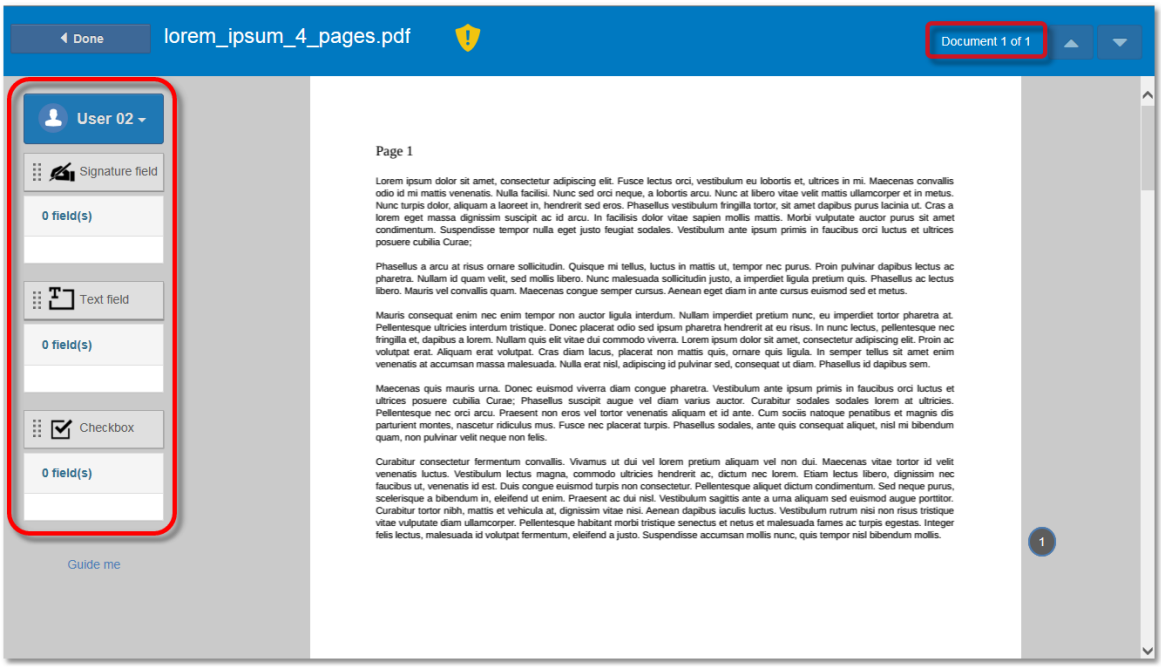
If the signature line "Suggested signer" is empty and the signature line "Suggested email" if not empty Kofax SignDoc will look for a match from in the list of existing recipients. If there are more than one recipients with the same email, the recipient with assigned signature fields will be used.

If there is no recipient that matches either the name or email a new recipient will be added to the package, using the "Suggested signer" and "Suggested email" from the signature line. If more than one signature line has the same "Suggested signer" and "Suggested email" these signature fields will all be assigned to the same recipient.

4.4 Prepare Document(s)

A Kofax SignDoc user can make changes to the uploaded document. The content of the selected document is shown on this page. The standard browser zooming methods are supported. The user can browse through the current documents of the package in both directions (forward, backward).

Kofax SignDoc displays the current document list number of the selected document and the number of all documents in the signing package. If the first document is shown, the user will not be able to select a previous document and vice versa.



The Kofax SignDoc document editor informs about selected document (title, description, messages) and supports placement

- signature fields
- text fields
- check boxes

NOTE

Adding fields can only be done for recipients with role signer.

Field Assignment

To assign a field to a signer select the recipient name in the interactive field tool. Click and drag the field from the palette and drop it on the document.

A field is assigned either to a specific recipient or all recipients (any user) and can be

- resized (sizing by dragging the lower right corner)
- moved from page to page by scrolling
- deleted via the properties dialog
- specified as required (mandatory field)

Field Properties

When a field from the interactive **Field** panel is inserted in the document the Kofax SignDoc user can set properties for this field.

Basic properties for all field types are:

- associated name of assigned recipient
- field name - identifier and label for the field
- decision if a field is defined as required or not

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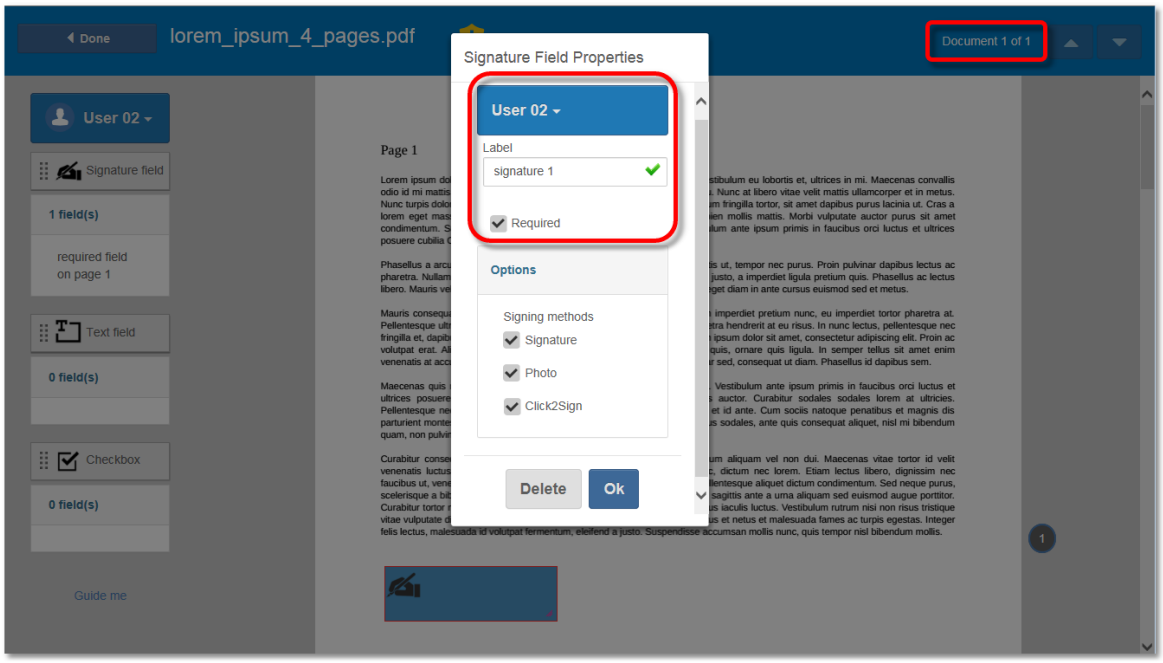


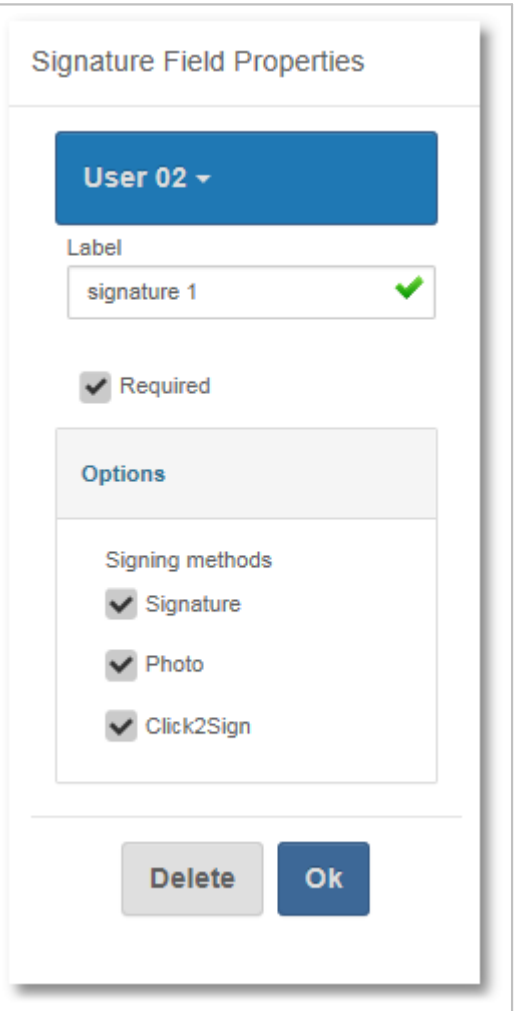
Signature field options

Following signing methods are selectable additionally to the basic properties

- handwritten signature
- click-to-sign signatures
- take a photo

A Kofax SignDoc user can limit the available methods or leave it to the recipient to select.

Default signature fields are marked as required and allow all supported signing methods.



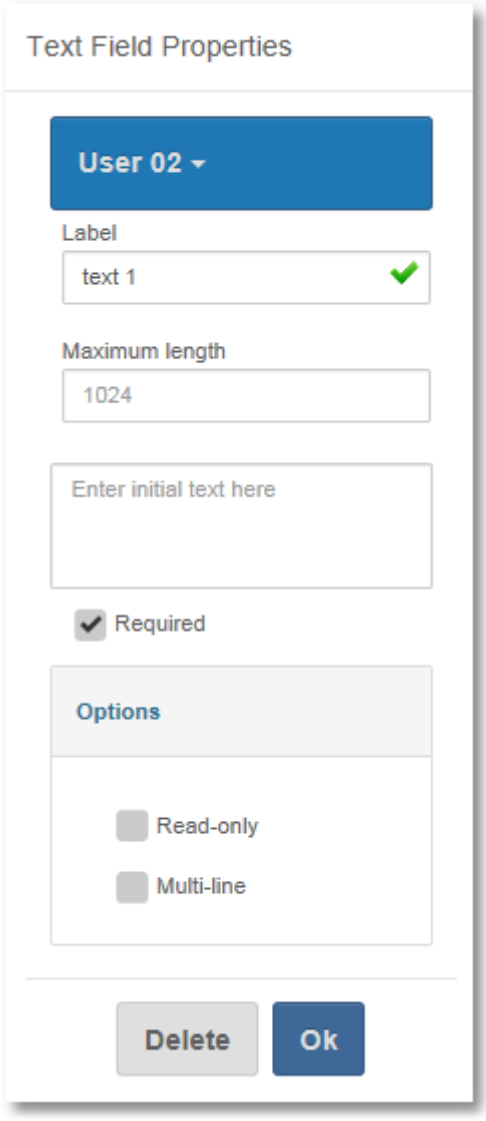
Text field options

Text fields accept user input, which can be alphabetic characters, numbers, or both.

Default text fields are single line text fields and marked as required.

Following options can be set additionally to the basic properties.

- text field for typing information to the recipient(s)
- decision if a field is defined as read only or not
- placing a multi-line text field or not



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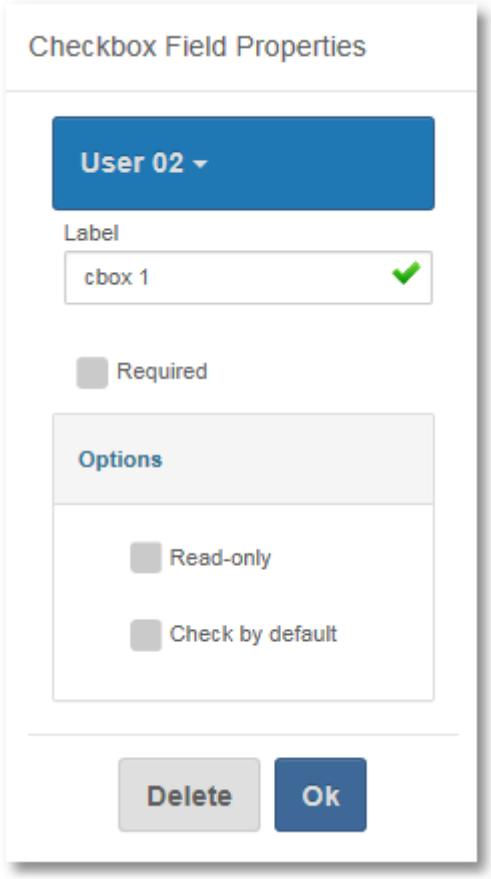
Check box options • set the check box to Read Only	

Field Controls

The field properties dialog includes two controls:

- **Delete** button: to remove a field
- **OK** button: to accept changes

Continue with other documents

The document count indicator in the page header shows the number of documents within the signing package. The previous button next to the count indicator links to previous document. The previous button is disabled if the first document is displayed. Next document button takes user to the next document in the list. It is disabled if the last document is shown.

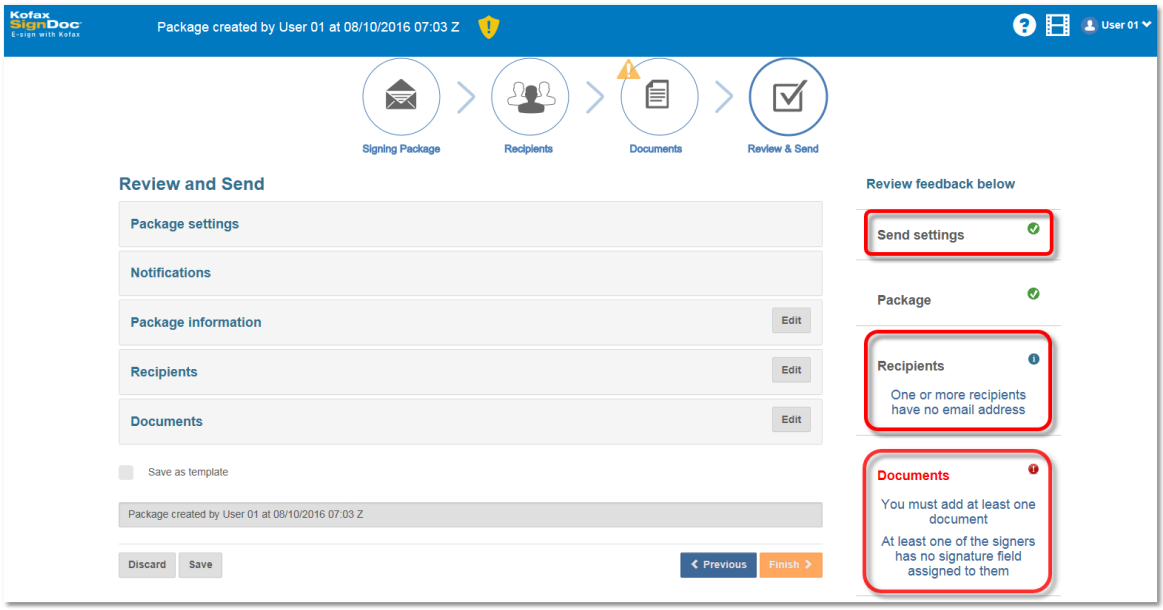
Done Button

The **Done** button in the page header will guide the Kofax SignDoc user to the **Document(s)** page back.

4.5 Review and Send

The **Review and Send** page is the final step in the Create Signing Package wizard. The page provides an overview of assigned recipients and content of the package. It validates available information corresponding to the steps used to create the Signing Package. The validation result provides a quick overview of acceptance, errors and information of the current signing package.

- If there are no errors a green tick provides positive confirmation when a section is fine.
- If there is a validation error in a section, text is shown in red



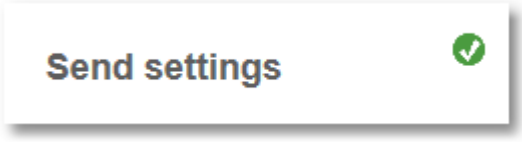
The **Review and Send** page is divided into following sections

- Validation box
- Signing Package send settings
- Package information
- Recipients information
- Documents information
- Save as Template Package option

Validation box

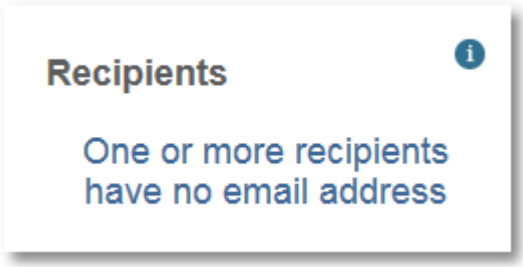
The validation table provides a quick overview of acceptance, errors and information of the current package.

- If there are no errors in the section a green tick provides positive confirmation when a section is fine.

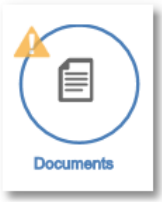


- If there is a validation error in a section, text is shown.

In the Review and Send page of the signing wizard an informational message appears if there is a recipient without an email address.



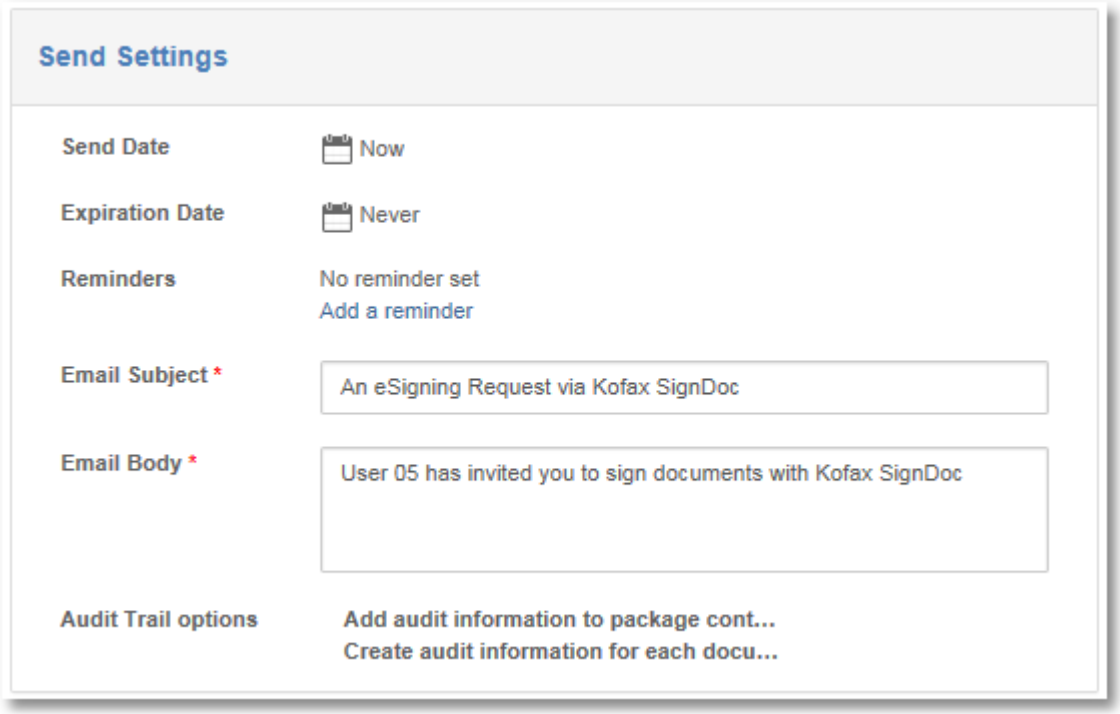
- Each section shows a list of error or information messages. The text links to the section and input field the message relates to:
  - Error:
    explanation of the error, text shown in red
  - Information warning:



If the validation is successful the user is able to send the signing package to the recipients. The user selects the **Send** button. After sending the signing package the user is redirected to the manage page. The user is informed via a soft prompt that the package is sent.

Signing Package Send Settings

This section shows when will the package be sent with which information.



Setting	Description
Send Date	A Kofax SignDoc user can define when the email is sent to recipient(s).
Expiration Date	A Kofax SignDoc user can define if the availability of a Signing Package is limited or not (default: never).
Reminders	A Kofax SignDoc user can define when reminder emails are sent to recipients (after sent or before expiry day).
Email settings	A Kofax SignDoc user can customize the text for the email subject and messages for the recipients in the email body. Email subject and email body text are prefilled with default text.
Audit trail	A Kofax SignDoc user can specify if a container PDF document with audit trail information for the package and for each document is sent to the recipients after completion of Signing Package.

Start and expiration date of a signing package and start date of a reminder are now shown with a time (hh:mm) part.

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For a newly created package the time part of the dates should always show as 00:00 for midnight in the creator time zone.

Changing the time zone will not affect the dates of existing packages as long as they keep unchanged.

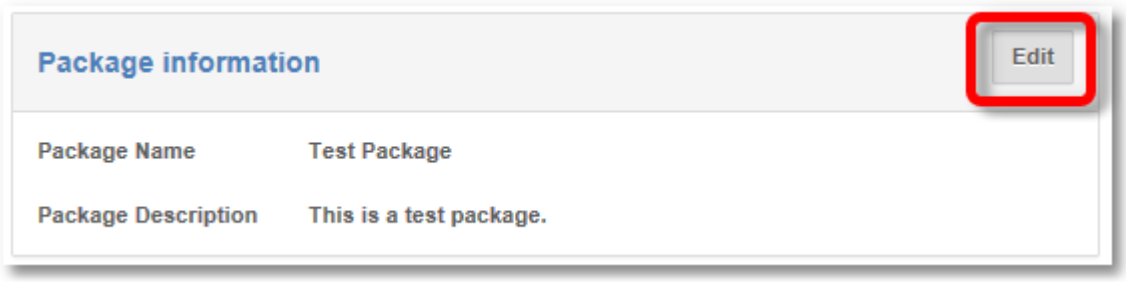
Changing one of these dates will recalculate all the dates with the active time zone.

NOTE

It is recommended not to uncheck the check boxes.

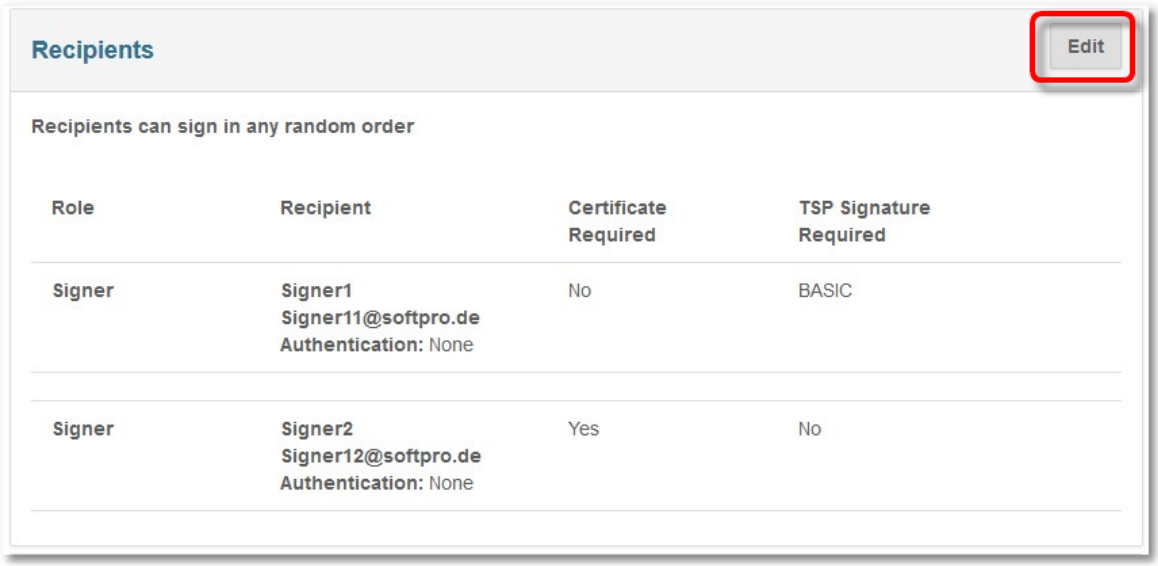
Package information

This section displays the entered information for the package from Create Signing Package start page as read only text. A Kofax SignDoc user can change the text by clicking the **Edit** button.



Recipients information

This section displays the entered information for recipient from Add Recipients to Signing Package page as read only text. A Kofax SignDoc user can change the data by clicking the **Edit** button.

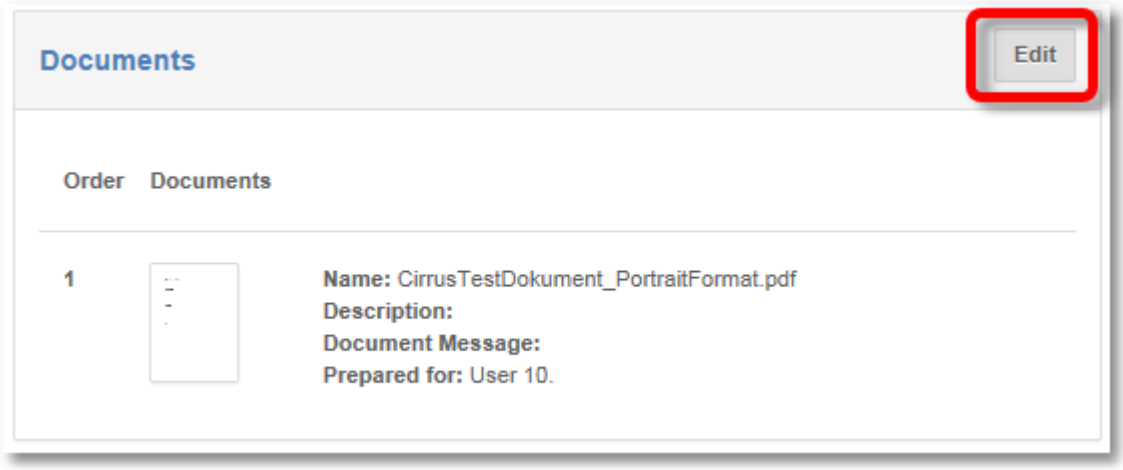


- If a recipient is removed from the recipient list, in this case all assigned fields are removed from document(s).

- If a recipient with role signer is added to the recipient list, in this case an error message appears on the Document(s) page that the new signer needs to be assigned to a signature field.

Documents information

This section displays the entered information (document name, description, messages and status information) for uploaded documents from Document(s) page as read only text. A Kofax SignDoc user can change document information or availability of documents by clicking the **Edit** button.



Save as Template Package option

When opening the section Readonly/Writeable a Kofax SignDoc user can decide to save the created Signing Package as Template Package when selecting the check box **Save as template**. The prefilled name of the Template Package can be changed.

The template is only saved when you select finish. It is not saved in case you select the **Save** button.

The check box **Save as template** is only active if the package is complete.

5 Sign and Review Documents

This section is about how recipients of prepared documents will use Kofax SignDoc service to sign or review the documents.

- If the signer receives an email notification from the sender on behalf of Kofax SignDoc he can sign in a straight forward 4 step remote signing session:

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1. Authentication of the recipient
2. Agree with the E-sign Consent
3. Review and Sign documents
4. Finish the signing procedure

- The signer can also use the in-person signing session, which enables the signing of documents without the need to send an email to the recipient:

1. Welcome
2. In-person signing
3. Finish

NOTES

A recipient is not requested to login into Kofax SignDoc. The recipient or the signing host in case of in-person signing needs access to Internet and his or her email application.

The recipient can decline the process every time.

5.1 When Can a Package be Signed?

In general a template or draft are not directly signable.

A package must contain at least one signer, and there must be at least one document with a signature field for a signer. Go through the **Guided Creation Wizard** and click the **Finish** button on the **Review and Send** page to prepare it for signing.

If an email address has been included the signer will be notified via email and a link to open a browser to start signing is included in the email. There are a number of options for how and when this notification is sent:

- See **Review and Send > Send Date**
- See **Add Recipients to Signing Package > "series" signing**
- See **Resend a Signing Request**

REMARKS

If the package has been **Declined**, **Voided**, **Completed**, **Archived** or if it has **Expired** it can no longer be signed by any persons.

It is possible that a package is edited so that it is no longer signable, for example a document is deleted. If this occurs, the package goes back into draft state.

There are two channels how signing can be started.

1. Remote Signing
2. In-person Signing

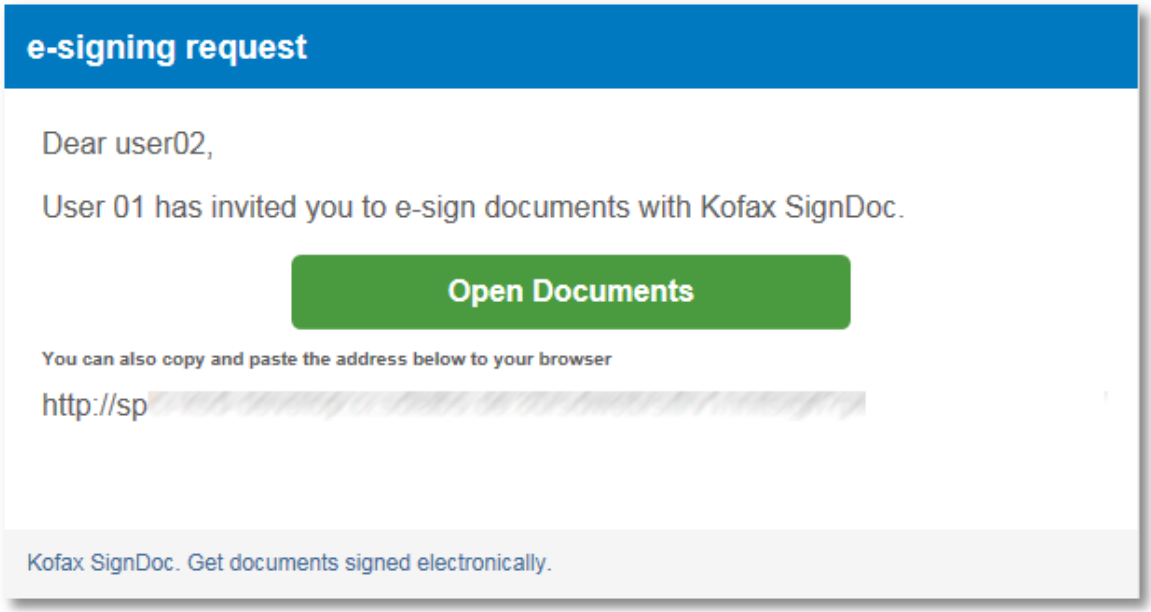
5.2 Remote Signing Session

Receive Signing Request

Recipients first experience with Kofax SignDoc is an **email** informing them about the request that documents need their review or signatures.

The email is sent from Kofax SignDoc on behalf of the sender (the user organization). The email contains:

- information about the sender (sender name)
- a message from the sender in the email body
  - to inform who invites whom and for what
  - and a secure personalized link to Kofax SignDoc to open the document.



Welcome Page for the Remote Signing Session

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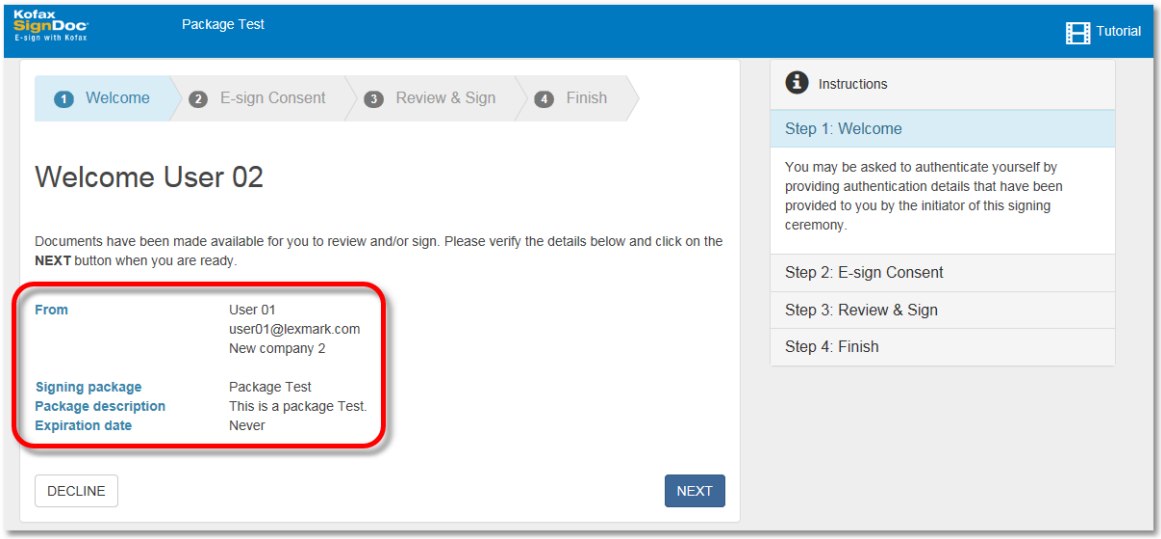
When the recipient clicks on the link or the button **Open Documents** the Kofax SignDoc guided signing and review process starts. This page informs the recipients about:

- who requested reviewing or signing
- what is requested to review and sign
- expiration date
- request from sender for recipients authentication



Authentication Option

If defined by the sender the recipient must be authenticated before the next page with the E-sign Consent form will be displayed.

Kofax SignDoc offers authentication based on access code. The recipient will enter the code in the field next to **Access code**.

If authentication fails a message is shown.

The next step requires the signer to Agree with Electronic Signing.

The package creator may have used Kofax SignDoc to automatically send the SMS containing the access code to the recipient. This SMS is only sent when the signing session is started.

5.3 In-person Signing Session

There are typically two scenarios when in-person signing might make sense for you.

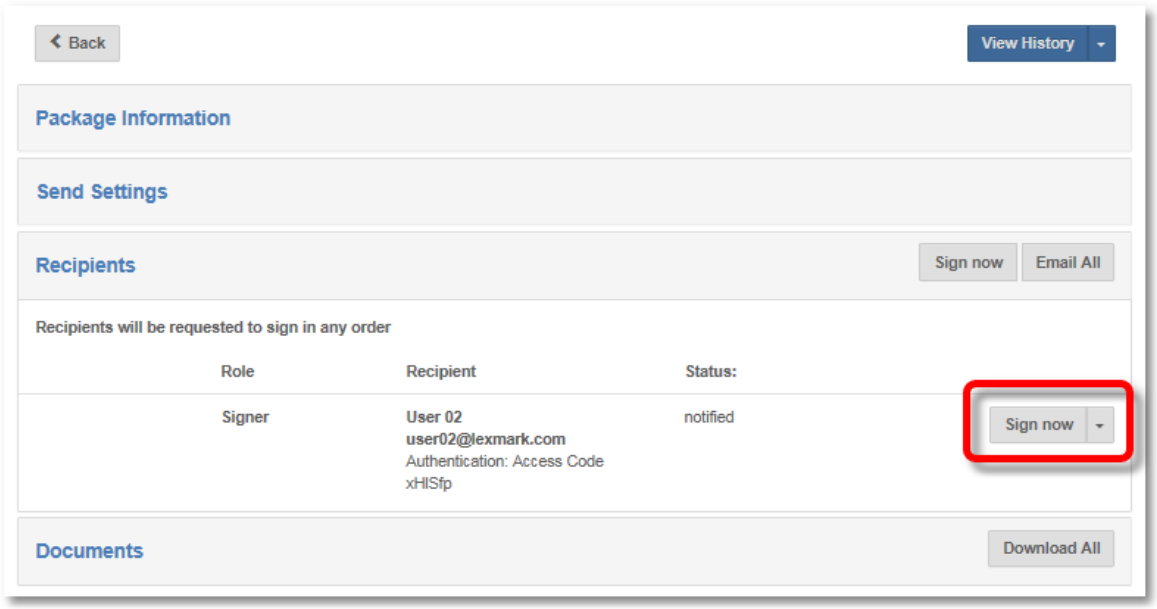
- When the signer are physically present and would like to e-sign the documents immediately without the need to open an email
- Sending an email invitation to the signer is not possible. For example the signer does not have an email address, computer, or an internet connection.

In-person signing allows one or more persons to review and/or sign the documents with the assistance of the signing host (the account holder). The participants of the signing session need to be physically present. As the signing host you will facilitate but not necessarily participate in the signing session. The signing host will oversee that control of the signing device is passed on to the active signer.

There are no additional prerequisites when preparing a package for in-person signing.

An in-person signing session can be started for a valid package for one or more signers that have not finished signing. You can launch the in-person signing process in the following ways:

1. Initiate the process by pressing the **Sign now** button.



2. Click the **Start** button to open the in-person signing session in a new tab.
3. You can open the common signing session on your mobile device using the QR code.

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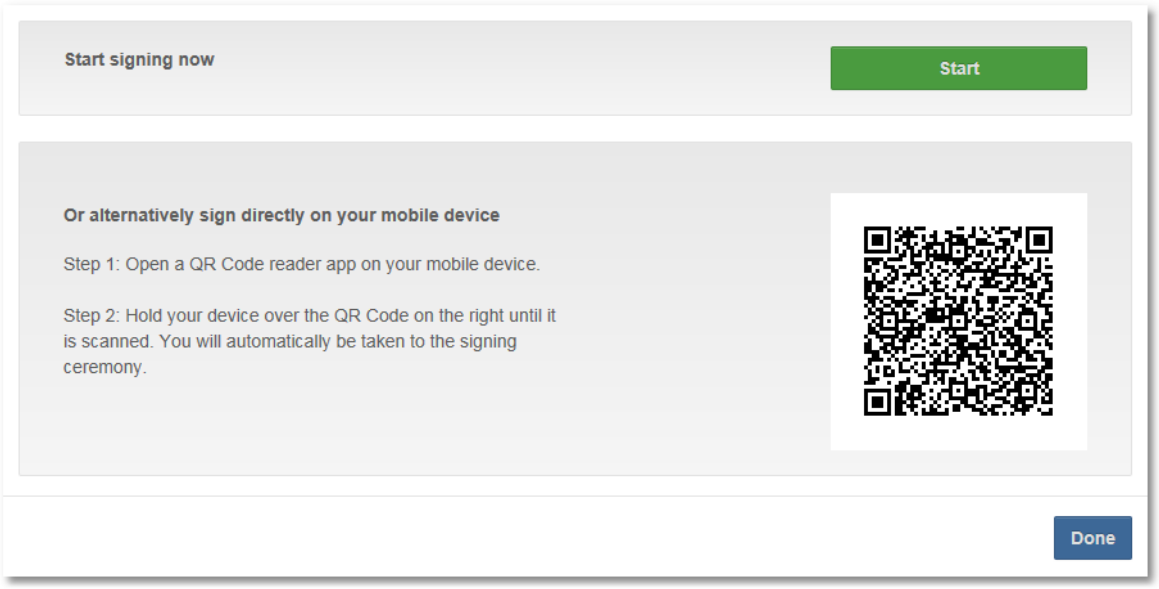
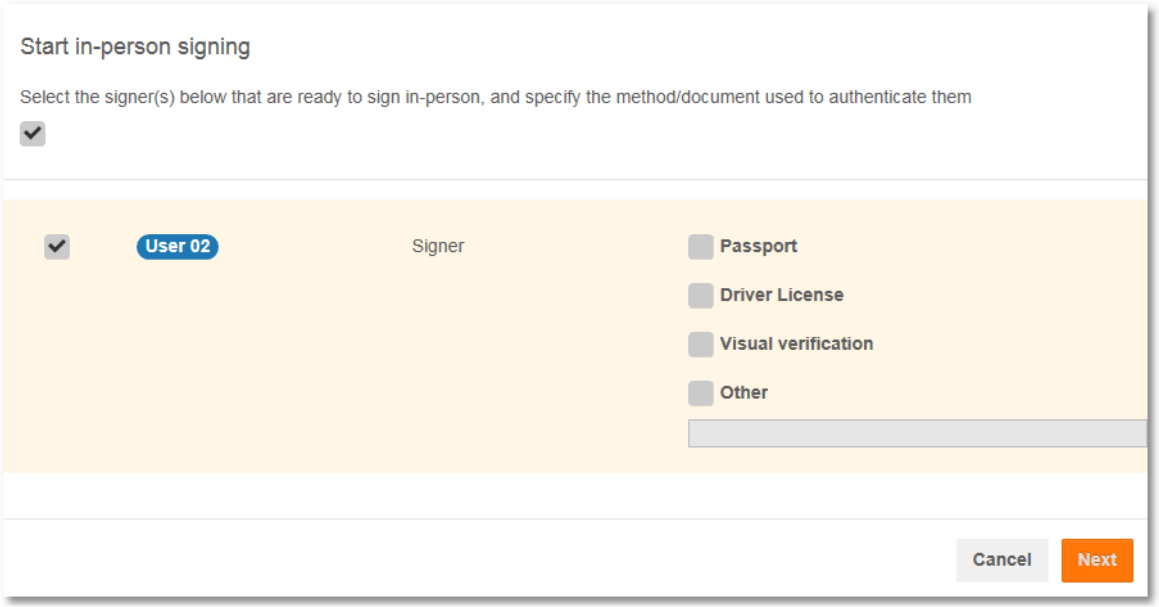


The wizard will guide you through the in-person signing process. The participants of the signing session will take turns completing their part. It is the signing host duty to ensure control of the signing device is passed on to the active signer.

Instructions for the Signing Host

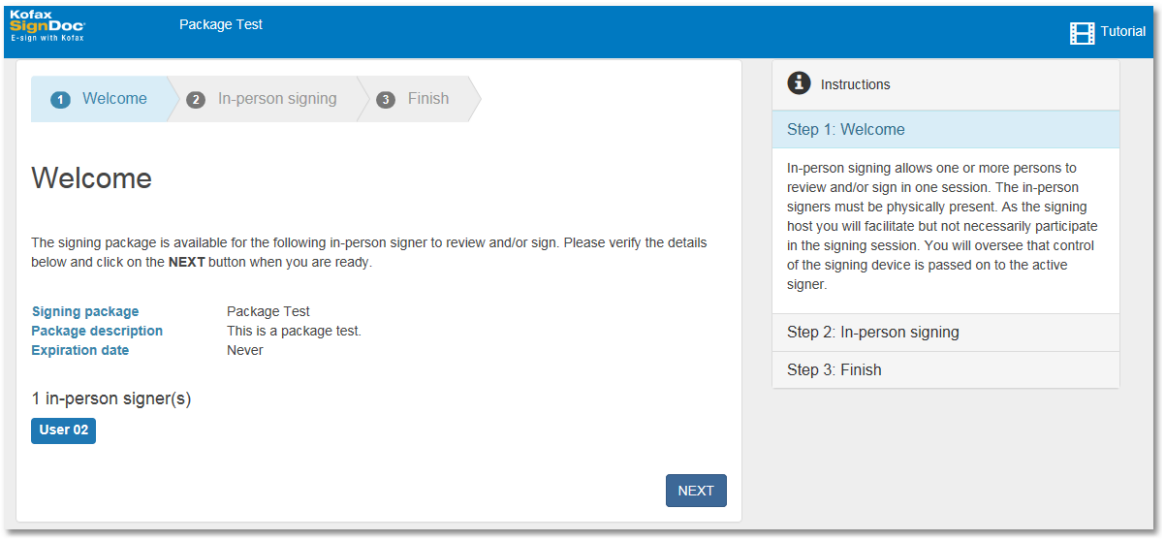
Select one or more participants for the in-person signing session. You will need to manually authenticate the signers before you can start the in-person signing session. Select one or more authentication mechanisms for each of participant. You can also add a text comment in the other field.



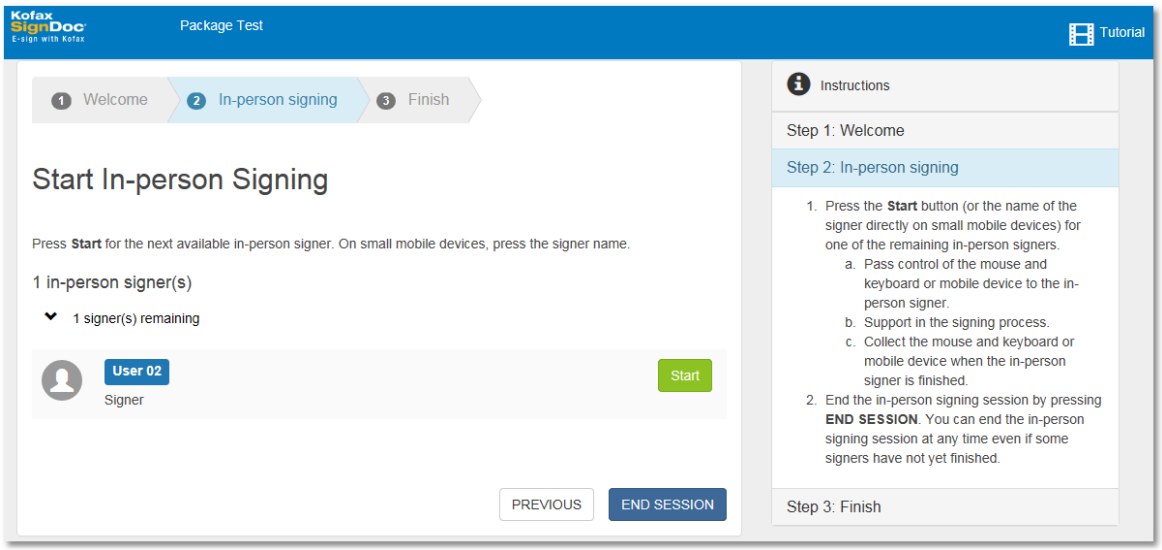
Disclaimer. Any information entered in the **Other** field will be stored as plain text, and will be visible in the audit trail.

Welcome Page for the In-person Signing Session

This page shows the necessary steps to sign packages. An additional description for each step is provided in the Instructions panel.



After verifying the details click the **NEXT** button to start the in-person signing session.

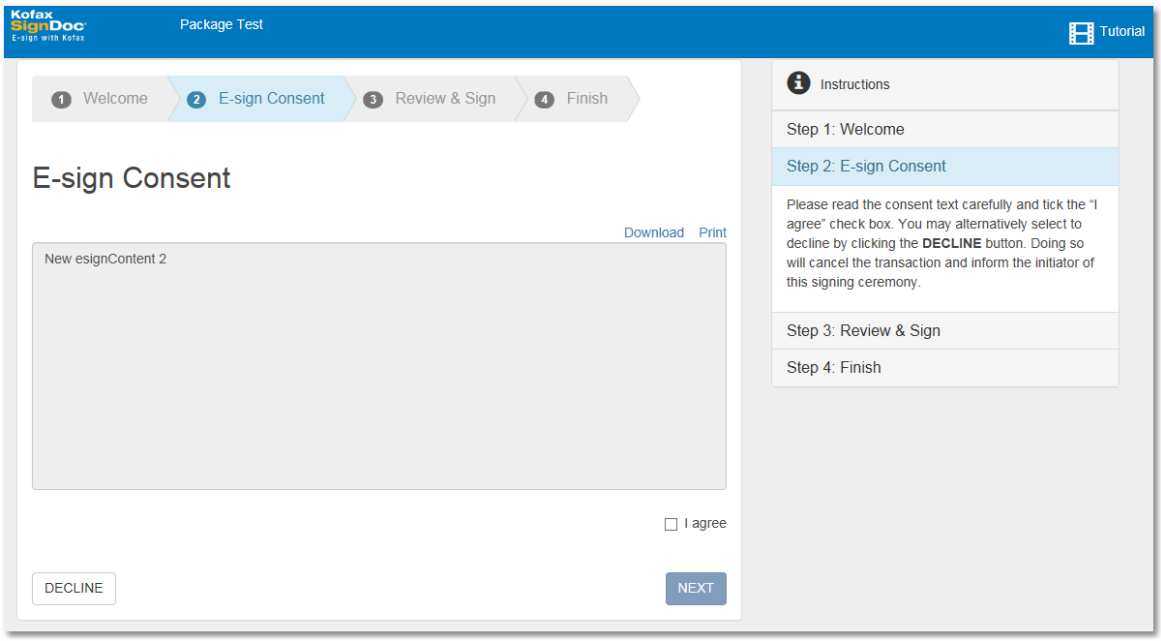


The next step requires the signer to Agree with Electronic Signing.

5.4 Agree with Electronic Signing

Signers and reviewers must confirm the use of electronic documents in order to view and sign them.

- The e-sign consent can be downloaded and printed.
- The **NEXT** button on this page is disabled as long as the agree check box is not checked. After that, the **NEXT** button is enabled. The recipient will be directed to **Review and Sign** documents page.



The "E-sign Consent" text included in the srollable region has to be read carefully by the signer.

Ticking the **I agree** check box enables the **NEXT** button to continue with the review and sign step.

By clicking the **DECLINE** button the transaction will be canceled and the the initiator of this signing ceremony will be informed about this decision.

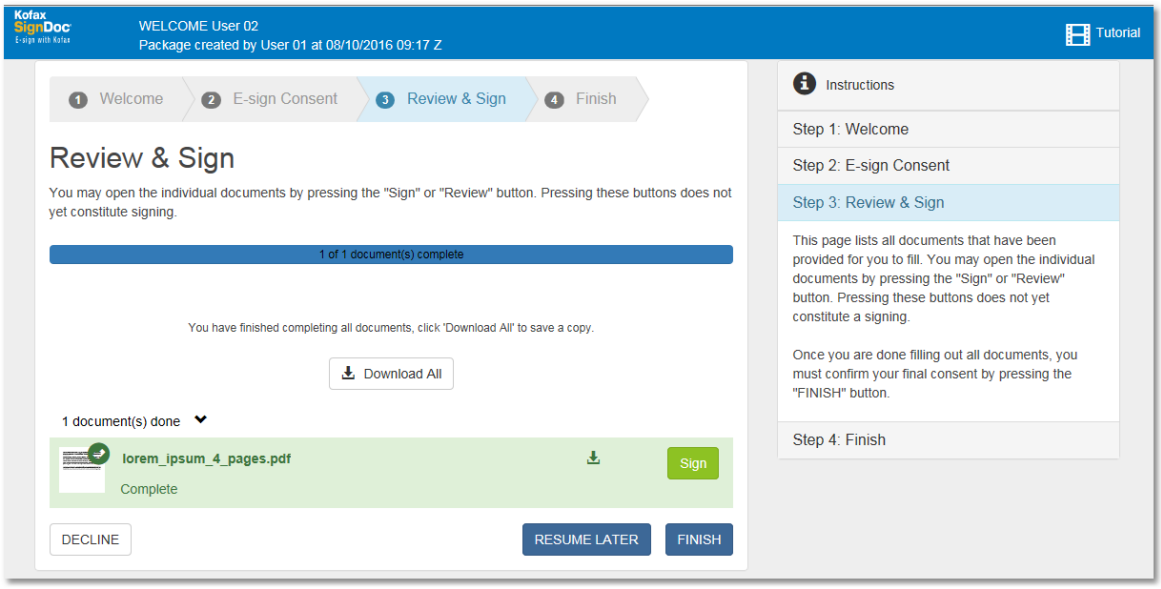
NOTE

In case of a common signing session the signer needs to accept the signing consents only once per session.

5.5 Sign Document(s)

On this page users get an overview of documents included in the signing package. The recipient selects a document for signing.

For each document status information is shown (**Complete**, **Action required**, **Review**). Clicking on the action button (**Sign** or **Review**) of the row will open the document.



Click the **RESUME LATER** button to save all changes without the user finishing the package.

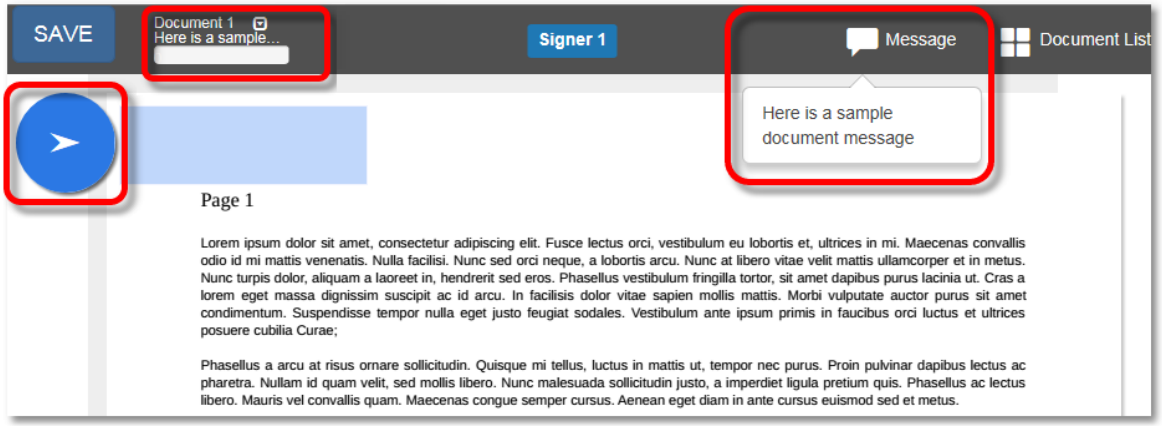
The **FINISH** button is only enabled, if all required fields of all documents of the signer are completed and/or all documents have been reviewed by the reviewer. Once a user has finished they can no longer edit the documents in the package.

The finished documents are shown in the upper area of the page.

NOTE

If the document is opened for reviewing the recipient is not allowed to sign or to fill other editable fields.

All pages of the document are displayed in a continuous paging view.



In the header you can see the title and description of the current document.

If a document message has been set, a message icon is shown.

Documents may have form fields that recipients need to complete. Fields in the document are shown with a blue background. Required fields are marked with an asterix. Users can click the fields to fill them in.

A form filling guide is displayed on the left side of the page to assist navigation to the required fields of the document. On mobile devices this guide is shown in the toolbar. The guide will point users in the direction of the next required field. You can also click the guide to automatically scroll there.

To sign, click on the signature field and follow the instructions. You can also remove any signatures added by clicking again and pressing **Clear signature**.

If the **Signer certificate required** option is enabled (see Signer certificate required), a client certificate will be requested the first time you sign a field in any of the documents. This certificate will be used for all subsequent digital signatures for the current signer unless removed.

After the signer certificate is available to the signing session a new icon will be visible in the toolbar.

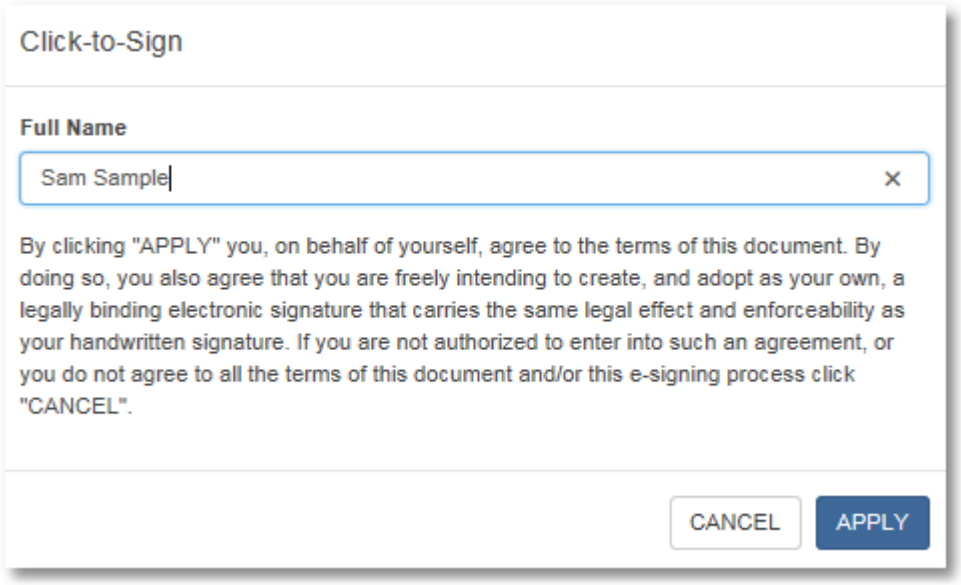
Clicking the icon will display information about the certificate. From this dialog you can also remove the certificate from the signing session

After clicking the icon a message will inform you that the Client Signing certificate has been removed and a different certificate may be applied to new signatures.

There are three signing options.

1. Signature: sign with your mouse or signature pad.

2. Click-to-Sign: sign by typing your name.



3. Photo Capture: use your device's camera to take a picture to sign with. To take a picture press the **SNAP** button. If you would like to take the picture again press **RE-TAKE**. Once you are satisfied with the picture press the **APPLY** button.

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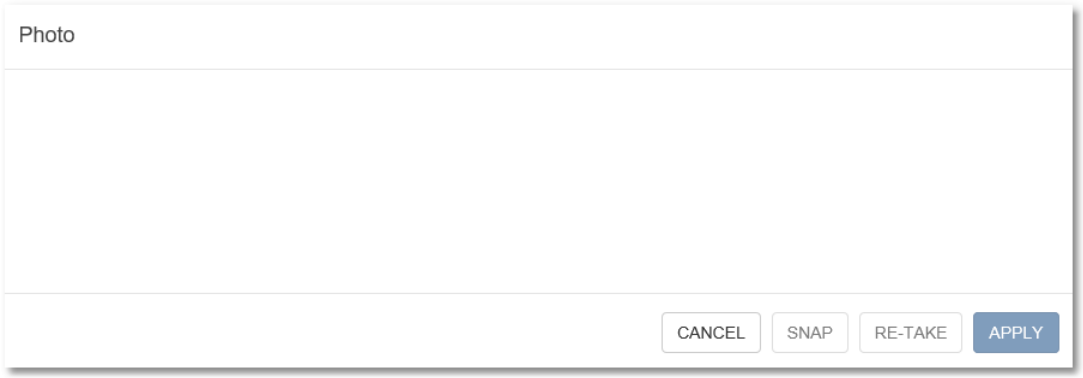
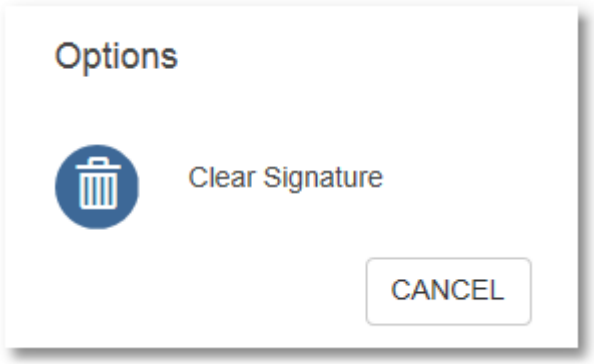


NOTE

If no camera is connected you have the possibility to download an image from your computer.

You can also remove any signatures added by clicking again and pressing **Clear Signature**.



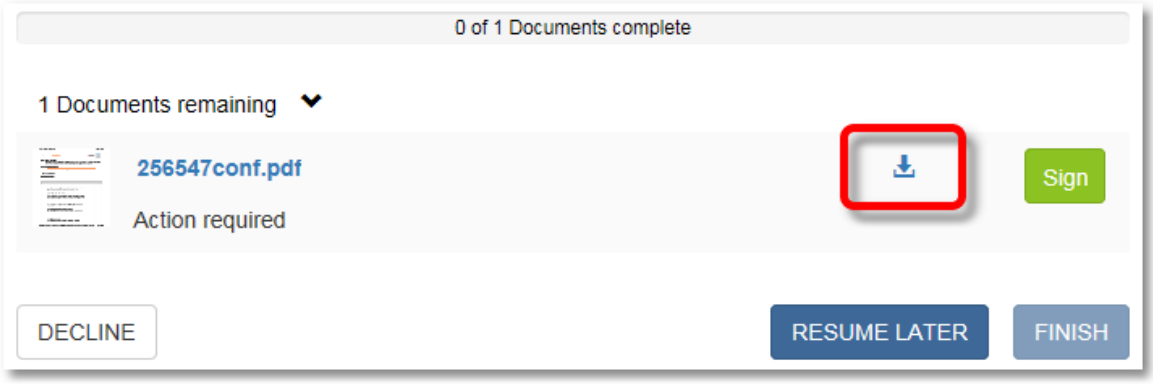
REMARK

The availability of the signing options depend on how the document was prepared.

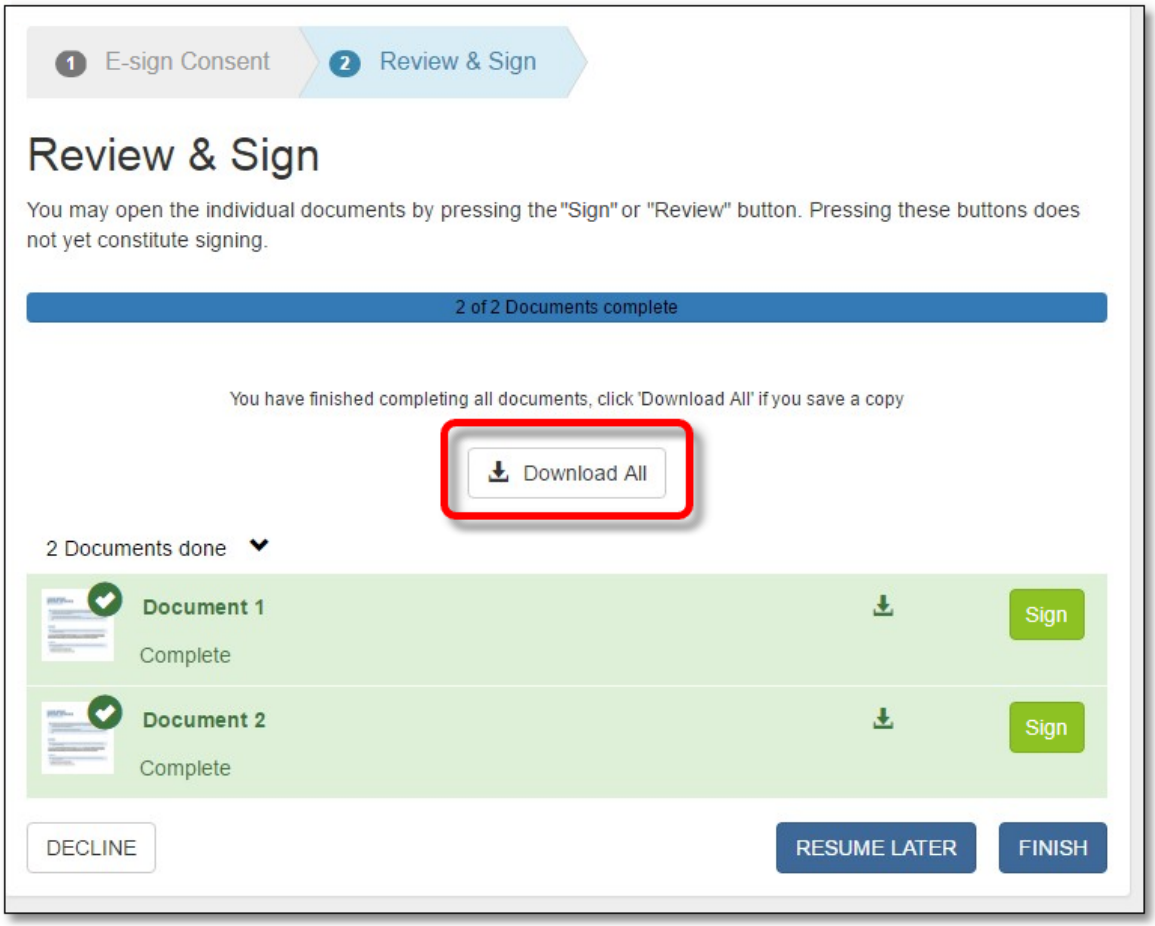
Once you are done editing or reviewing the document press the **SAVE** button to save your changes and return to the previous page.

Download your Documents

To download your documents, click the **Download** icon:



After you have finished filling or reviewing all your documents, click the **Download All** button to save all of your completed documents as a zip file:



When all documents are completed and the user is returned using the **SAVE** button to **Review & Sign** page then the **FINISH** button is highlighted and the recipient can finish the view and sign process.

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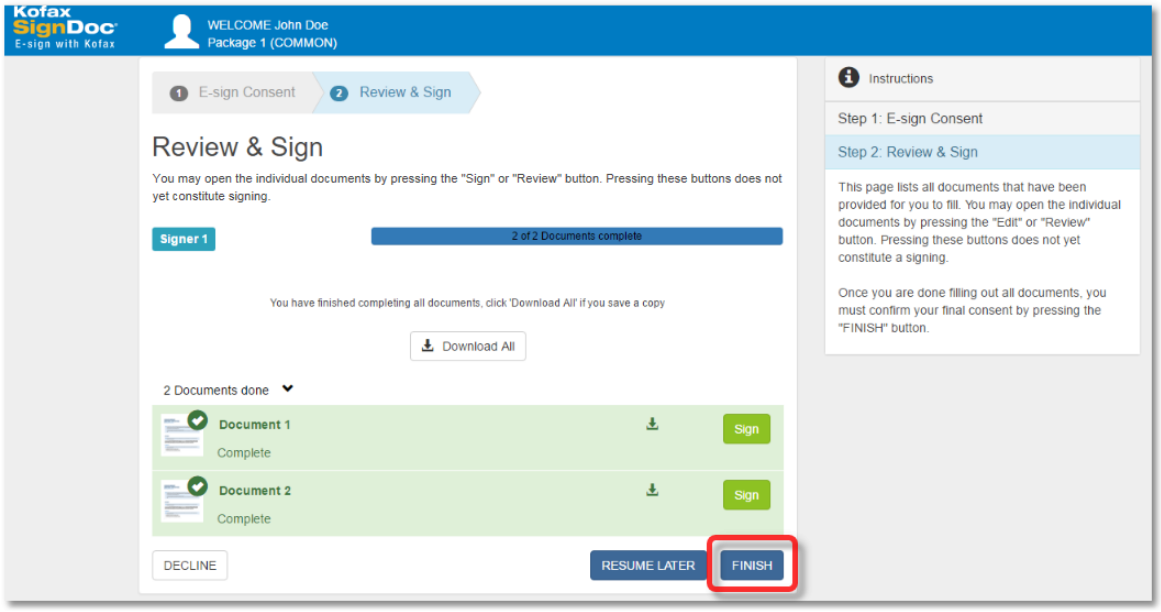


NOTE

Recipients can select **FINISH** button only when all required actions for them for all documents are done.

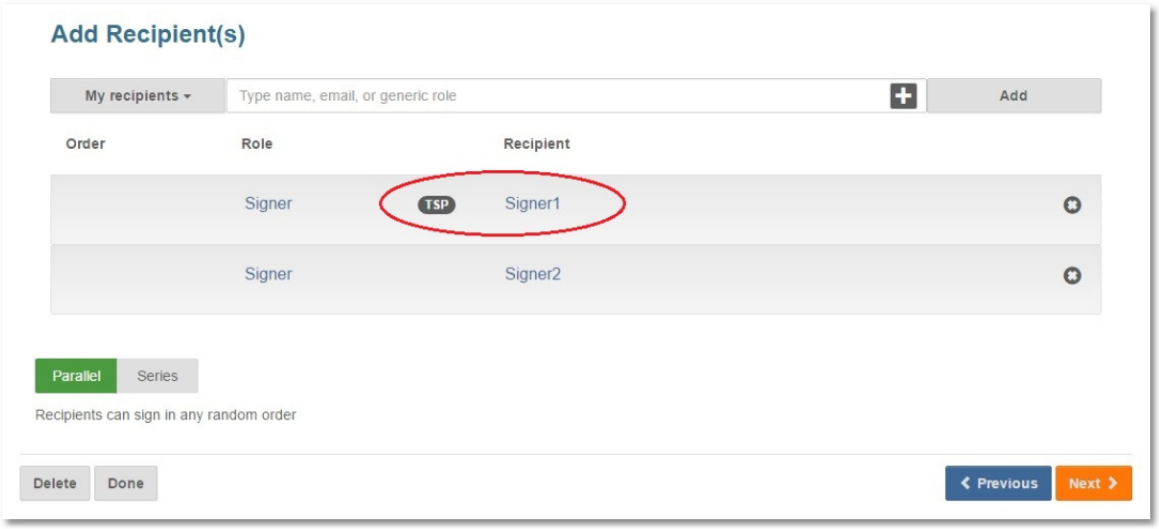
Clicking on **FINISH** button Kofax SignDoc guides the recipient to the **Completeness & Thank you** page.

5.6 TSP Signature

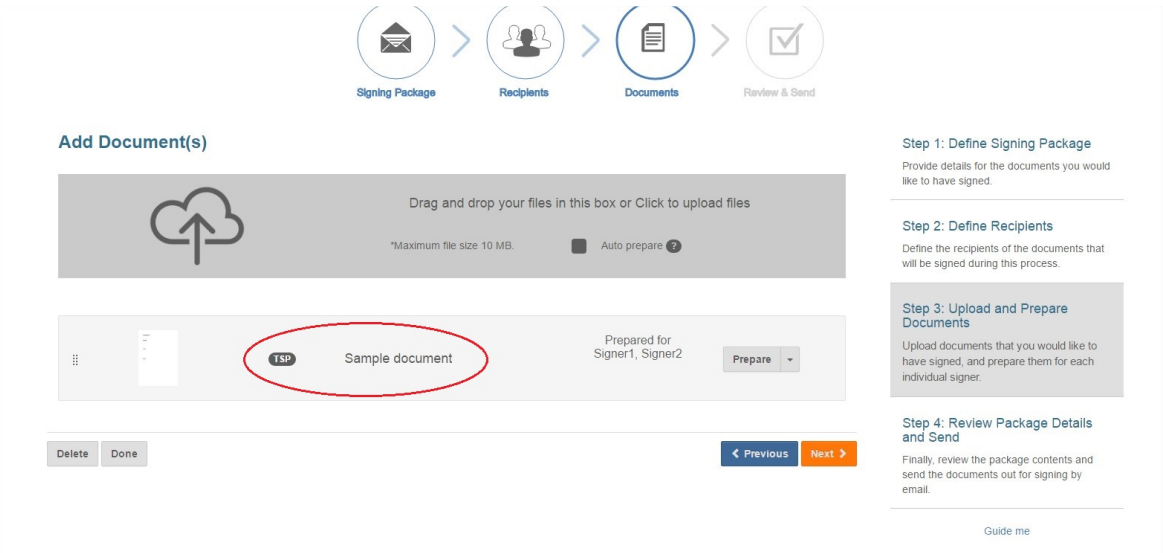
A trust service provider (TSP) is a legal entity providing and preserving digital certificates to create and validate electronic signatures and to authenticate their signatories. The trust service provider has the responsibility to assure the integrity of electronic identification for signatories.

A TSP signature can be defined through the REST API for every recipient per document. It is not possible to define TSP signature via User interface but it is possible to see when TSP signature is required for the document in the **Package** wizard and **Manage Packages** page.

1. **Add Recipient(s)** page of the **Package** wizard:
   The TSP icon indicates that the recipient is requested to sign a document with a TSP signature.



2. **Add Document(s)** page of the **Package** wizard:
   The document marked with the TSP icon is prepared with a TSP signature, that has to be signed by the recipient.



3. **Review and Send** page of the **Package** wizard:
   For every signer it is displayed whether a certificate is required or not. The type of the TSP signature is also displayed for the recipient.

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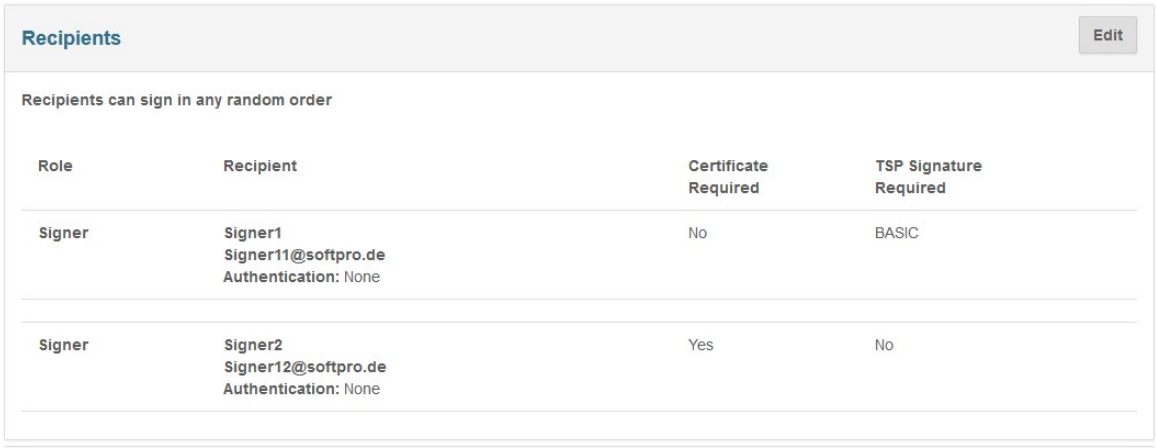
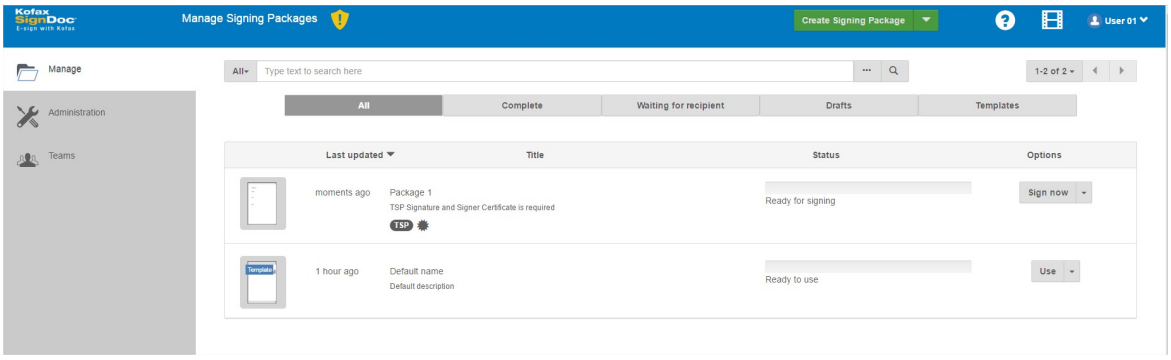
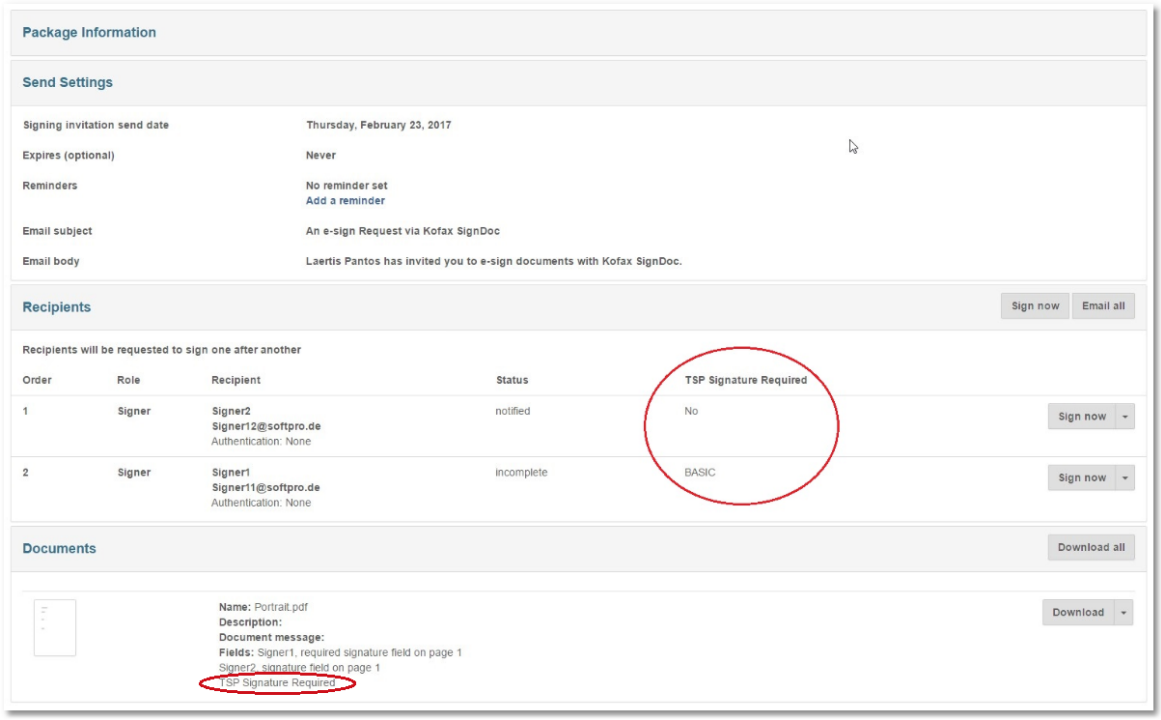


4. **Manage Signing Packages** page:
   The TSP icon is visible if at least one signer has to sign at least one document with a TSP signature.

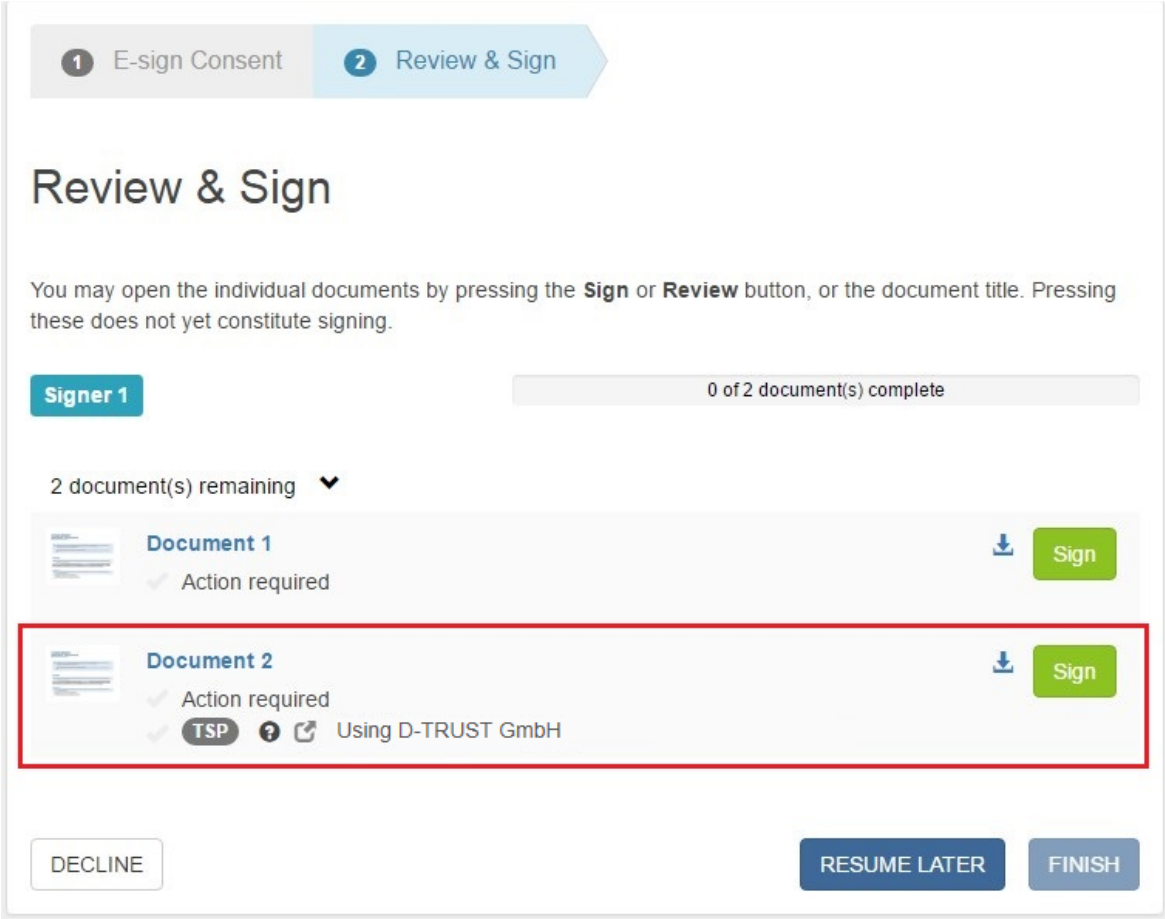


5. **Package Information** page:
   In case a TSP Signature is required its type is shown in the **Recipients** section.

   In the **Documents** section, it is shown that the document has to be signed with TSP signature.



On the signing process the recipient can see when the TSP signature is required.

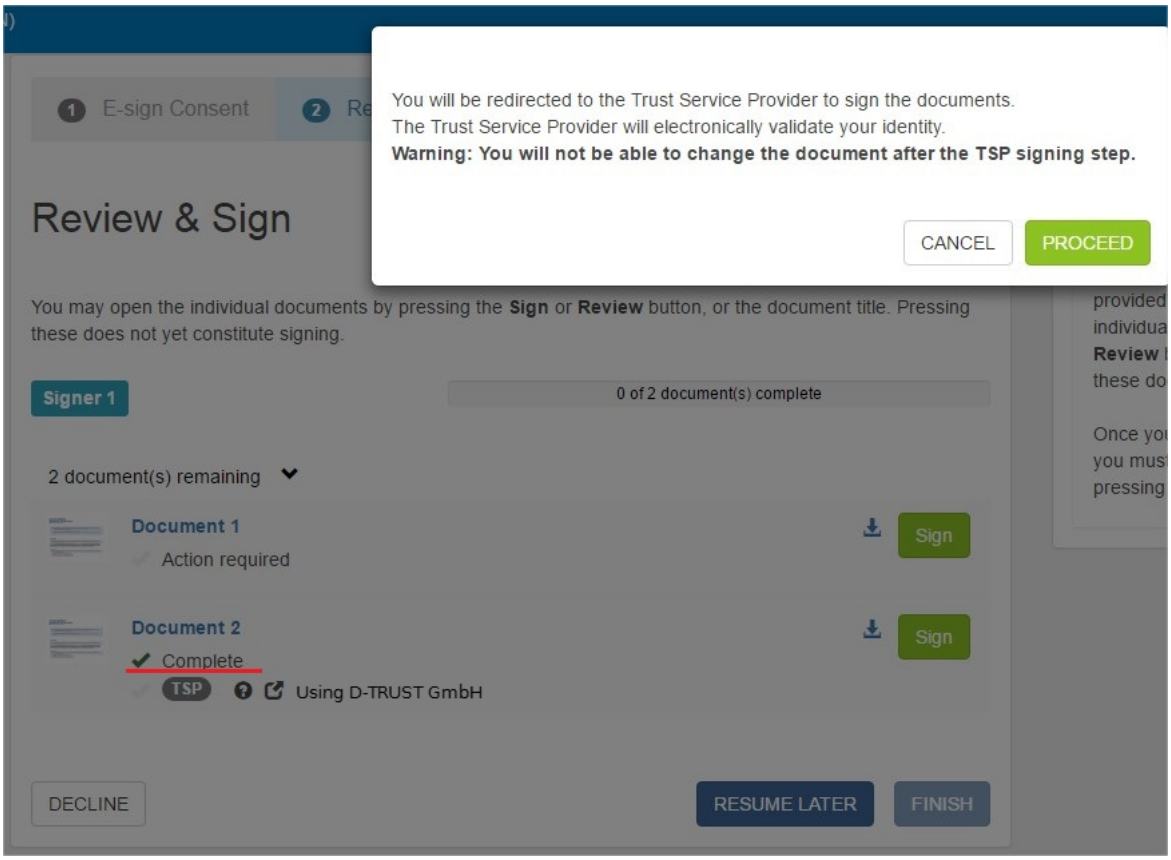


To proceed to TSP signature process all the required fields must be completed.

Complete all required fields and return to the documents list. A dialog with TSP information is displayed. Clicking **PROCEED** will redirect the browser to the TSP website to complete the TSP signing process.

WARNING

You will not be able to change the document after the TSP signing.



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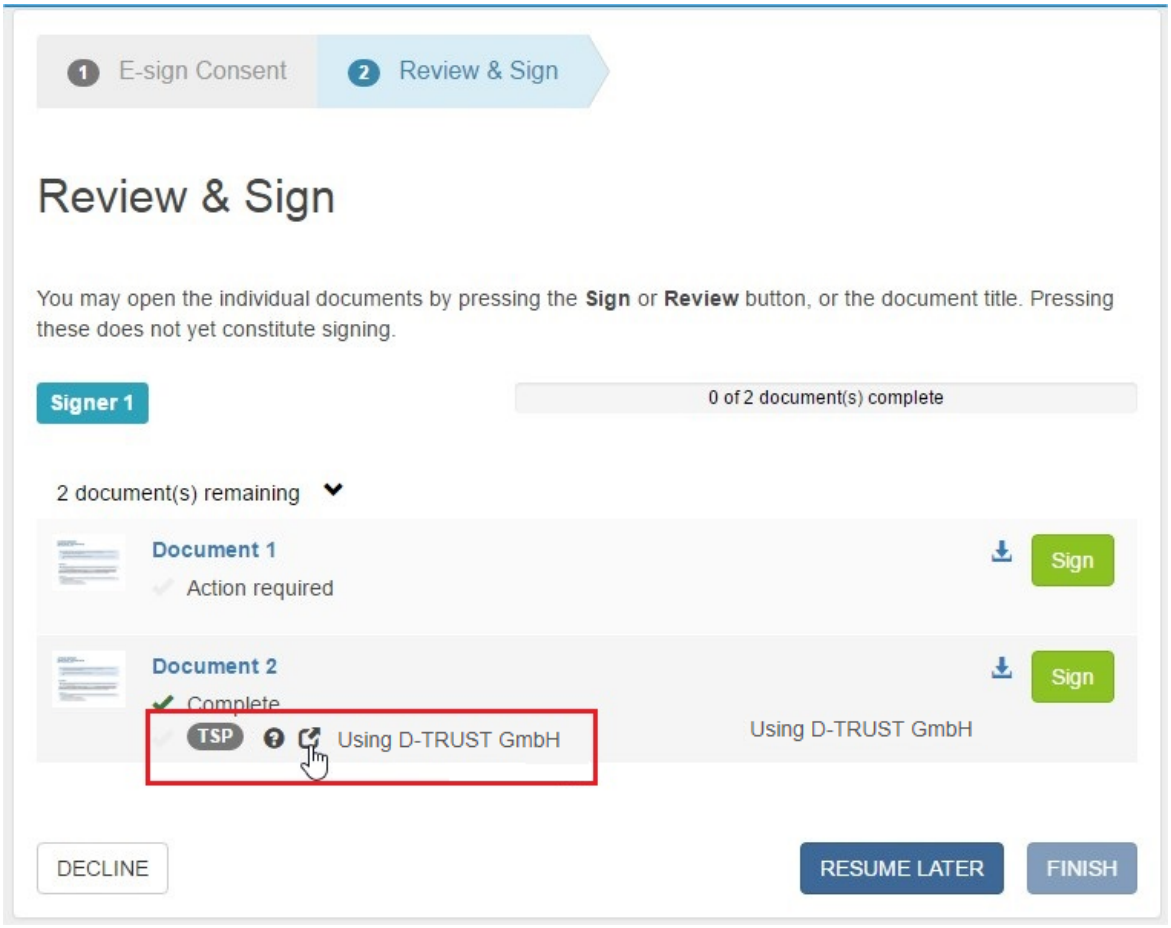
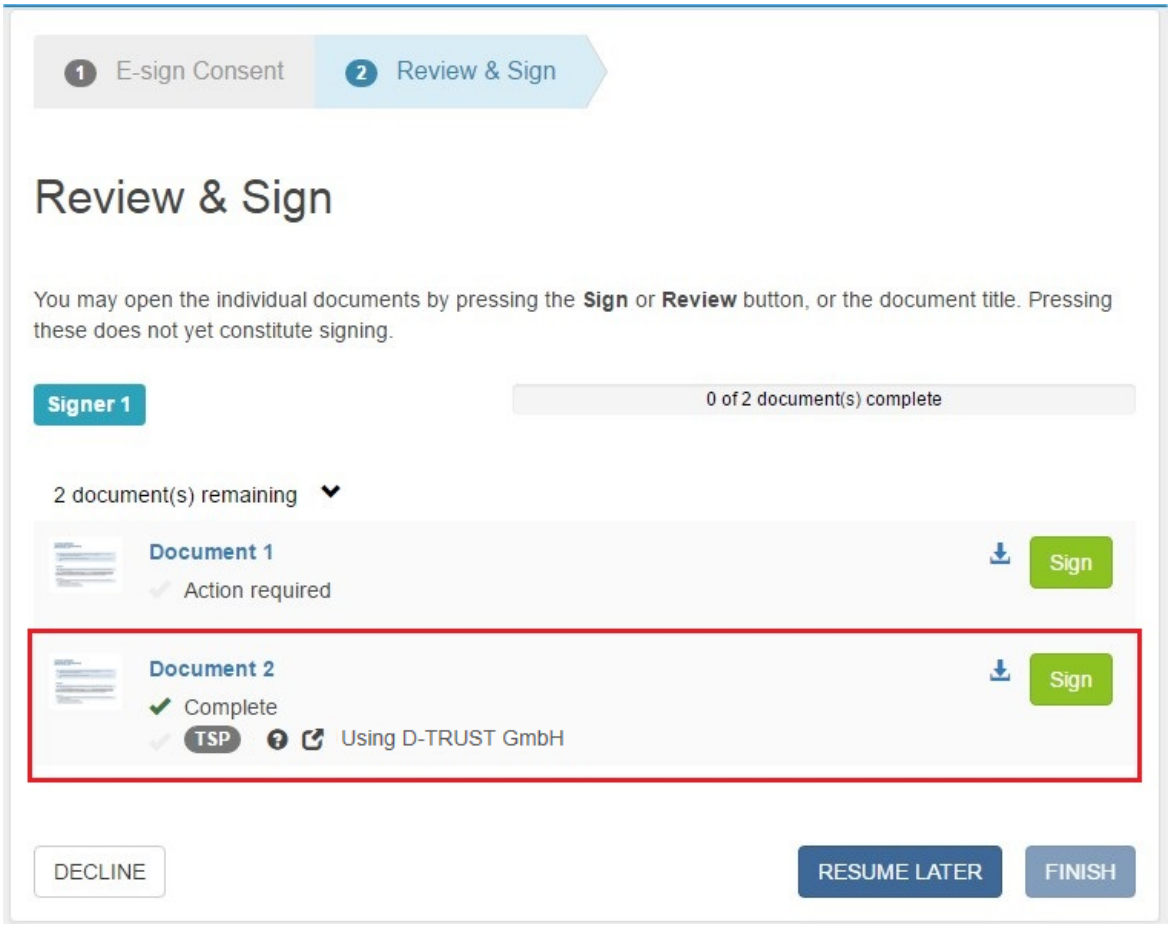
To reopen the TSP dialog and initiate the TSP signing process click .



The document is not finished until the TSP signature is completed.



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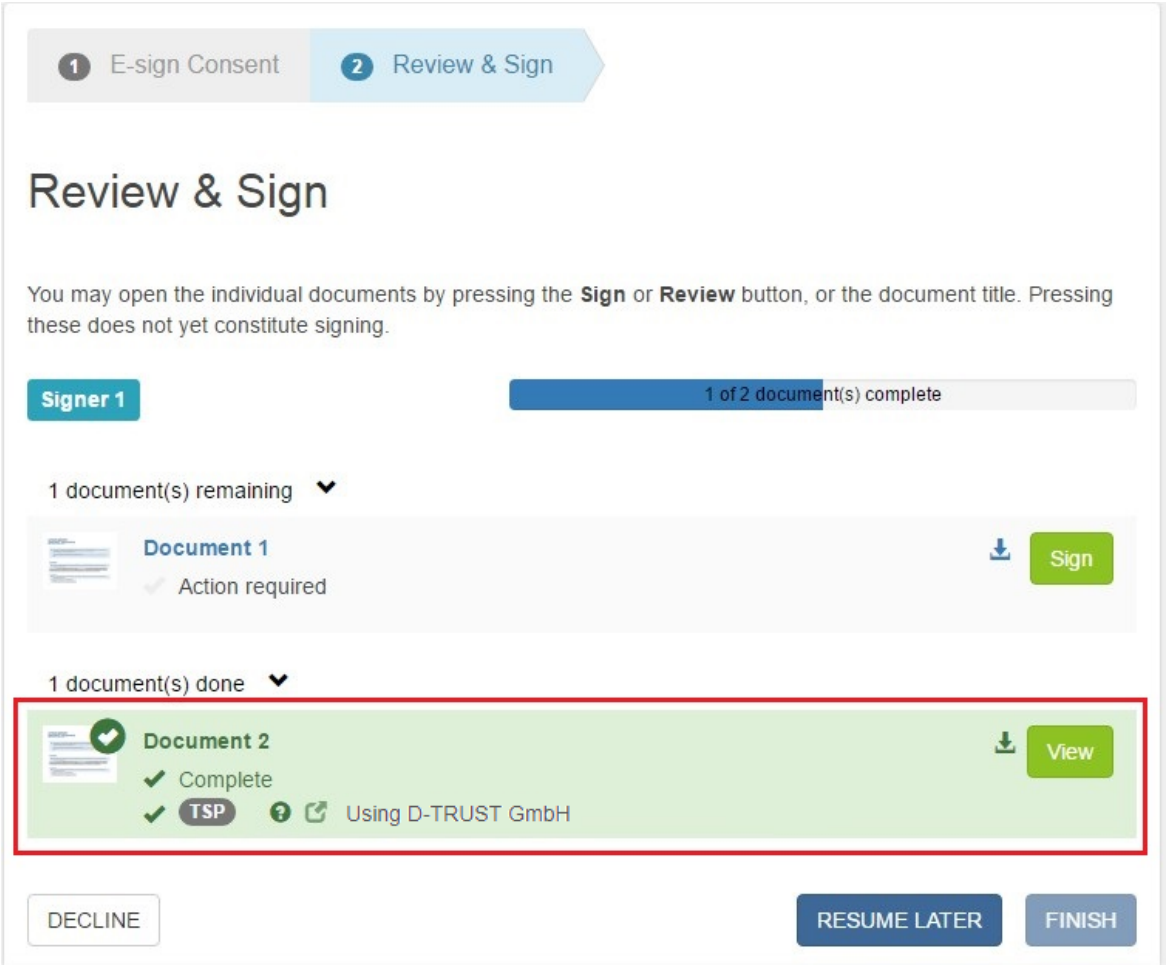
After the TSP signature is completed the document is set to read only mode, none of the fields can be changed.



5.7 Finish

Goodbye page

After the in-person or remote Signing Session has been ended you will be taken to the Goodbye page. This page will show a message confirming the end of the process. We recommend that you close your browser window.

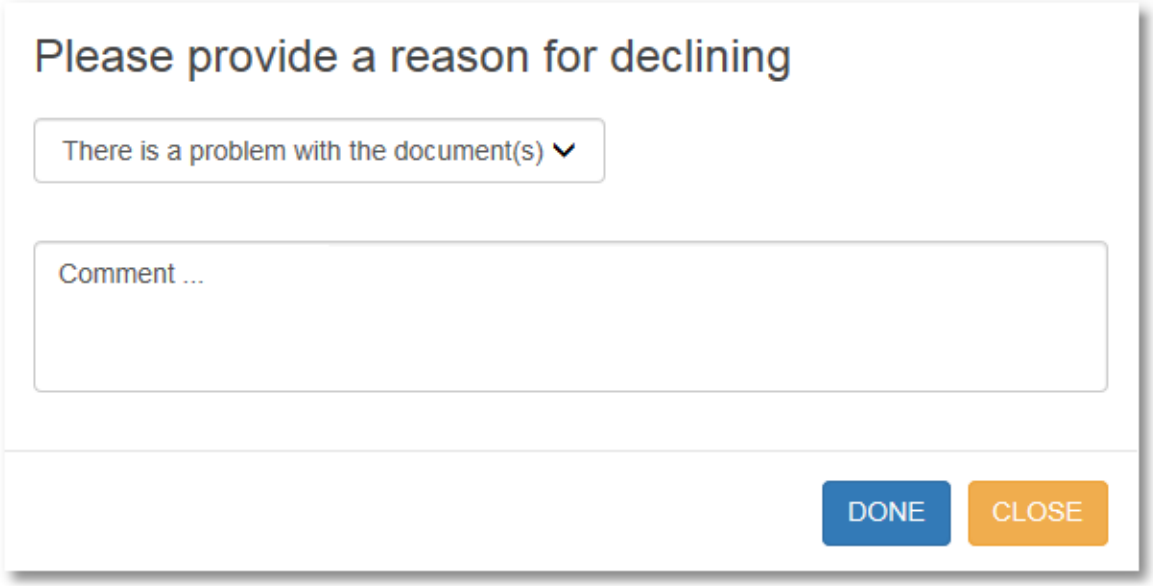
NOTE

Audit Trial information will be provided automatically to recipients and sender after the Signing Package is signed and reviewed by all requested persons.

5.8 Decline a Signing Package

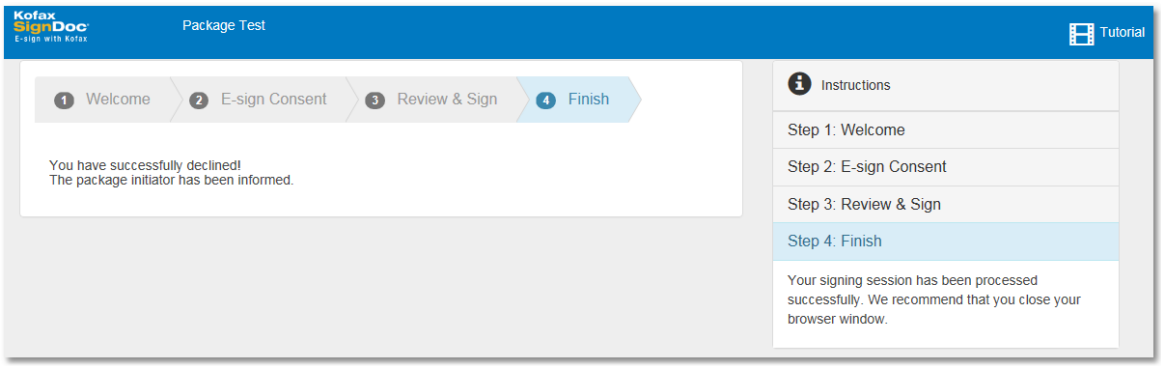
A recipient of a Signing Package can decline the Sign and Review process at any time.

The recipient is asked to provide a reason for declining. Recipients can type additional comments into a free text field.



The signing session for the recipient will be closed and the recipient will be redirected to the finish page.

The recipient will see following information:



The sender receives an email.

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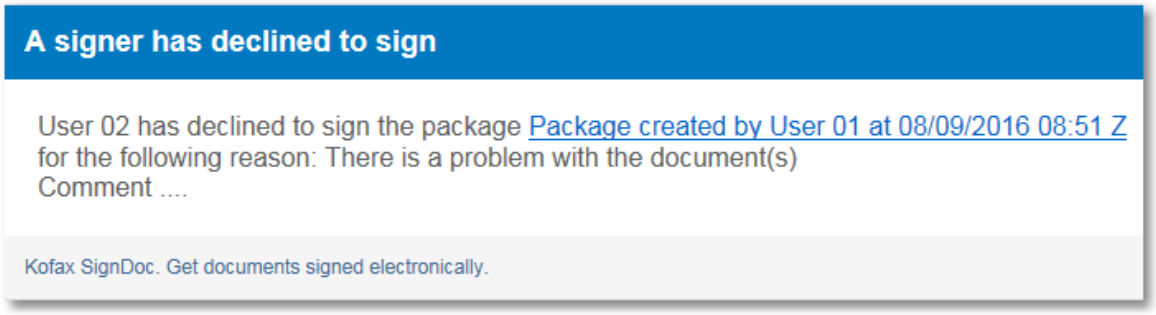
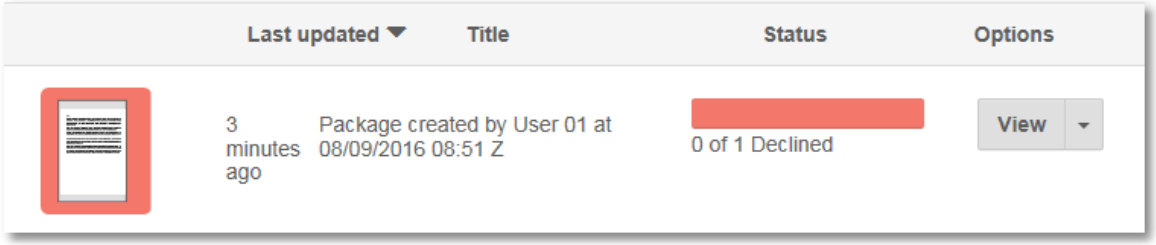


The Signing Package is displayed in the manage page with status declined.



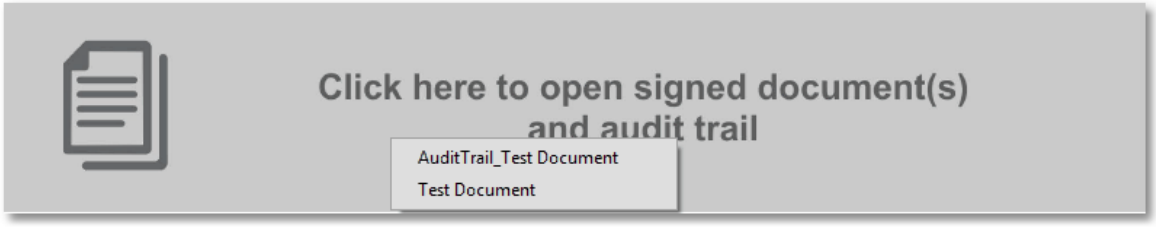
6 Completed Signing Package

The Final Document
Audit Trail

6.1 The Final Document

After all recipients have signed and reviewed the document(s), a final PDF document named with the Signing Package is sent via email by Kofax SignDoc. This PDF document includes information about the package and as attachment the signed documents and their audit trails.

1. Open the email attachment in PDF viewer (e.g. Adobe Reader) showing digital signatures.
   - Page 1 includes Instructions
   - Page 2 contains Package Information
   - Page 3 provide the Audit Trail for the package
2. Open attached documents.
   - option a: click on the grey area in the final document on page 1

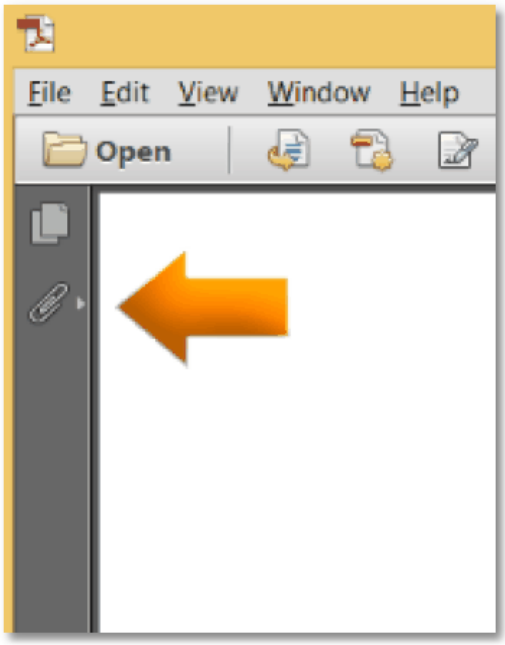


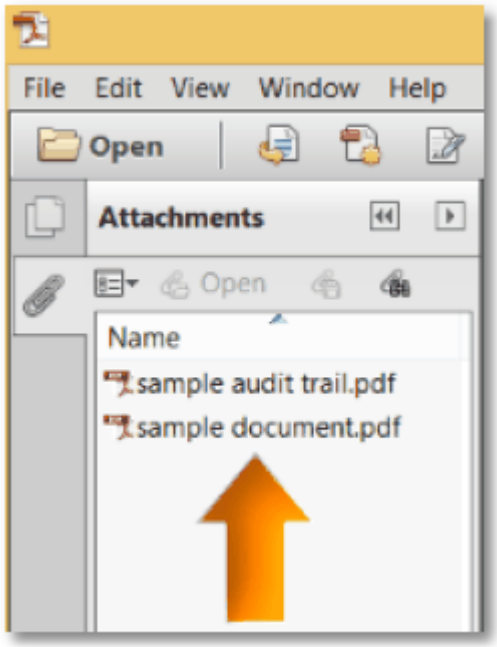
- option b: using e.g. Adobe Reader controls

Click the attachments tab on the left bar (the paperclip icon)

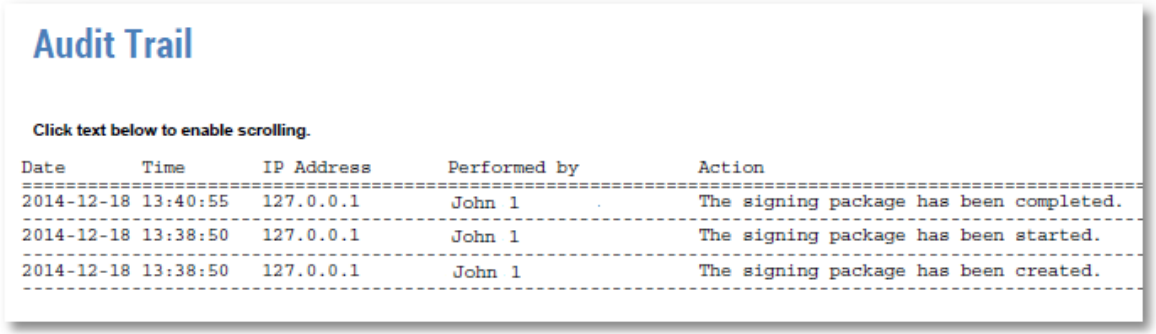
Open attachments

Attachments panel automatically opens, listing the attached files open these files for viewing





3. Select document to view.
4. Goto page with Audit trail information.



Audit Trail

Click text below to enable scrolling.

Date	Time	IP Address	Performed by	Action
2014-12-18	13:40:55	127.0.0.1	John 1	The signing package has been completed.
2014-12-18	13:38:50	127.0.0.1	John 1	The signing package has been started.
2014-12-18	13:38:50	127.0.0.1	John 1	The signing package has been created.

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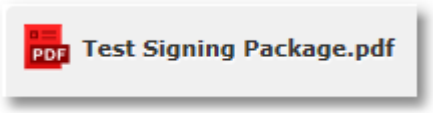
6.2 Audit Trail

The audit trail for a Signing Package and the signed documents is distributed immediately after completion to all recipients of a Signing Package as one document readable in standard PDF viewers like Adobe Reader. It is included as attachment to the email.



The audit trail records all relevant actions during the Signing Package life cycle. This means it contains relevant actions/data created within the Kofax SignDoc.

An audit trail contains information about

- the signing package
- the recipients of the signing package
- performed actions for accessing the signing package for each recipient
- performed actions for each document of the signing package in chronological order.

The tables below show more detailed information contained in the audit trail.

Package information

Information	Description
Package Name	The name of Signing Package
Package Description	The package description
Package ID	The unique identifier for a package
Date Time created	The date and time the Signing Package was created.
Status	Signing Package status when the audit trail was generated. Completed: The status is used when the Signing Package is completed by all recipients
eConsent Text	Text which the signer or reviewer has to accept before accessing the Signing Package. This text can be changed by the Kofax SignDoc Account Owner.
Date Time completed	The date and time the Signing Package was completed.

Information	Description
Actions	The events recorded for activities on the package container (see section Actions).

Recipient list

Information	Description
Name	The name of the recipient
Email address	The email address of the recipient.
Role	The role of the recipient: either signer or reviewer
Date time completed	The date and time the recipient has completed the required actions for package.
Authentication	The used method for authentication
Actions	The events recorded for activities of the recipient independent from the document (see section Actions).

Document list

Information	Description
ID	The identifier for the document.
Name	The name of the document
Description	The document description
Actions	The events recorded for activities on the document (see section Actions).

Action

Information	Description
Date Time	The date and time the action was created.
IP Address	The IP Address provided from the computer where the Internet Browser was opened for the action.
Performed by	The name of the recipient performing the action.

List of Actions

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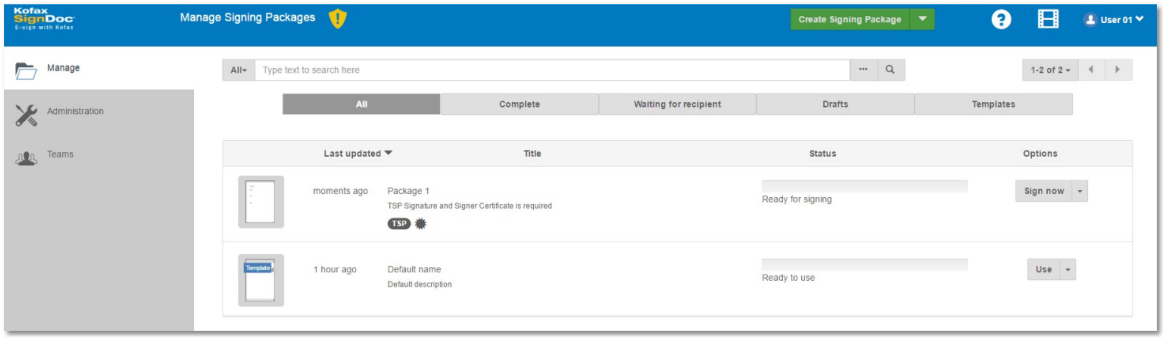
Information	Description
Open	The action when a document is opened
Viewed page	The action when a recipient visits a document page.
Acceptance of eConsent	The action when a recipient agreed to e-sign consent.
Authentication	The action when a recipient is authenticated.
Signed	The action when a recipient signed.

7 Manage Packages

Kofax SignDoc central overview page is responsible to manage user's Signing Packages and Template Packages. The **Manage** page offers following features:

- Searching for packages
- Select actions for packages like View, Edit, Void, Use, ...
- Access for user preferences, help, guide me
- Create packages



The Signing Certificate icon is visible if at least one signer required a Signing Certificate.

Each package is shown with its

- document thumbnail:
  - Signing Package: A thumbnail of the first page of the first document will be placed atop a rectangle.
  - Template Package: A thumbnail of the first page with the label Template of the first document will be placed atop a rectangle.
- date and time of last update
- package title

- TSP required
- Signer certificate required
- package status information
  - shows a progress bar when Signing Package is ready for sending.
    - The blue bar shows the completed part and the orange part still needs to be done.
    - A text below the bar indicates how many recipients already signed or reviewed the documents.
- available actions for packages
  - View, Edit, Void, Use, Delete, Archive and Sign now for in-person signing
  - The View action offers additional actions for the Signing Package
    - Resend Signing Package, Download documents, Cancel Signing Package, Create Template from Signing Package, View History, Sign now for in-person signing

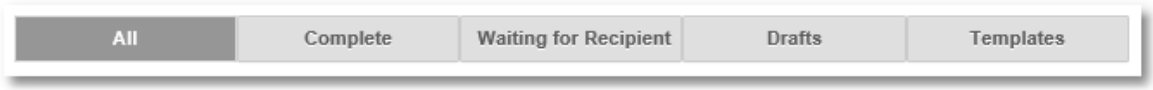
7.1 Search and List Packages

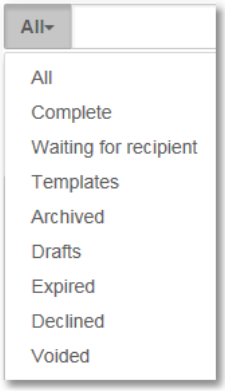
Search for packages

A user can filter available packages. Kofax SignDoc distinguishes between packages created by users themselves (default view) and packages created from team members (see Work in Teams).

By default the **All** tab is selected which means all packages of the logged in user and their team member are shown. If there are more packages available than listed, you can switch to the next page by clicking on the appropriate page number.

Kofax SignDoc has configured following filter tabs for user's packages.





Additional filter criteria are available in the drop down menu above the filter tabs.

For working on packages created by team members the user selects first the appropriate team.

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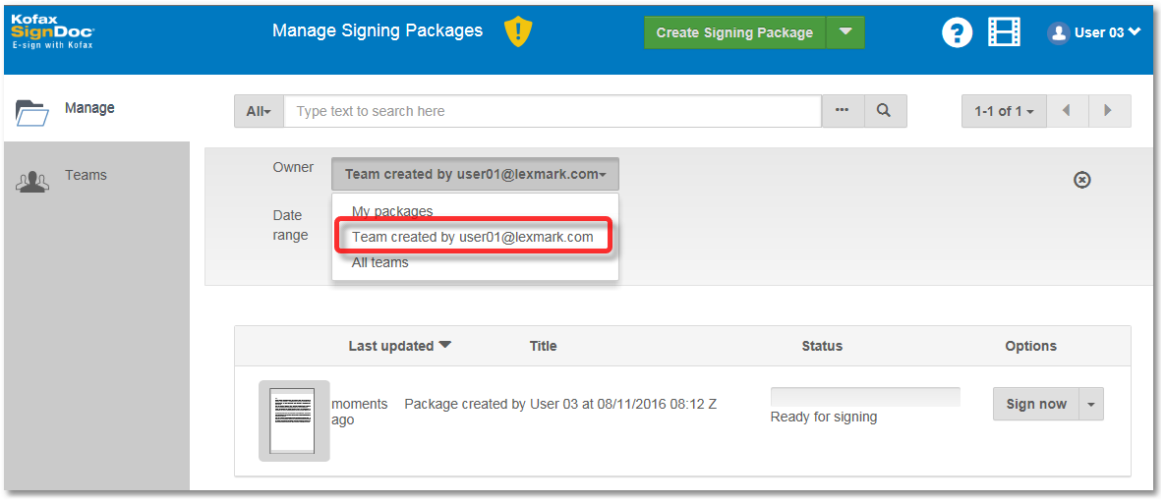
1. Select via the search extension (3 dots) the team.

2. Select the team.



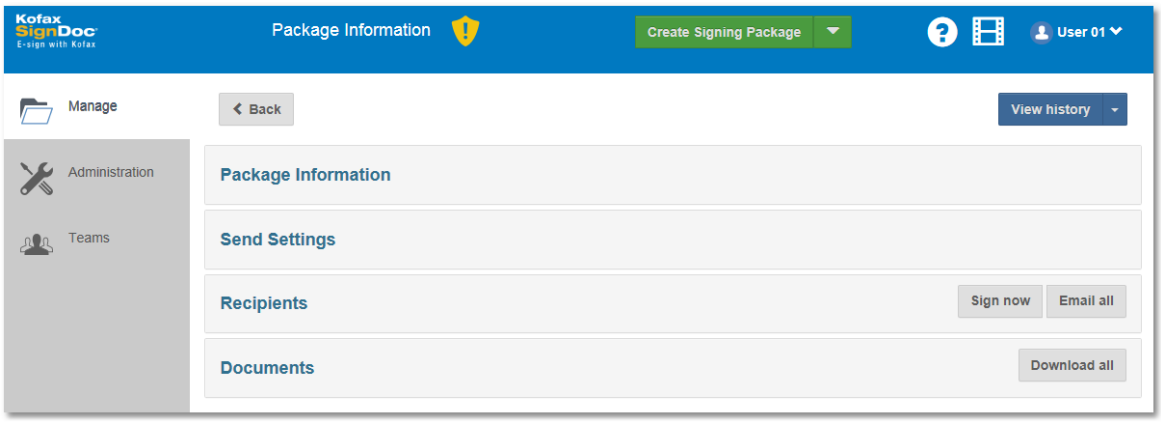
7.2 View Package Details

A user can view the details of a package when selecting **View** on the main **Manage** page for a dedicated package.

The **View** page shows information about

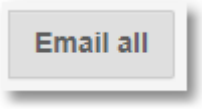
- Package information
- Signing Package send settings
- Recipients information
- Documents information

entered during the Create and Send Document phase of a Signing Package.



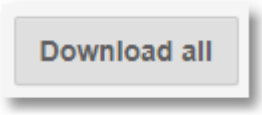
The View page allows the user to

- Resend a Signing Package to all or only to one recipient
  Sometimes a Kofax SignDoc user is requested to resend the Signing Package to recipients.

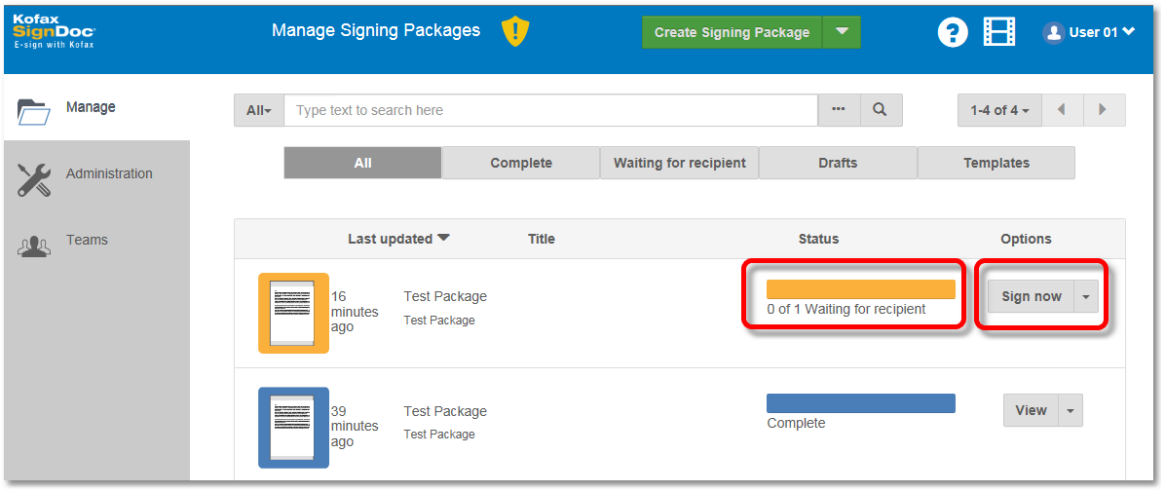
  A new email address of the recipient can be entered. Changing the email address of a recipient is available if you email only one recipient.

- Download documents e.g. to offer them via another channel
  Sometimes a user is requested to send the documents for e.g. reviewing to another person.

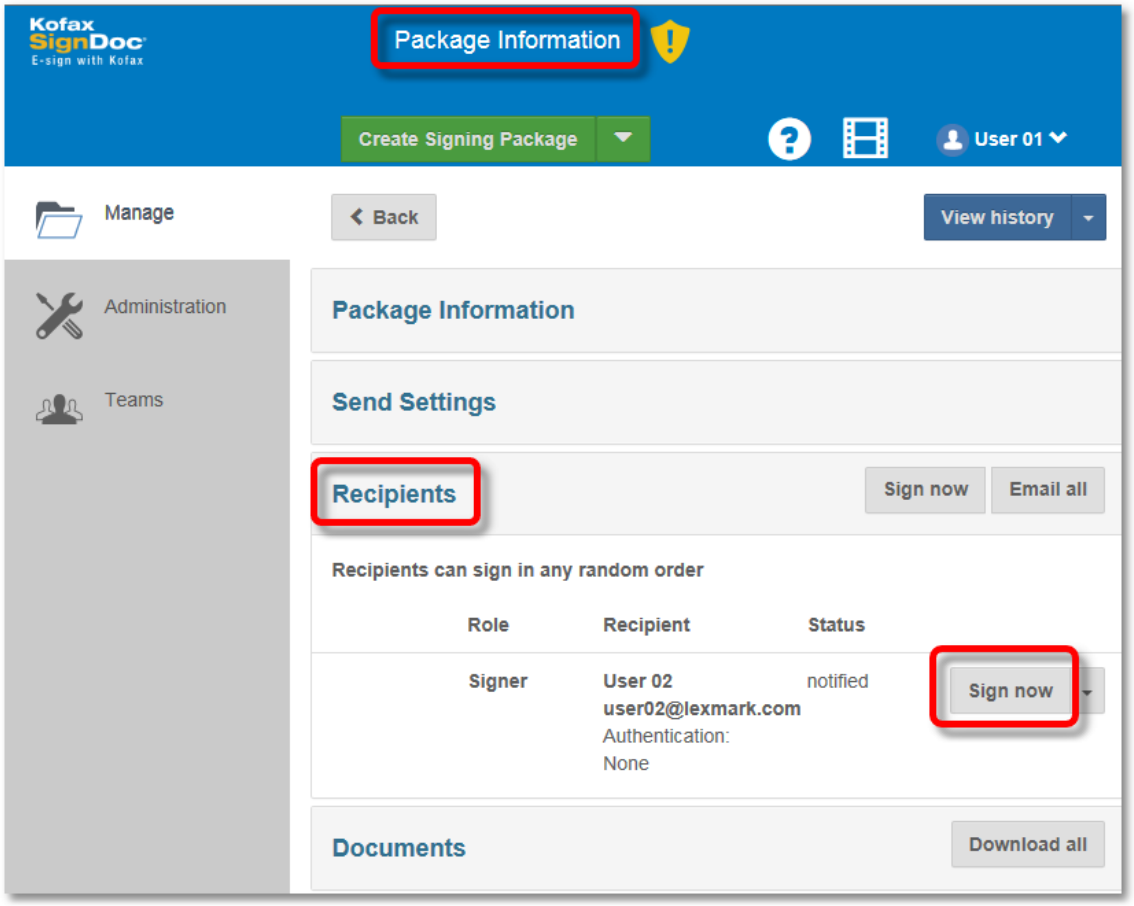
  

Sign Now

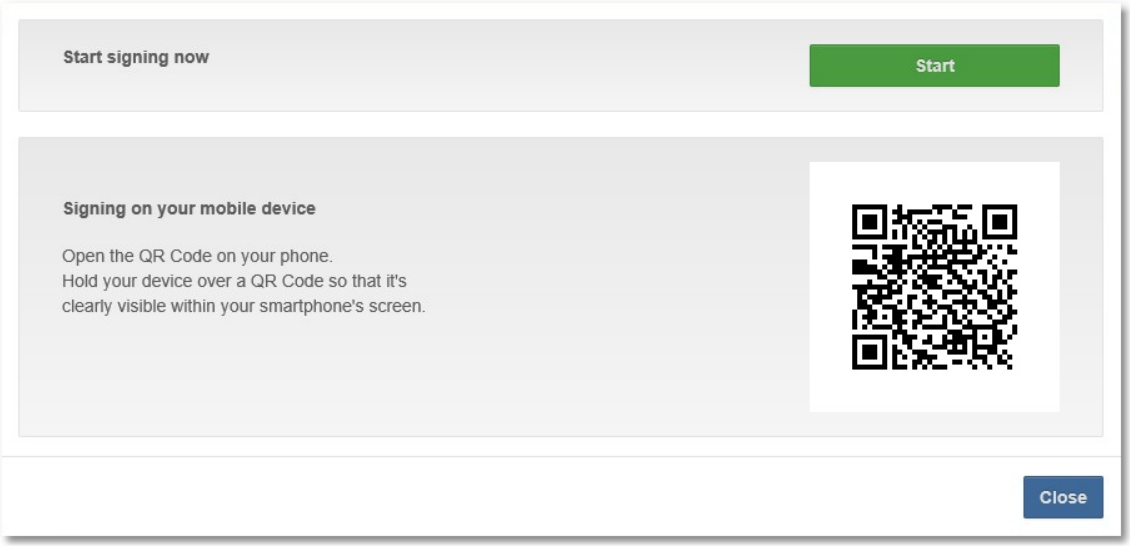
There is a **Sign Now** button for every recipient in a signing package on state **Waiting for recipient**.



1. On the **Package Information** page in **Recipients** section select **Sign now**.



2. After authentication a modal dialog should appear containing the QR code and a **Start** button which starts the Kofax SignDoc guided signing and review process.



To use the QR code follow the description on the left side of the dialog.

NOTE

Some QR Code Readers use their own browsers to open read links by default.

Therefore when using a QR Code Scanner it is recommended that the website should be opened in a supported browser for signing a package.

See In-person Signing Session for a description of the Sign Now process.

7.3 Void, Delete and Archive Signing Packages

Beside viewing the details of a package Kofax SignDoc offers additional features for handling Signing Packages by the Kofax SignDoc user.

NOTE

Not every action is available in each status of a Signing Package.

Void

The sender of the Signing Package (Kofax SignDoc user) has canceled the Signing Package as long it is not completed. A confirmation message box is shown. If the user confirms the signing package is voided and can be deleted from the system. Once a Signing Package is voided, recipients cannot longer view or sign the Signing Package. Recipients are notified by Kofax SignDoc.

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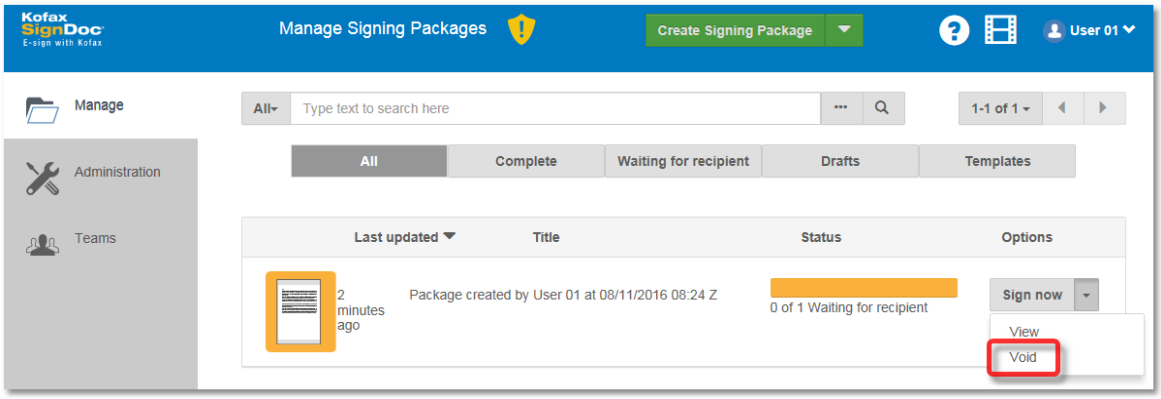
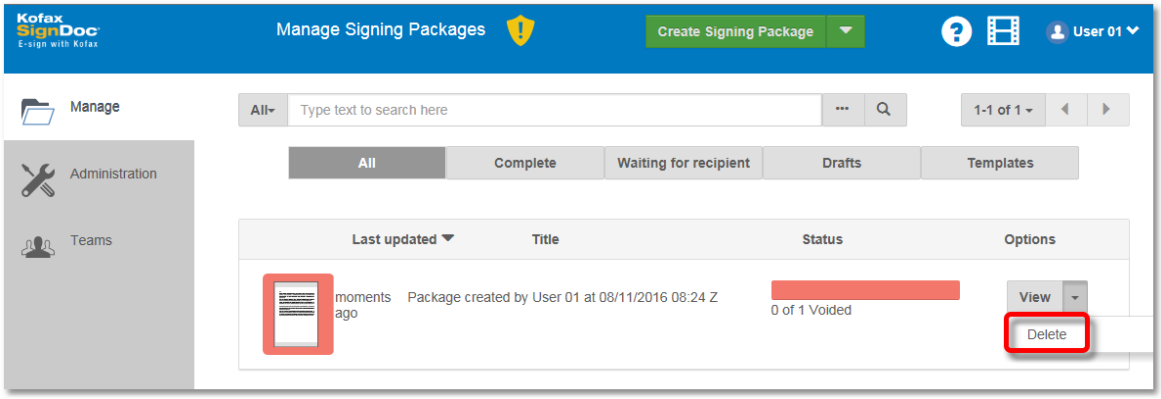


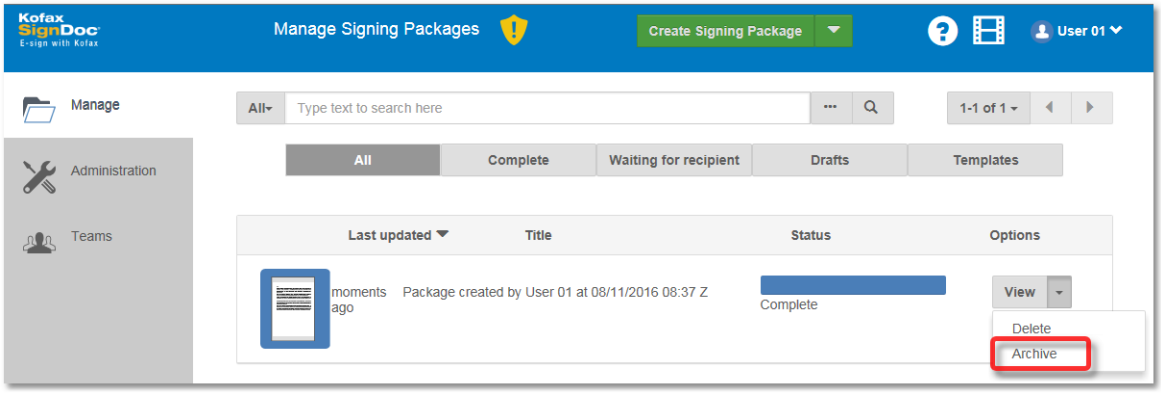
Delete

The sender of the Signing Package (Kofax SignDoc user) can delete a Signing Package when it is completed. A confirmation message box is shown. If the user confirms the signing package is removed from the system.



Archive

The sender of the Signing Package (Kofax SignDoc user) can archive a Signing Package when it is completed.

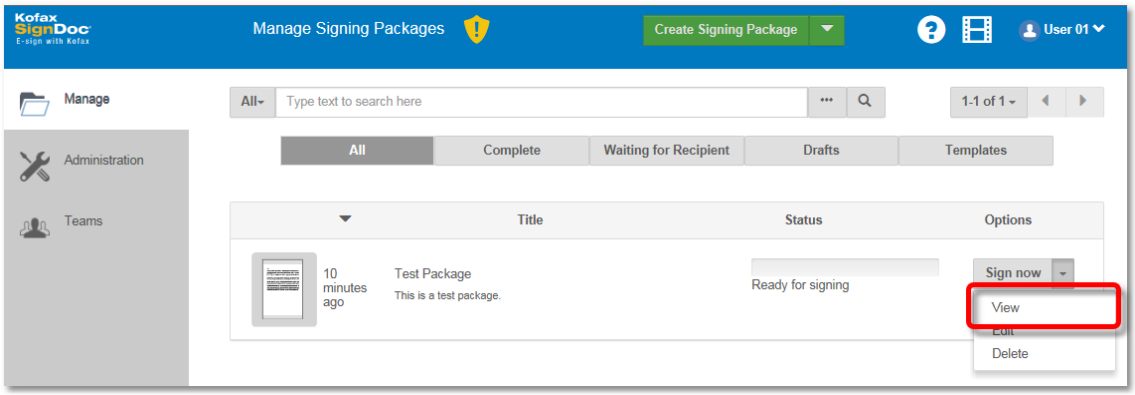


7.4 Resend a Signing Request

Sometimes a Kofax SignDoc user is requested to resend the Signing Package to recipients. A new email address of the recipient can be entered.

A user can resend a Signing Package to all or only to one recipient.

1. Select **View** of a Signing Package on the Overview manage page.



2. Select **View History**.

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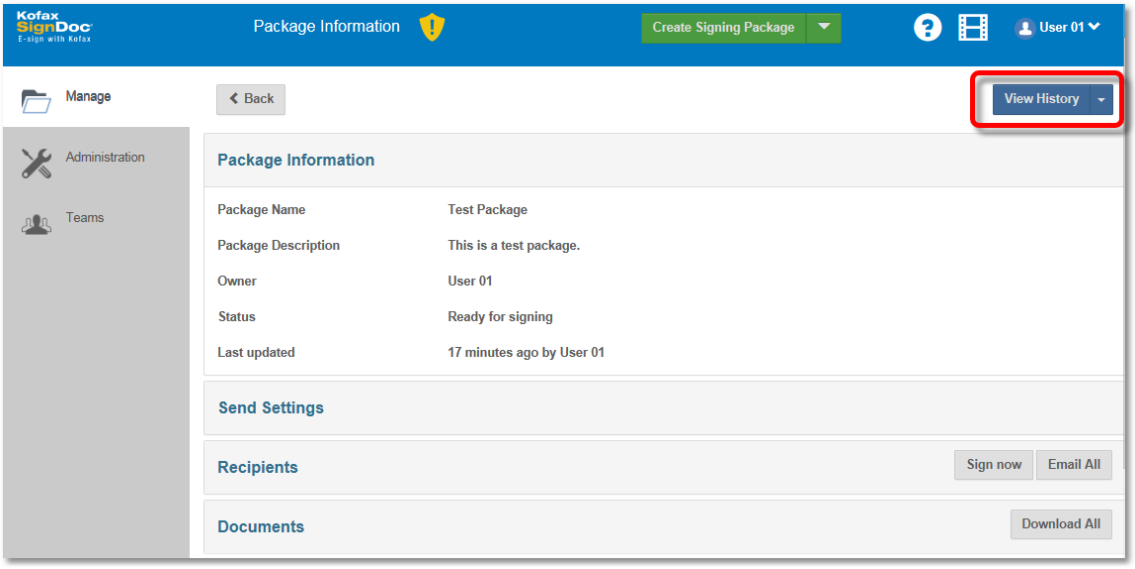
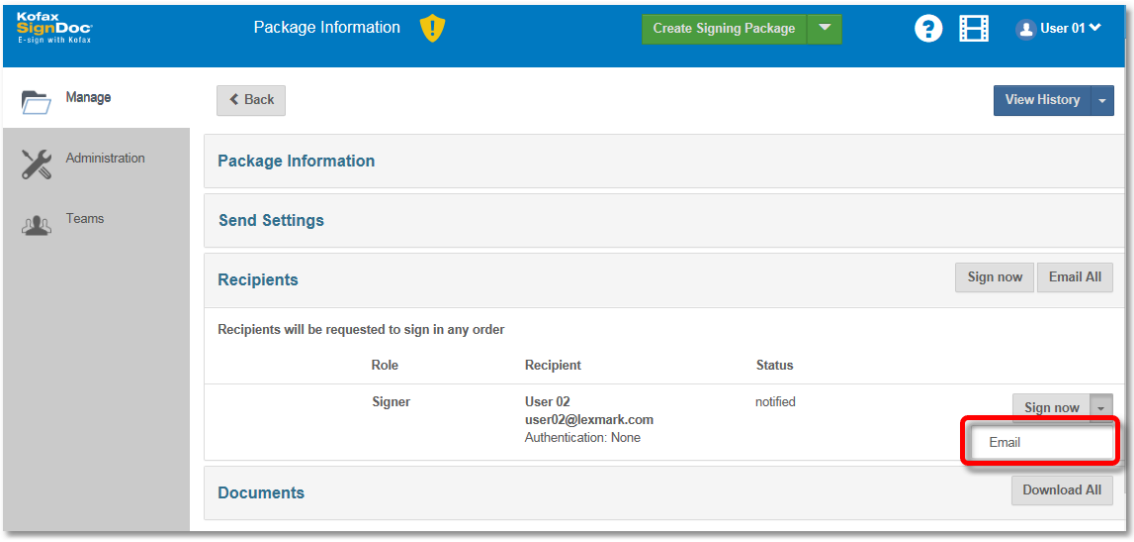
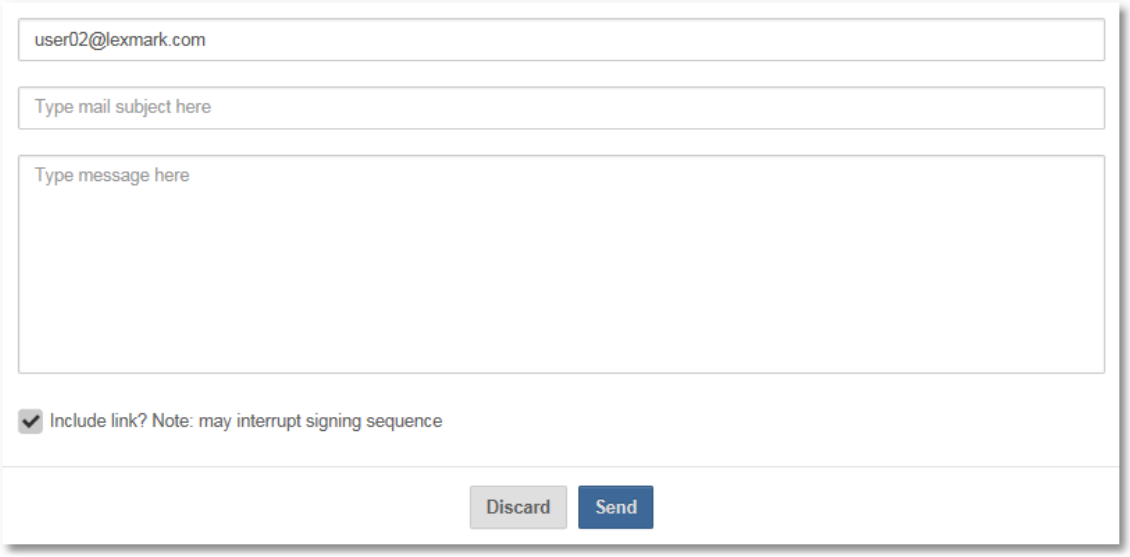


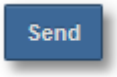
3. Go to section **Recipients** and click **Email** next to the recipient.



4. Type mail subject and body text (message to the recipient) and select the checkbox to include link for signing. An email address of the recipient can be entered, if no emails have been saved for the signer yet.



5. Confirm sending.



7.5 View History of Signing Package

For each Signing Package a **View History** page shows the current status of the Signing Package immediately the package was sent.

View History shows all actions during the Signing Package life cycle. This means it contains relevant actions/data created within the Kofax SignDoc. It contains information about

- the signing package
- the recipients of the signing package
- performed actions for accessing the signing package for each recipient
- performed actions for each document of the signing package in chronological order.

The audit trail of a Signing Package provides following information:

Package Information

Information	Description
Package Name	The name of Signing Package.
Package Description	The package description.

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Information	Description
Package id	The unique identifier for a package.
Creator	The user which created the signing package.
Date Time created	The date and time the Signing Package was created.
Status	Signing Package status when the audit trail was generated. • Started: The status is used when the start date has been reached but not all signers have been notified. • Completed The status is used when the Signing Package is completed by all recipients. • Rejected: The status is used when one recipient has declined the signing workflow. • Expired:The status is used when the time for signing the documents are outside the time limit. • Canceled: The status is used when a Kofax SignDoc user (not a recipient) has stopped processing of the Signing Package before it is expired. • Archived: The status is used when a Kofax SignDoc user moved the Signing Package to Archive.
eConsent Text	The eConsent text the signer has to agree to in order to be able to continue the signing process.
Date Time completed	The date and time the Signing Package was completed.

Recipients

Information	Description
Name	The name of the recipient.
Email	The email address of the recipient.
Role	The role of the recipient: either signer or reviewer.
Date Time Completed	The date and time the recipient has completed the required actions for package.
Status	The recipient status
Authentication	The used method for authentication.

Documents

Information	Information
id	The identifier for the document.
Name	The name of the document.
Description	The document description.

Audit Trail

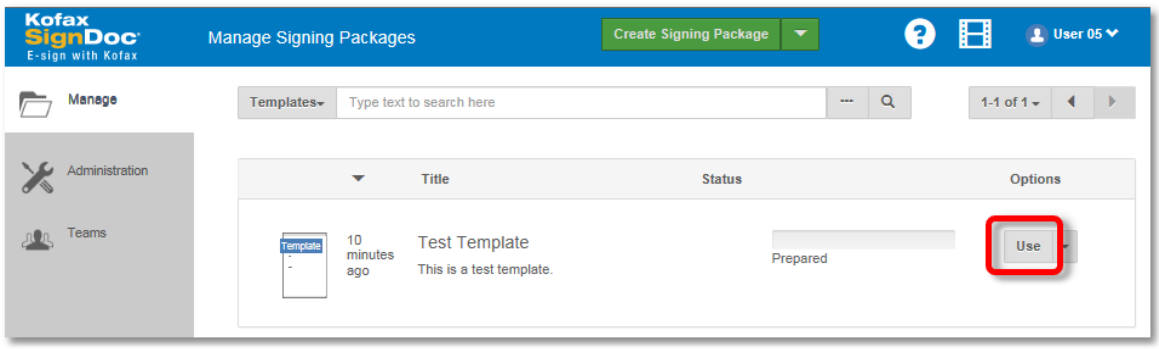
Information	Information
Date Time	The date and time the action was created.
Performed by	The name of the recipient performing the action.
Document	File name of the document.
Action	Description of the action performed.

7.6 Use a Template Package

A very fast method to create a Signing Package is the usage of an existing Template Package.

A Kofax SignDoc user

1. selects **Use** of a Template Package on the Overview manage page.



2. When the Create and Send Documents wizard is opened the Kofax SignDoc user
   a. changes only if needed
      - Signing Package name and description
      - recipient name and email address
   b. selects **Review & Send** in the wizard navigation bar

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c. clicks **Send**.

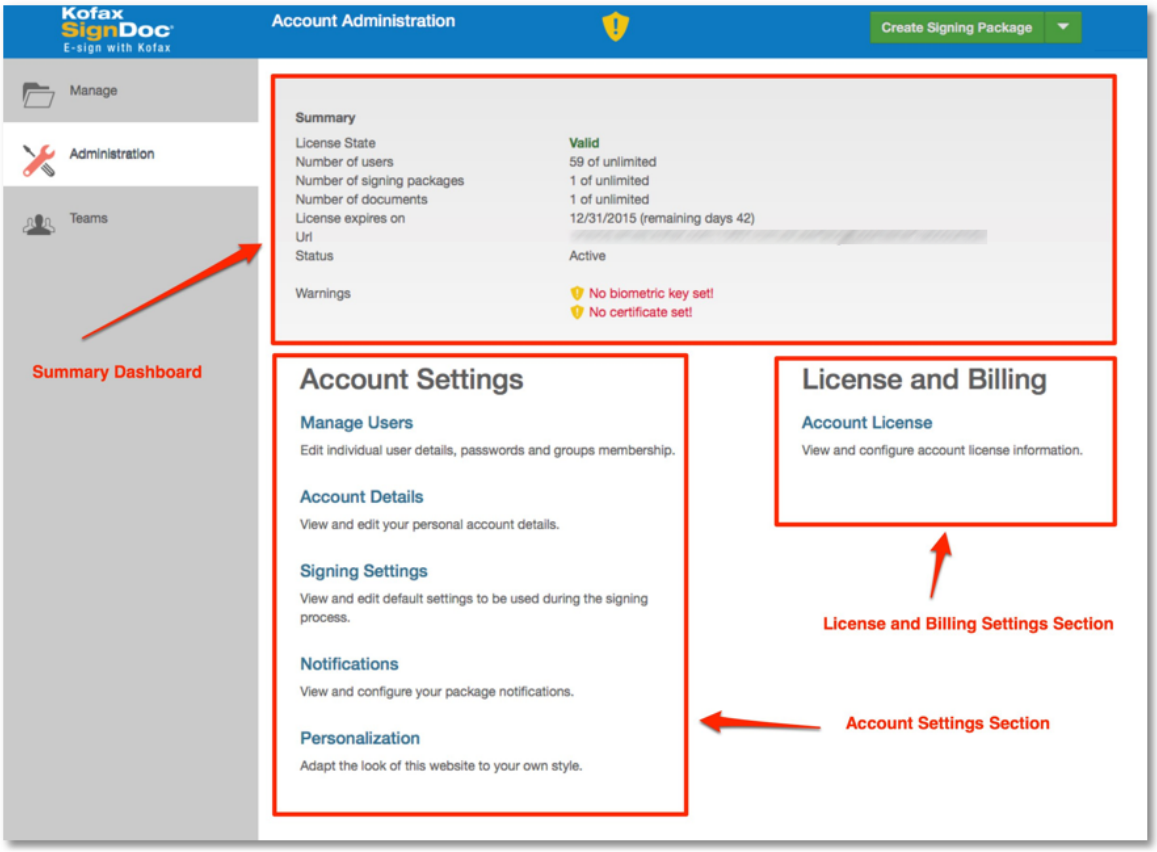
Alternatively, the user starts with selecting **Create Signing Package** from the header

and selects **Load from template** to open a pre-existing Template Package.

1. Type the name of the Template Package.
   The autocomplete search function will show available packages.
2. Select **Use** or press Enter.
3. Template Package is loaded.
   Selecting the template pre-fills the wizard in the consecutive steps with template information.
4. A blue soft prompt is shown "[Template Name] loaded".

8 Administrate Account

The Account Administration area is only available to users with the corresponding access rights.



Summary Dashboard

At the top of the page, a dashboard provides you with a summary overview of information that is relevant for the account. The following information is presented:

License State: specifies whether or not the currently installed license is valid.

Number of Users: displays both the number of users that have been created within this account, as well as the maximum number of users that are permitted for this account based on the current license.

Number of Signing Packages: displays both the number of signing packages that have been created within this account, as well as the maximum number of signing packages that are permitted for this account based on the current license.

Number of Documents: displays both the number of documents that have been added to signing packages within this account, as well as the maximum number of documents that are permitted for this account based on the current license.

License expires on: displays the date on which the current license will expire, as well as the number of days left before the expiry. Once the license is expired, the system can no longer be fully used.

Url: displays the URL for direct access to this specific Kofax SignDoc account.

Status: displays the status of this account. Specifically, it displays whether or not the account is active or has been suspended.

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Warnings: displays any warning messages that are important for the account administrator to be aware of.

Account Settings Section

Underneath the summary dashboard, you will find a section of links to settings pages that are specific to configuring the account settings for this account. The options include:

Manage Users: Edit individual user details, passwords and groups membership.

Account Details: View and edit your personal account details.

Signing Settings: View and edit default settings to be used during the signing process.

Notifications: View and configure your package notifications.

Personalization: Adapt the look of Kofax SignDoc to your own style.

Clicking on any of the blue links in the Account Settings section will lead you to a further page that will allow you to perform the configuration of a particular type of account settings.

License and Billing Section

Underneath the summary dashboard, you will find a section of links to settings pages that are specific to configuring licensing and billing options for this account. Currently, the only option available is the **Account License** option:

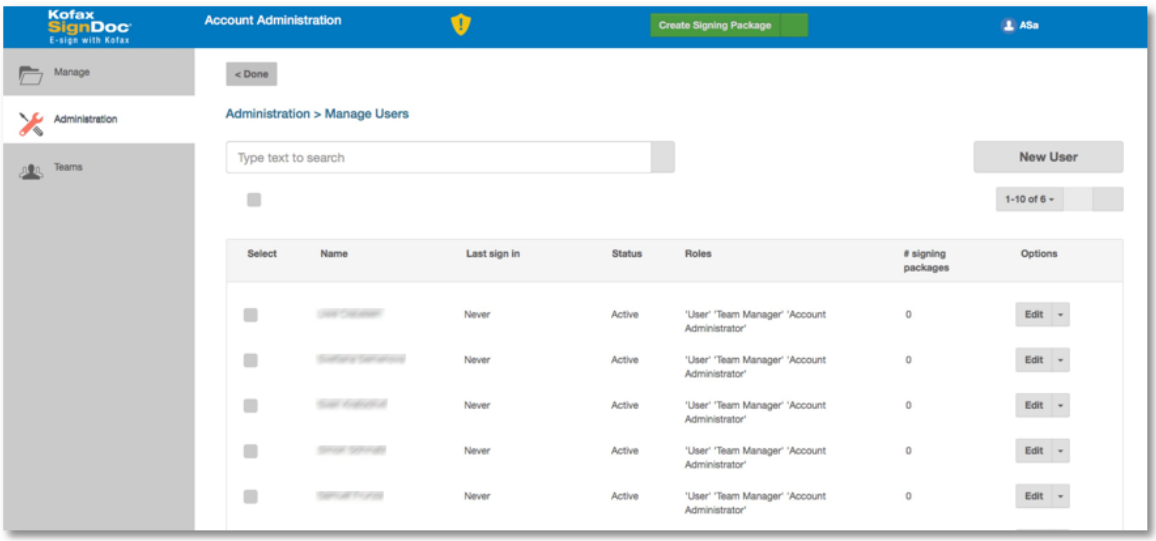
Account License: View and configure account license information.

8.1 Manage Users

The **Users** page of the **Administration** section provides an overview of users joining this account.

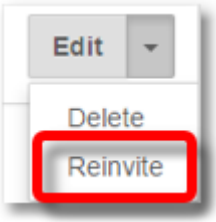
NOTE

This page is only available when the account is defined as multi-user account.



This page allows the account administrator to:

- Search for account users (account members)
  Type characters of the user name in the field and press enter. All users including the characters are listed.
- List of all members of the account
  All users of the account are listed in alphabetical order. The number of presented items per page is predefined (e.g. 10 users per page).
- Add new users to account
  A click on the button **New User** opens a page to invite a user to join the account.
- Edit individual users
  The account administrator can update name and email address of the user, reset password, assign new roles to the user or delete the user from the account.
- Delete users
  Performing this action deletes the user's access data and blocks the user from accessing the account.
- Suspend users
  Performing this action blocks the user from accessing this account. The user cannot log in, but be reactivated with the same credentials.
- Re-activate users
  After suspending a user an account administrator can restore the account membership at any time. Once restored the user can sign in and access Kofax SignDoc functionality.
- Reinvite users
  An account administrator is now able to reinvite an already invited user e.g. if the original email got lost. For this purpose a new action **Reinvite** is added to the drop menu of each invited user in the **Manage Users** page. He can do this as often as he wants until the user has become active. This happens when the user provides a password for the first time. Reinviting a user will invalidate all invitations previously sent.



8.2 Invite a User

1. On the **Account Administration** page click **New User**.

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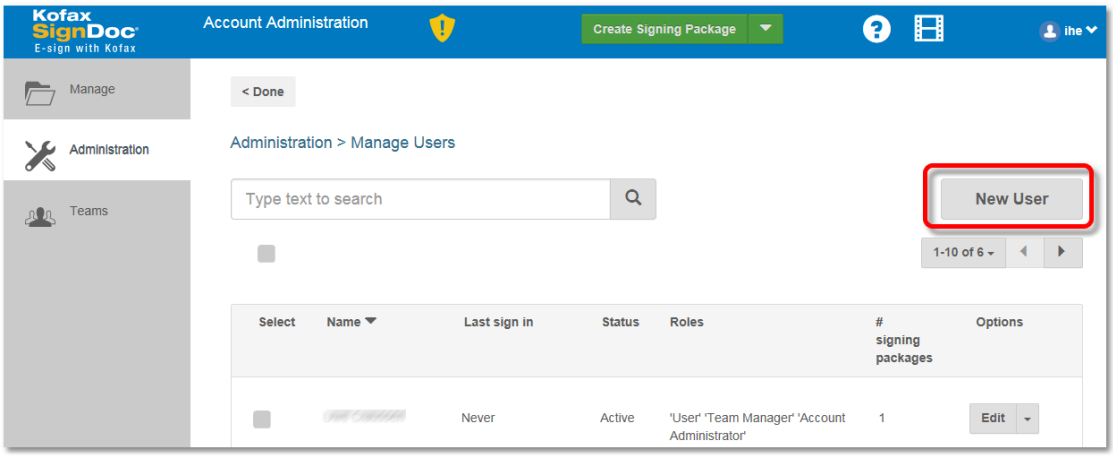
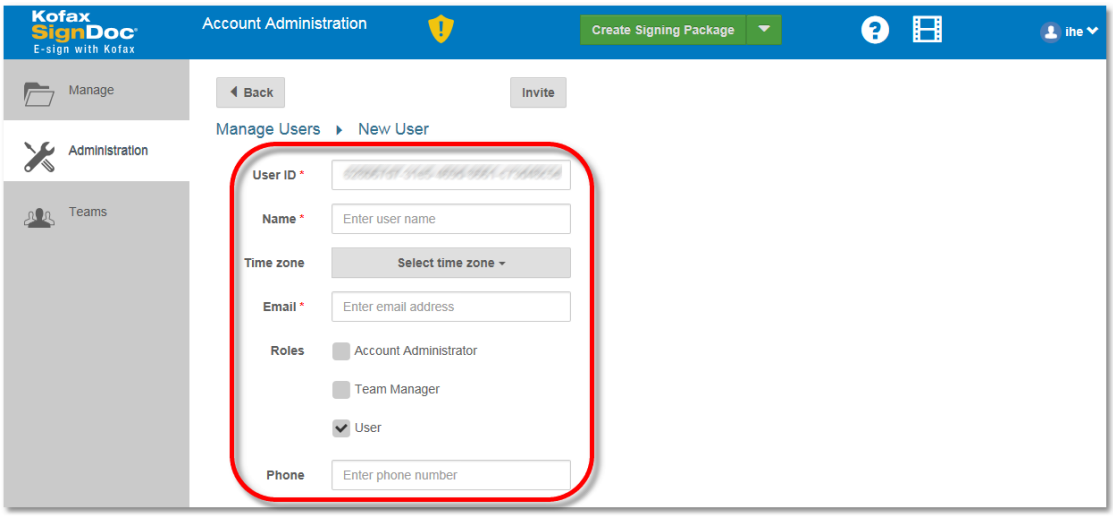
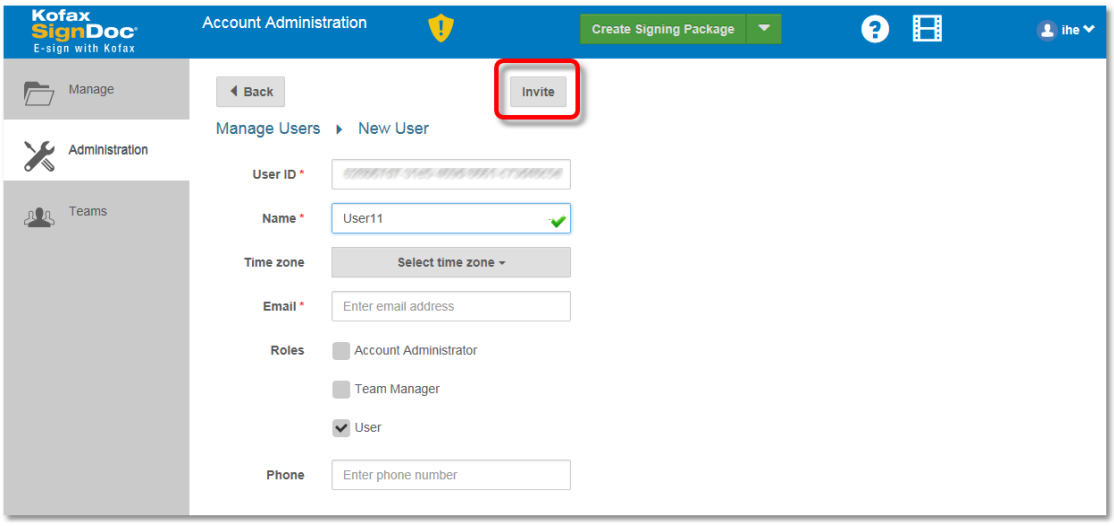


2. Enter the fields requested for creating the new user and assign one of the following roles:
   - Account Admin
   - Team Manager
   - User

   The administrator may select a time zone for the user.



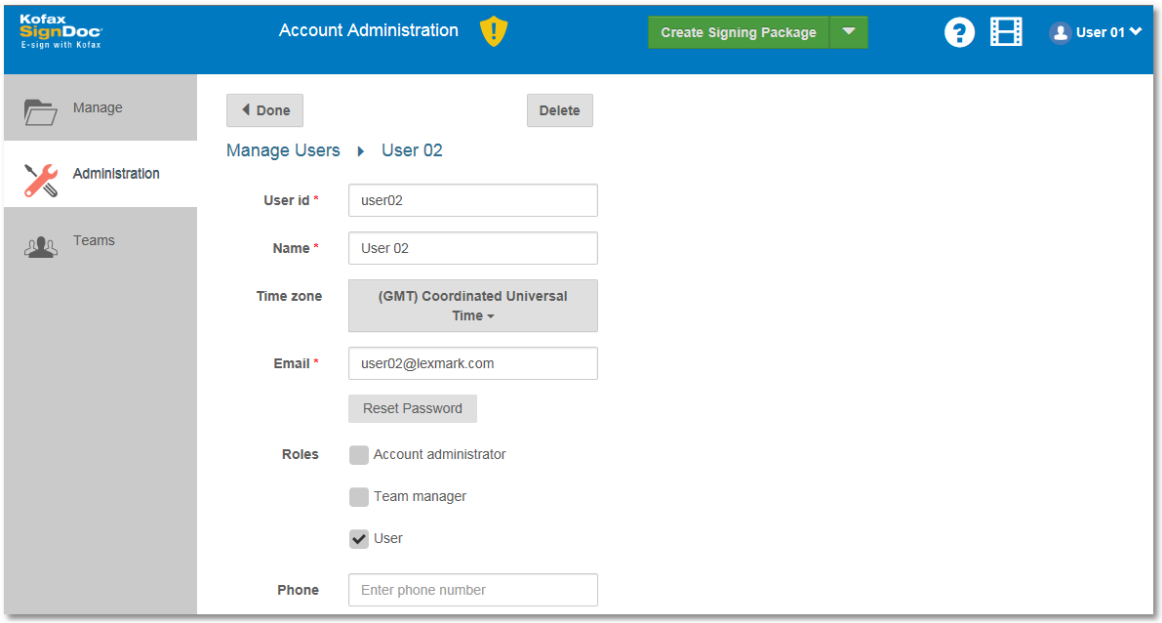
3. Click the **Invite** button.



4. The new user has to accept the received invitation email.
5. The invited user must provide a password. After the password is available the account will be created for the new user.

8.3 Update User Permissions

The account administrator can update name and email address of the user, reset password, or delete the user from the account as well as assigns role(s) to user.



Name & Email

The name of the user how it is displayed and the address where notifications via email are sent to for this user. Kofax SignDoc checks if the email address is already used within the application. A soft prompt appears when the email address is already in use.

NOTE

The email address is used as one unique identifier for the user.

Reset password

The administrator can request from the user to reset the password. The user will receive an email with a link to password change page.

Roles

In this section the administrator assigns roles to users of the account. When selecting a role all inherent roles are automatically assigned to this user (enabled grey check boxes).

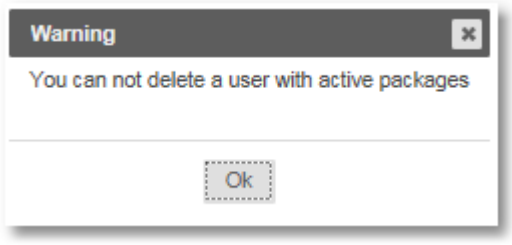
A user with the role account administrator has the same privileges like a Kofax SignDoc user with the role team manager. The administration of team roles and configurations of team settings is assigned to a user with the role team manager.

A user with role team manager can add users and remove team members, change settings, delete the team.

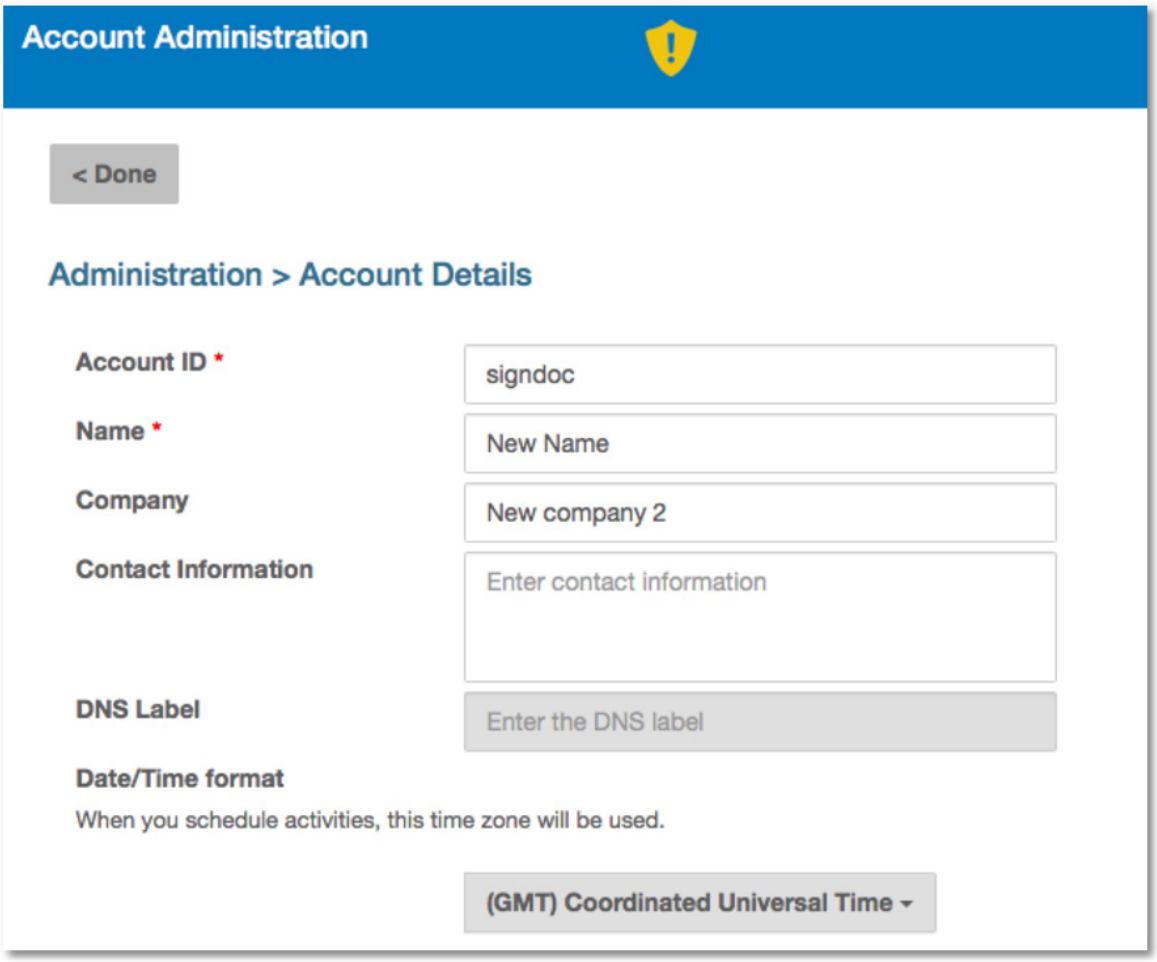
Controls

Button	Description
Done	Button returns the user to the Account administration page back.
Delete	Button to block the user to access the account.

Before a user will be blocked for Kofax SignDoc checks if the user has active packages. If yes, an information appears.



8.4 Account Details



On the **Account Details** page you can set specific attributes to be used for the account. They are as follows:

Account ID: This is a mandatory field that is used to identify your specific account. The account id may be requested from users of your account during login to the system and differentiates your account from other tenants that may be active in this Kofax SignDoc installation. The Account ID must be unique system-wide.

Name: This is the name to be used throughout the system for your account. This field is mandatory.

Company: This is an optional field identifying the name of the company to which this account belongs.

Contact Information: This is an optional field describing the contact information for this account.

DNS Label: This label allows this Kofax SignDoc account to be accessible via a subdomain. E.g. If your company's account should be accessible via the url yourcompany.kofax-signdoc.com, the label "yourcompany" will appear in the DNS label field. This field is configured upon creation of this account by the system administrator and is not editable.

Date/Time format: A drop down box is provided to allow you to select the time zone to be used for all timestamps during signing, as well as for any time and/or date indications within the application.

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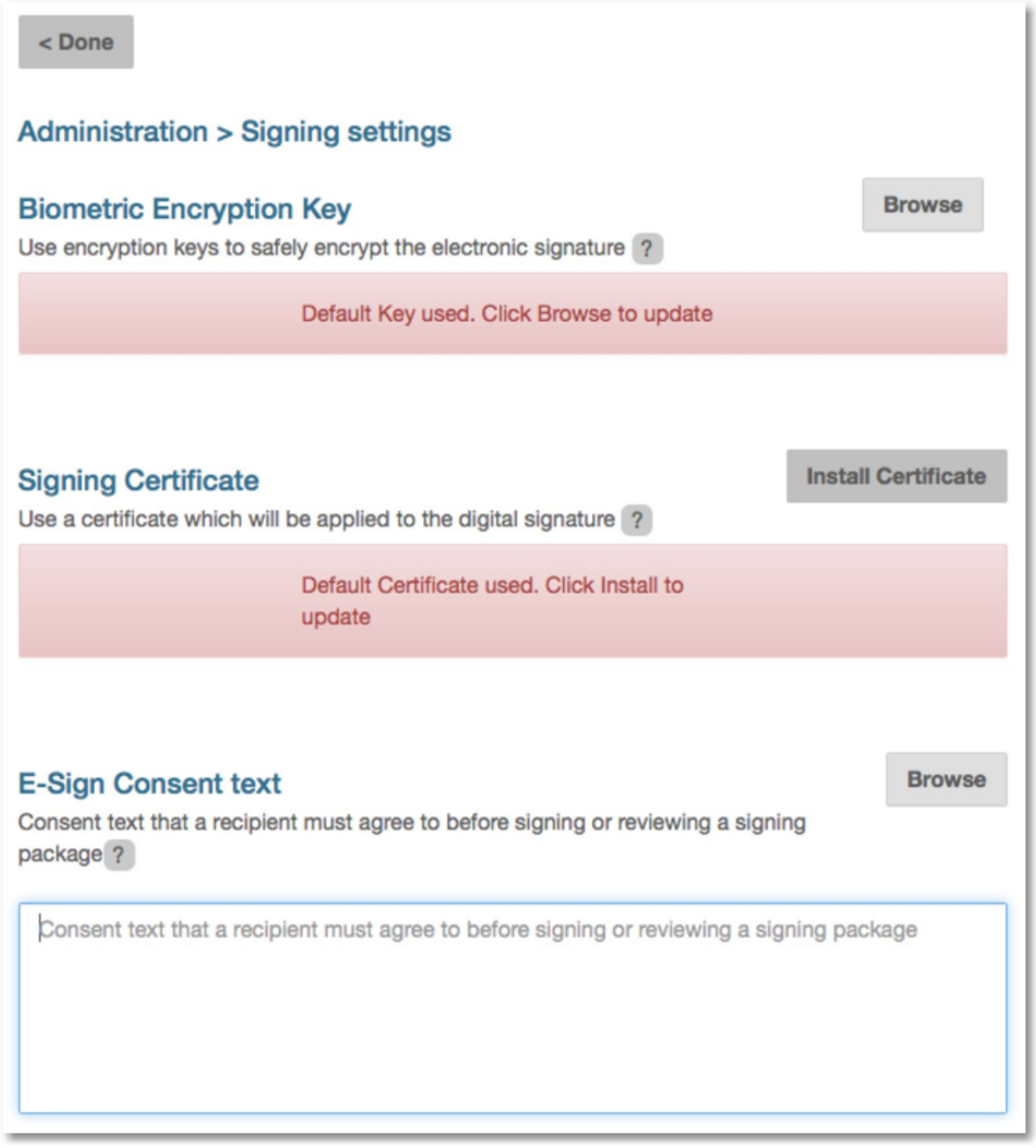
8.5 Signing Settings

The **Signing Settings** allow an administrator to set preferences and configurations for this account that are specific to the actual signing of documents.

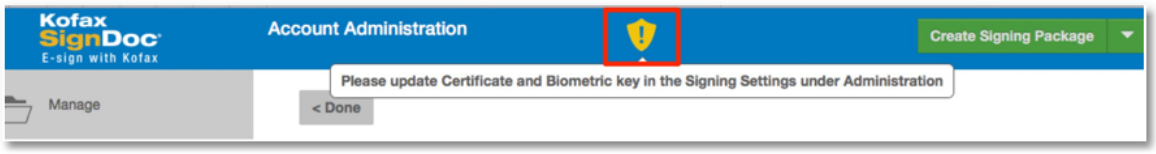


Biometric Encryption Key

This is the encryption key that will be used to encrypt biometric signature data whenever it is captured during the signing process. Generally, such data is only captured when using specific hardware signature tablets during the signature capture process. Ideally, you should upload the

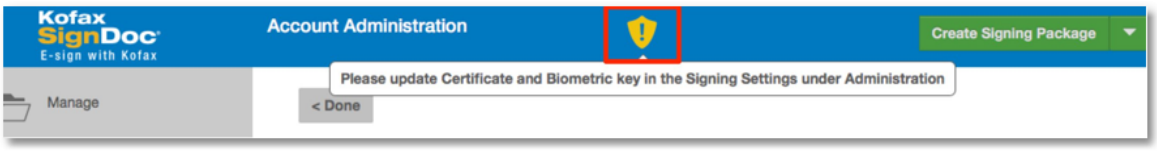
public key for your company here, and take all precautions to put the private key in safekeeping. This will allow you to encrypt signature data such that only the person with access to the private key will be able to decrypt it at a later time (if necessary). In order to upload the public key, you must click on the **Browse** button and select the public key file from your local computer.

If no biometric key is set here, a default biometric key will be used, and a warning will appear at the top of each Kofax SignDoc page instructing the administrator to update the biometric key.



Signing Certificate

This is the digital signing certificate that will be used for each Kofax SignDoc signature placed in a document. By clicking on the **Install Certificate** you will be provided with a dialog that will allow you to browse the local computer's file system in order to select and upload the digital certificate. Once uploaded, the selected certificate will be used for all signing ceremonies. The possibility to select your own signing certificate allows an administrator to ensure that a certificate's credentials match the account holder's. This is particularly important for the final signed documents. When inspecting signed documents, the certificate selected here will be displayed and the document will be shown as having been signed by the owner of the certificate. If no certificate is selected, a default self-signed certificate will be used, and a warning will appear at the top of each Kofax SignDoc page instructing the administrator to update the signing certificate.



E-sign Consent Text

The e-sign consent text is the text that will be displayed to each recipient of a signing package before signing. The recipient will be asked to acknowledge their agreement with this text before being permitted to continue the signing process. It is important that the text provided here represents you, or your company's legal terms and conditions concerning electronic signing of documents. A default text is provided which the account administrator must modify here. Kofax takes no responsibility for documents signed using the default text. The text is provided as-is and must be modified before using SignDoc.

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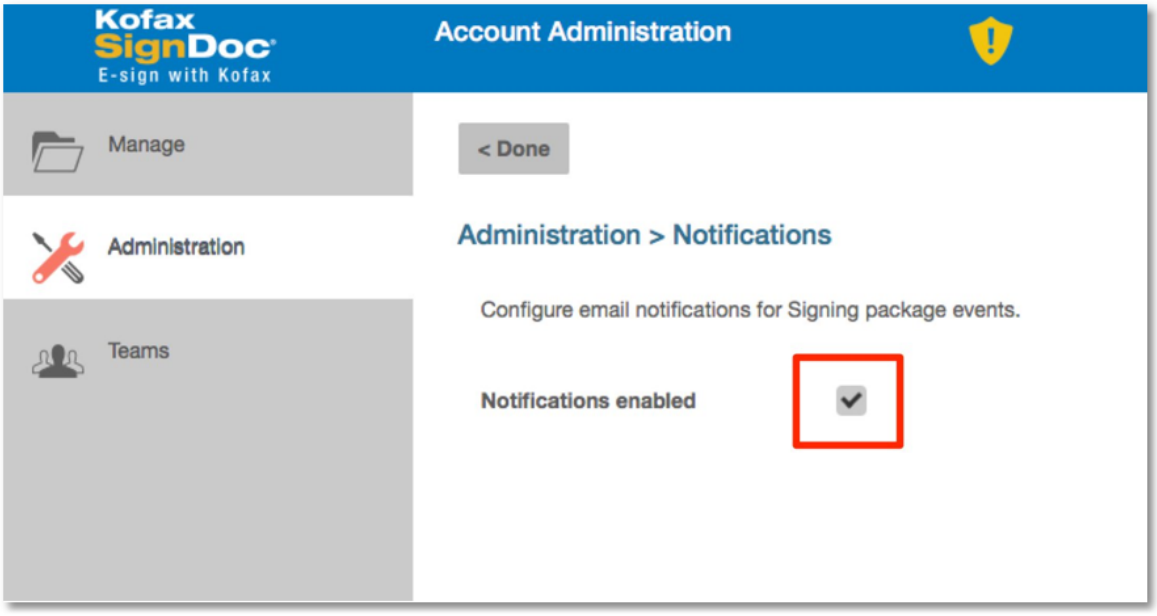
8.6 Notifications



The **Notifications** settings page allows an administrator to specify whether or not email notifications should be sent to users upon event changes e.g. to notify a user that a recipient has signed a document. Notifications are enabled or disabled for the entire account by checking or unchecking the checkbox on this page.

8.7 Personalize an Account

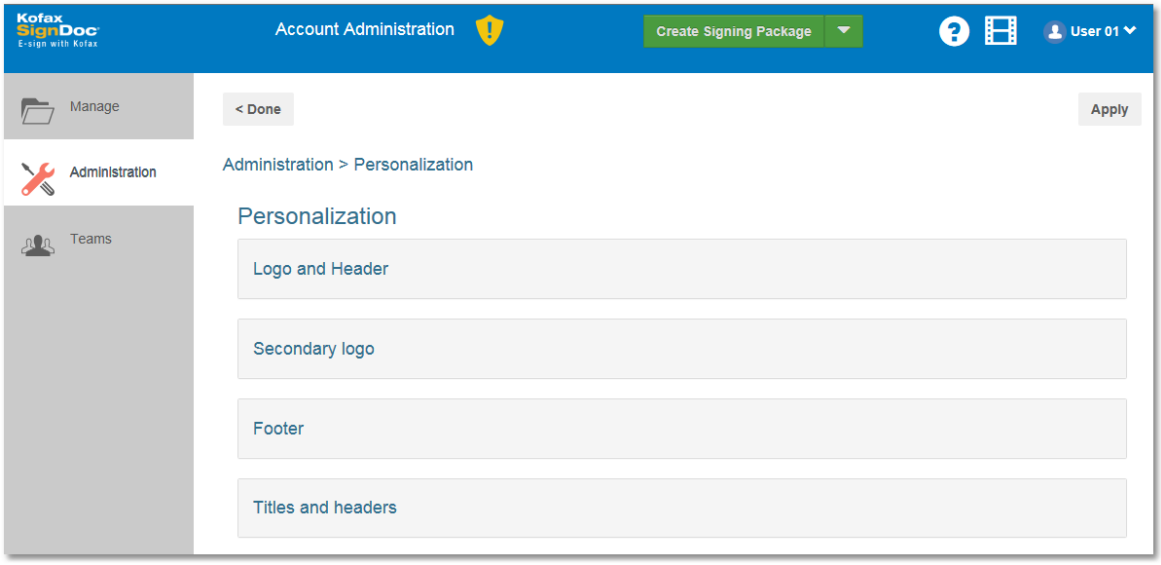
You can personalize the account to allow users identify the account owners organization.

The personalization is visible to both the package owners and signing package recipient. Using the personalization options you can set colors, logos, and links in the footer.

Personalization Page

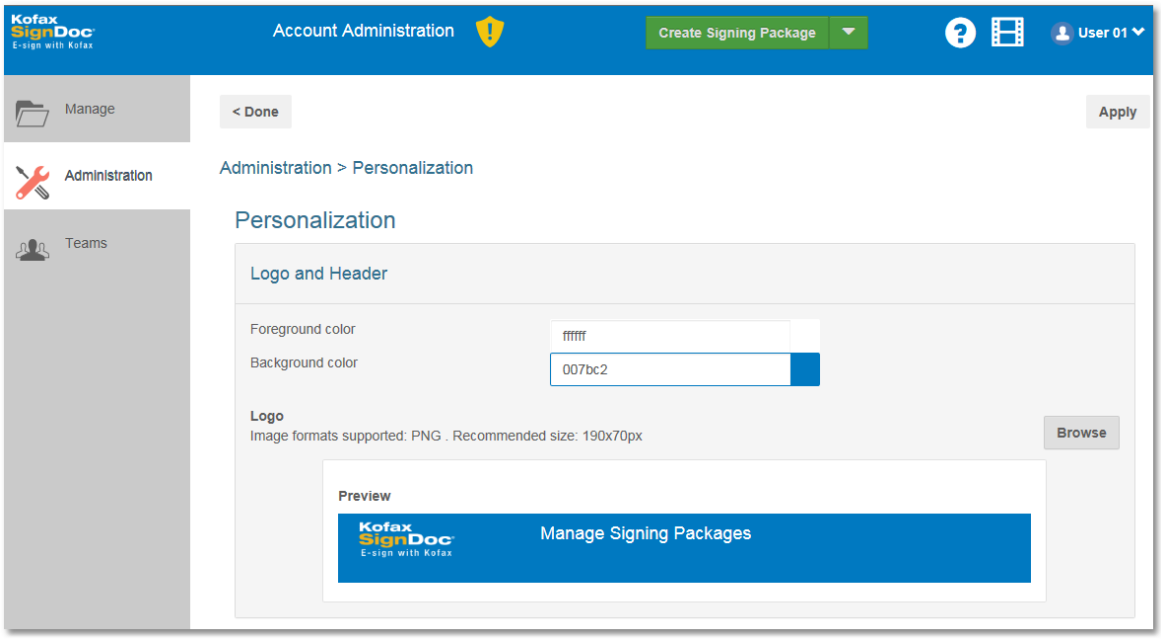
To personalize the account you need to login with a user with account administrator privileges.

Administration > Personalization



The Personalization page is divided into several section, each section relates to a group or region of a page. Each section has a preview area to confirm the changes are as you expect it. After an adjustment has been made click the **Apply** button to view the results. When you are finished click the **Done** button to return to the account administration dashboard.

Logo and Header



You can personalize the appearance of the header in the following locations:

- Kofax SignDoc main pages; Manage Packages, Teams, Account Administration, Prepare Package etc.
- The Signing wizard

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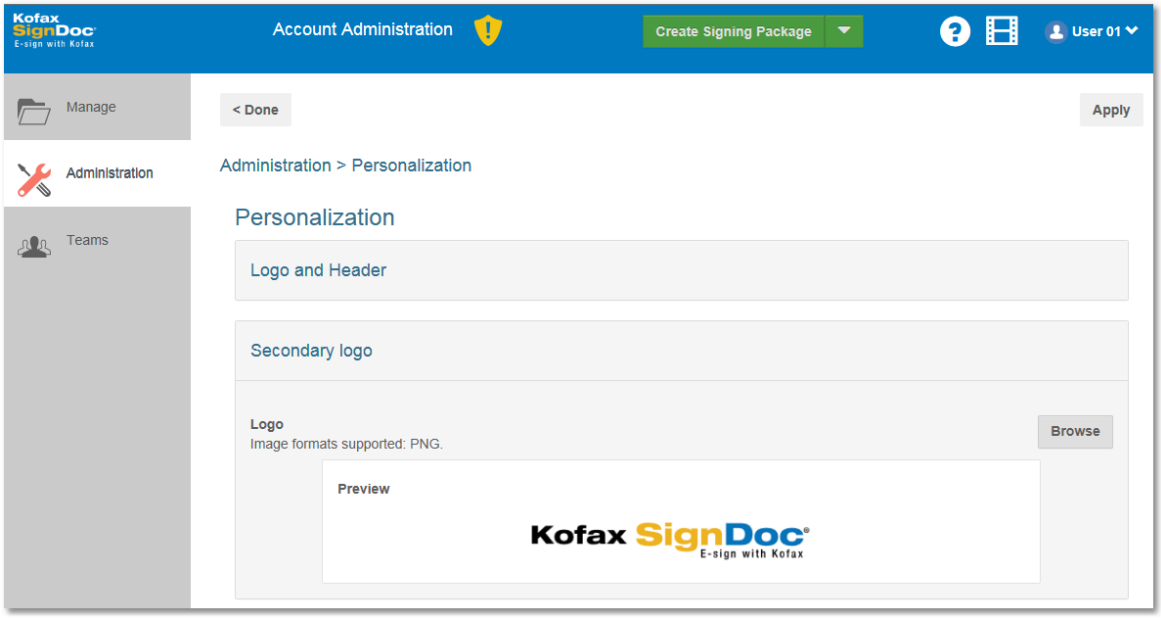
- Emails

Foreground and Background color can be customized. Type the hexadecimal RGB code or click the color to select from the color palette.

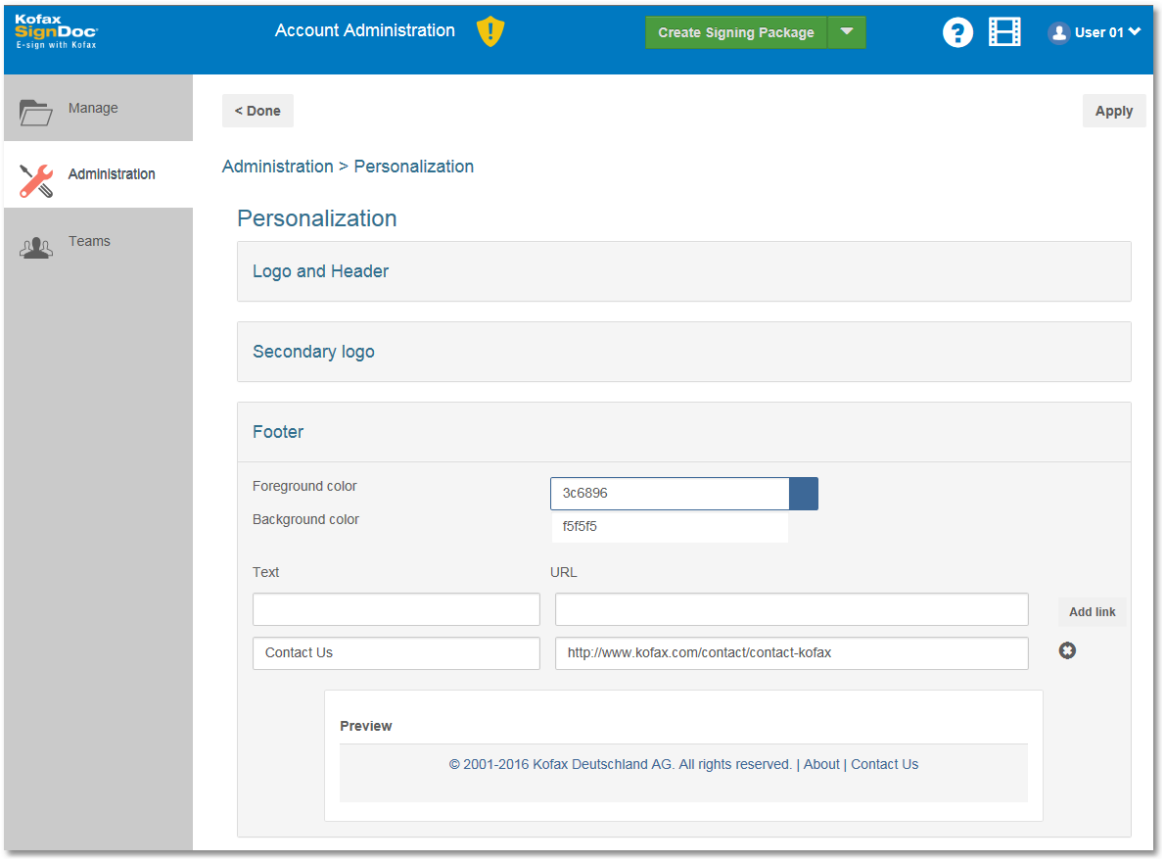
To change the logo click the browse button and locate the desired image.

Secondary Logo



You can change the logo of the login screen here. To change the logo click the browse and locate the desired image.

Footer



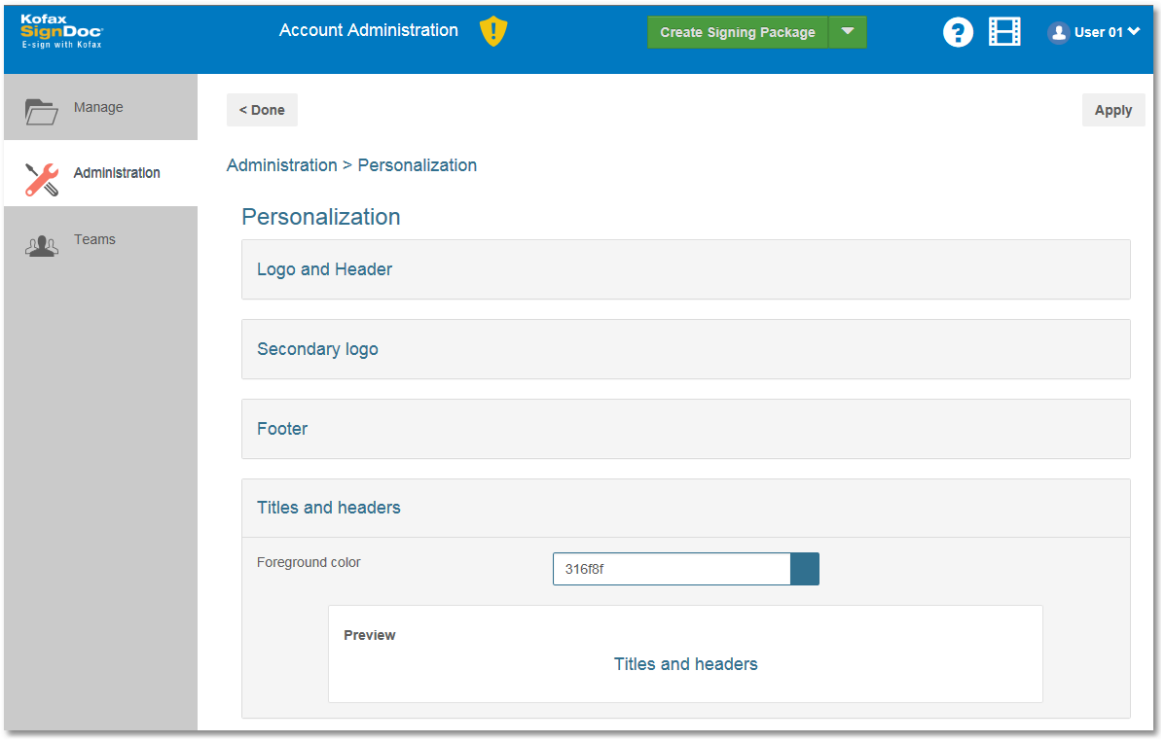
The footer can be customized for all account pages. This includes:

- Kofax SignDoc main pages; Manage Packages, Teams, Account Administration, Prepare Package etc.
- The Signing wizard

Foreground and Background color can be customized. Type the hexadecimal RGB code or click the color to select from the color palette.

The links in the footer can also be changed. Click the **Add link** button to create a new link in the footer. Type the Text and Url. Multiple links can be added by clicking the **Add link** button again.

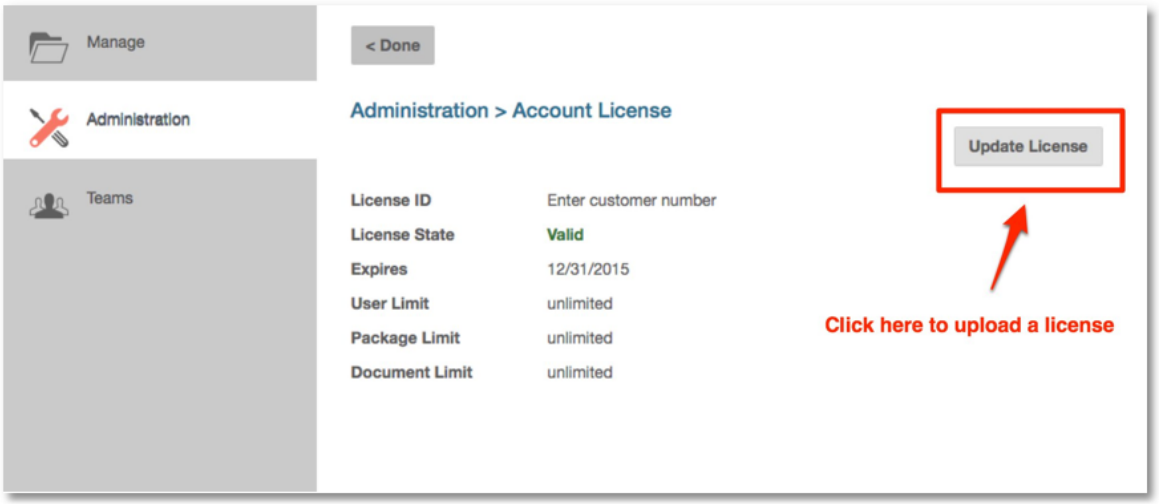
Titles and Header



Titles and headers in various locations within Kofax SignDoc can be changed.

Text color can be customized. Type the hexadecimal RGB code or click the color to select from the color palette.

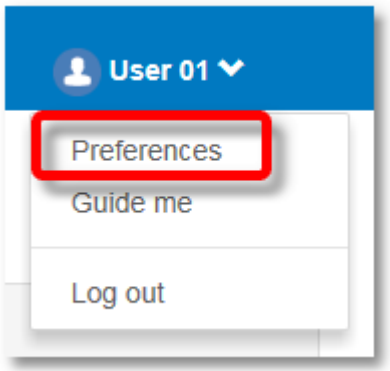
8.8 Account License



The **Account License** settings page provides an overview of the current license metrics, as well as an option to upload a new license (e.g. to renew, prolong, or upgrade the current account). To set a new license, click on the **Update License** button. A file browser will open that will allow you to load the Kofax SignDoc license file from your local computer's file system.

9 User Preferences

The preferences page shows settings which can be changed by each user. In the Kofax SignDoc header click the drop down icon next to the user account icon or name and select **Preferences**.



The preference page is displayed.

NOTE

User preferences are not available from a Wizard page.

Available preferences depend on the permission settings for the account.

User preferences include following topics:

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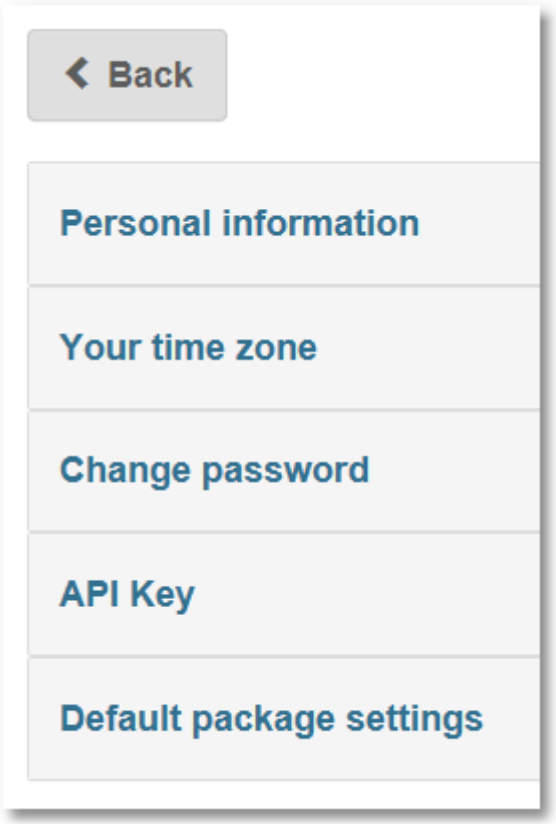


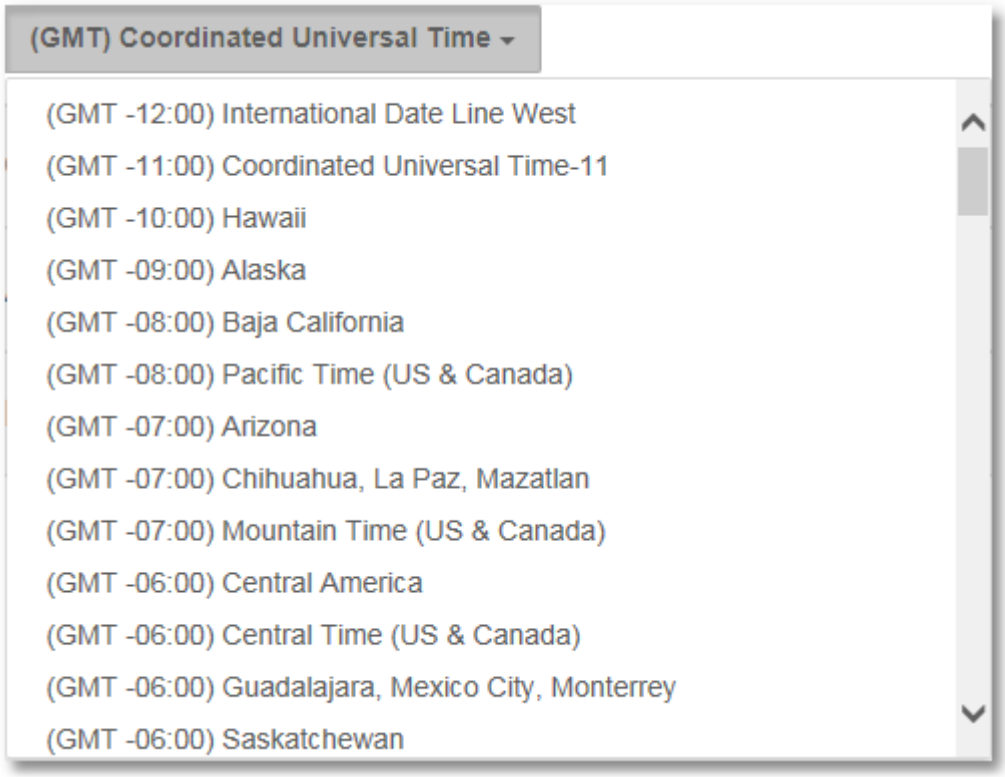
The **Back** button will return the user to the page from where he started opening preferences.

Personal information (readonly)

This section lists the name of the user, the email address, the assigned roles within and the membership in Teams.

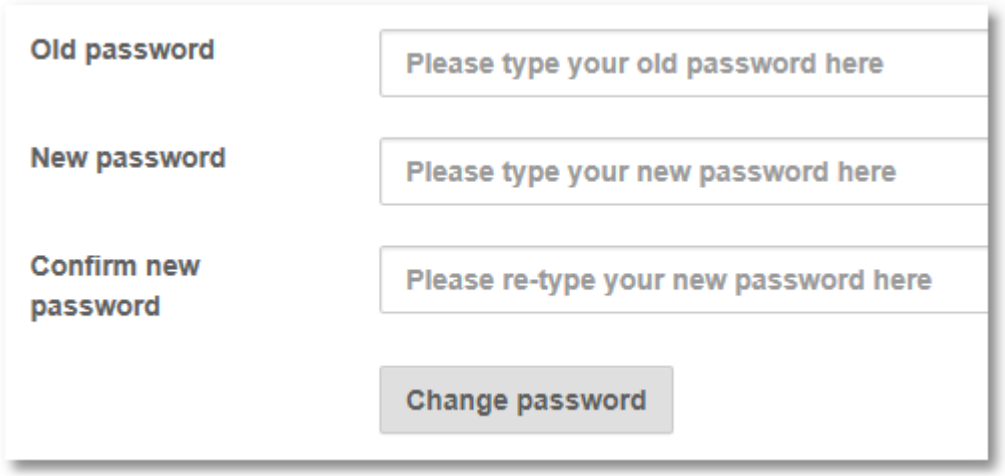
Your time zone

This setting allows the selection of a time zone. See Time Zone Information for detailed information. The user may select another time zone if desired.



Option to change password

If permitted by settings of the application the user can change his password for Kofax SignDoc.



The user enters the requested information and clicks on **Change password**. A password must be at least 6 characters long. The system will update the password and notifies the user.

API Key for headless interacting with Kofax SignDoc (readonly)

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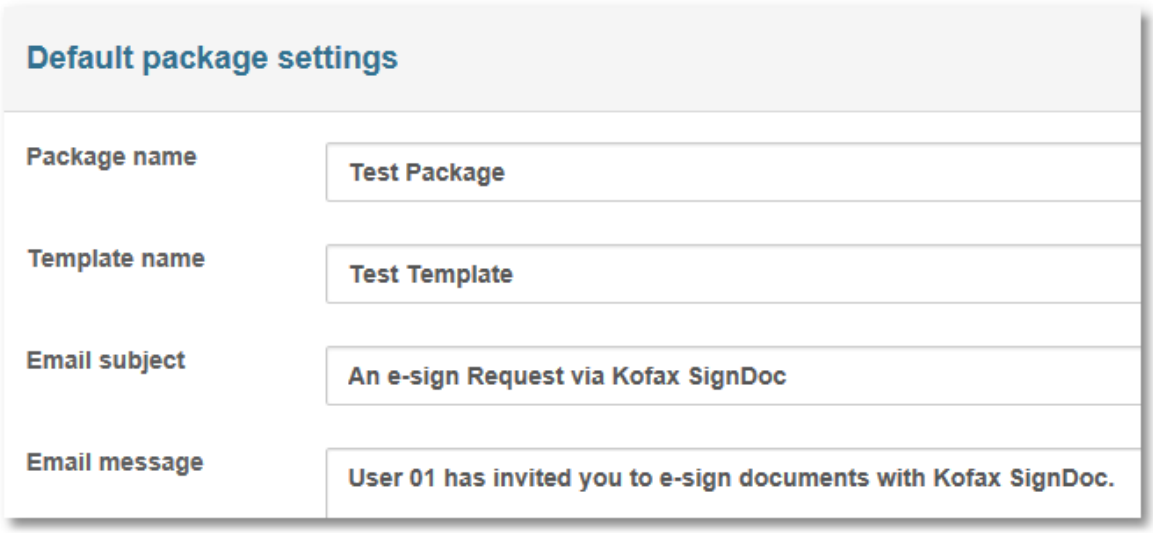
Kofax SignDoc REST API can be consumed by any programming language able to do so. It requires nothing more than an API key for authentication to enable a user to interact with Kofax SignDoc in a headless manner.

Default package settings

Here a user can change the default name of a Signing Package or a Template when created or enter his default Email subject and message to recipients. All these settings can be updated also during the Signing Package creation process.



10 Work in Teams

Kofax SignDoc offers that work can be organized in teams. This allows a group of users to be responsible for a certain set of packages.

Kofax SignDoc enables account administrators to create teams and to assign users as **Team Manager**.

A team consists of users joining the same Kofax SignDoc account. Users with Team Manager role can add users to their teams. A team can have more than one users with the role team manager. Changes of the team or modifications in the team settings are accepted from each user with the role team manager. This section is only available if a user has the corresponding permissions.

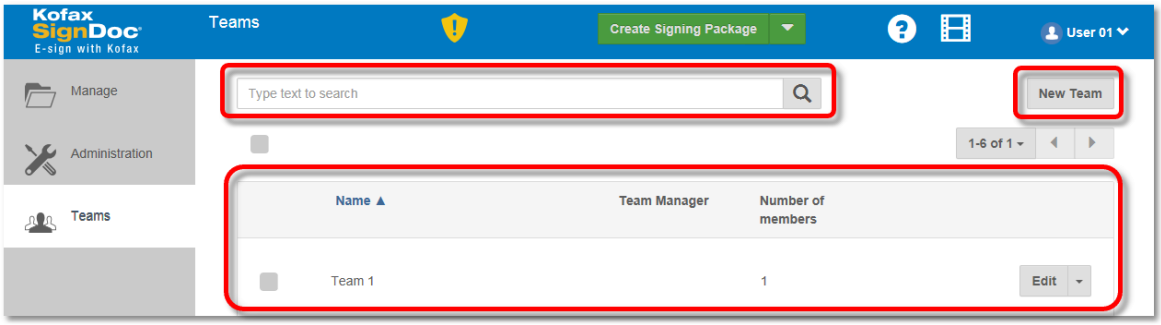
A user can be a member of various teams. Kofax SignDoc lists for users their membership in the user preference page.

Every team member can follow up with Signing Packages of his team – a team member can continue creation of Signing Packages available for his team. That means each team member can view, edit and process packages available for the team.

If a user has the role account administrator or team manager the user can administrate the team via **Teams** page. The teams page displays information about users associated with this account.

NOTE

A team can have multiple team managers.



This page allows the team manager to:

- search for teams
  Type characters of the team name in the field and press enter. All teams including the characters are listed.
- list all teams of the account
  All teams of the account are listed in alphabetical order. The number of presented items per page is predefined (e.g. 10 users per page).
- add new teams to account
  A click on the button **New Team** opens a page to create a new team.
- delete teams
  Performing this action deletes the team. Packages are assigned to the user who performed an action on it. Deleting a team does not delete a user.

10.1 Create a Team

NOTE

This functionality is only available when the accessing Kofax SignDoc user has the role account administrator.

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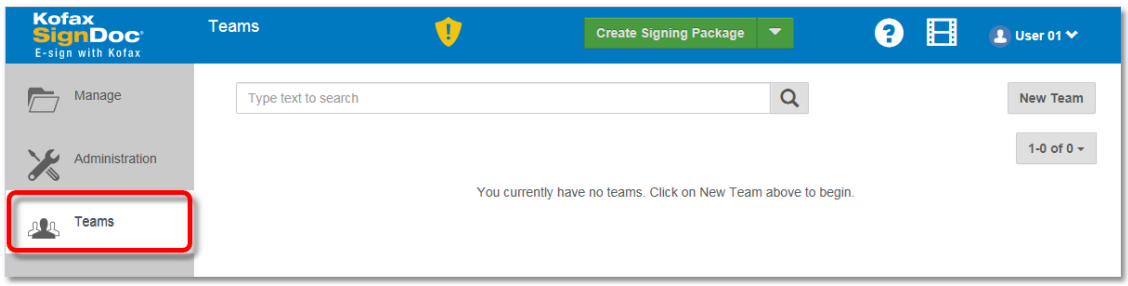
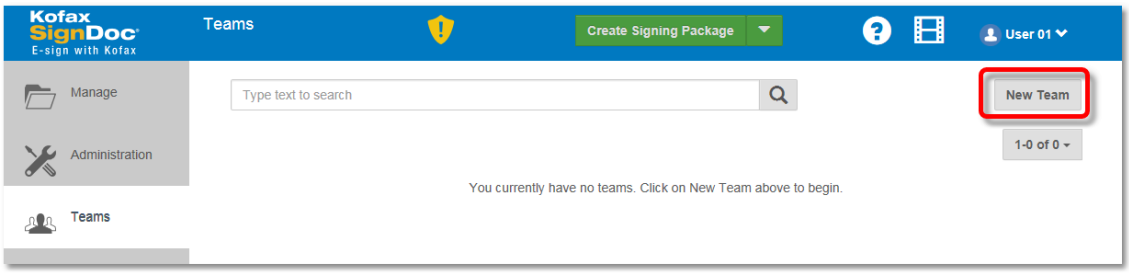
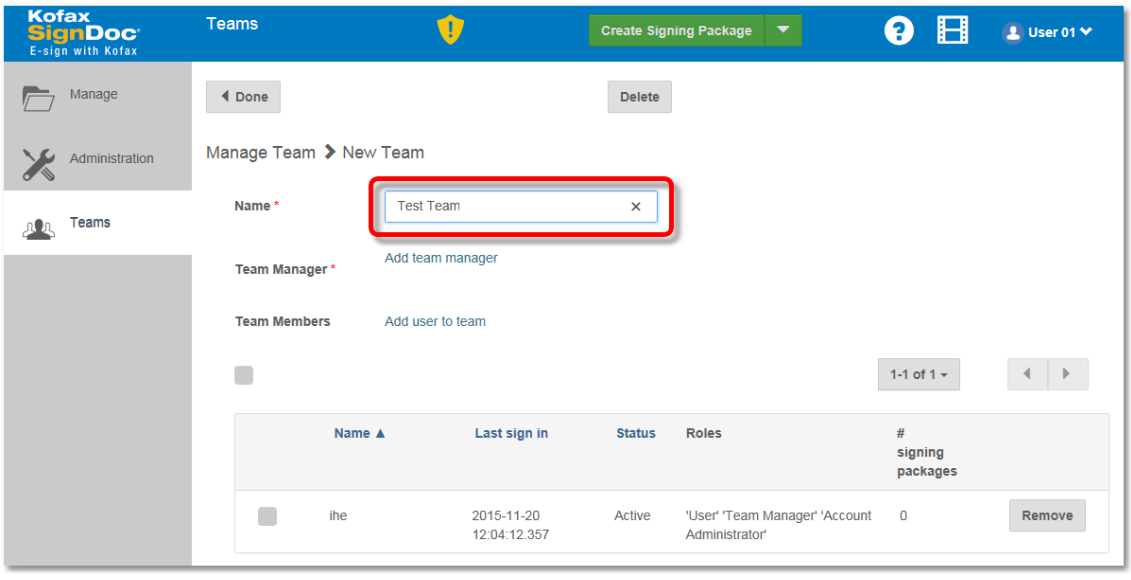
1. Go to the **Teams** panel on the left hand navigation side.



2. Click the button **New Team**.



3. Type Team Name.

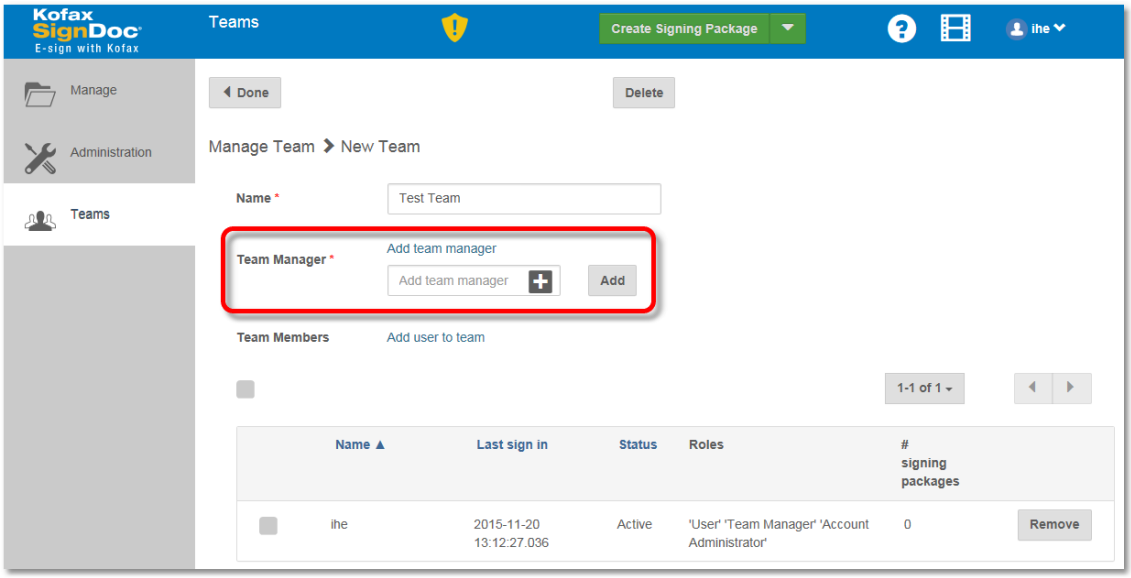


NOTE

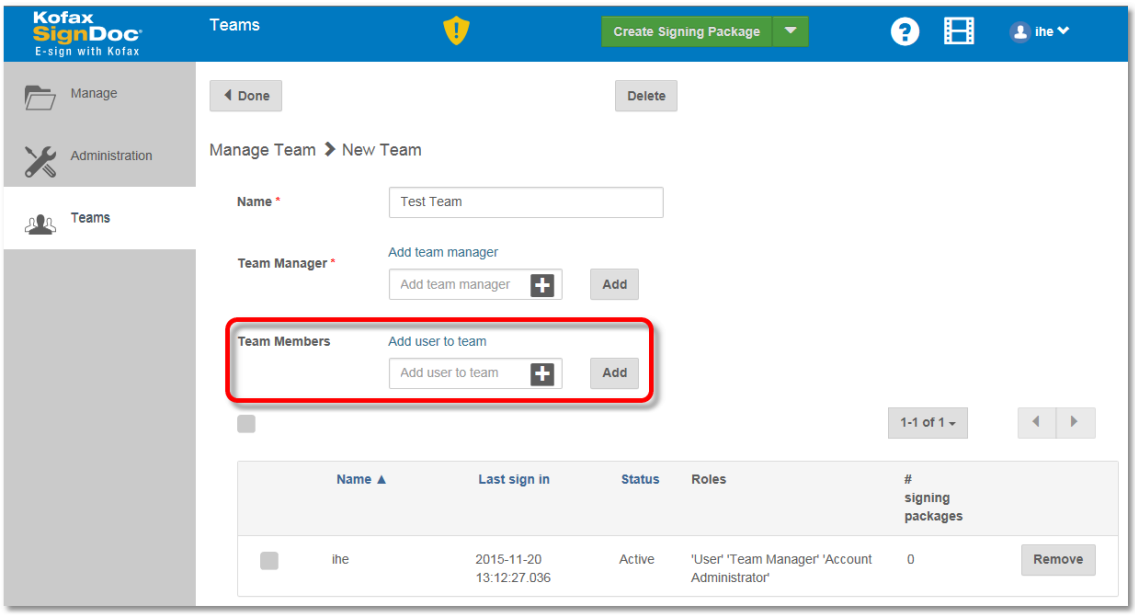
The team name can be changed whenever the team is edited.

4. Optional: Define a new Team Manager. The account administrator creating the team is set as default.

a. Add a Kofax SignDoc user as team manager.



5. Optional: Add a Kofax SignDoc user as team member.



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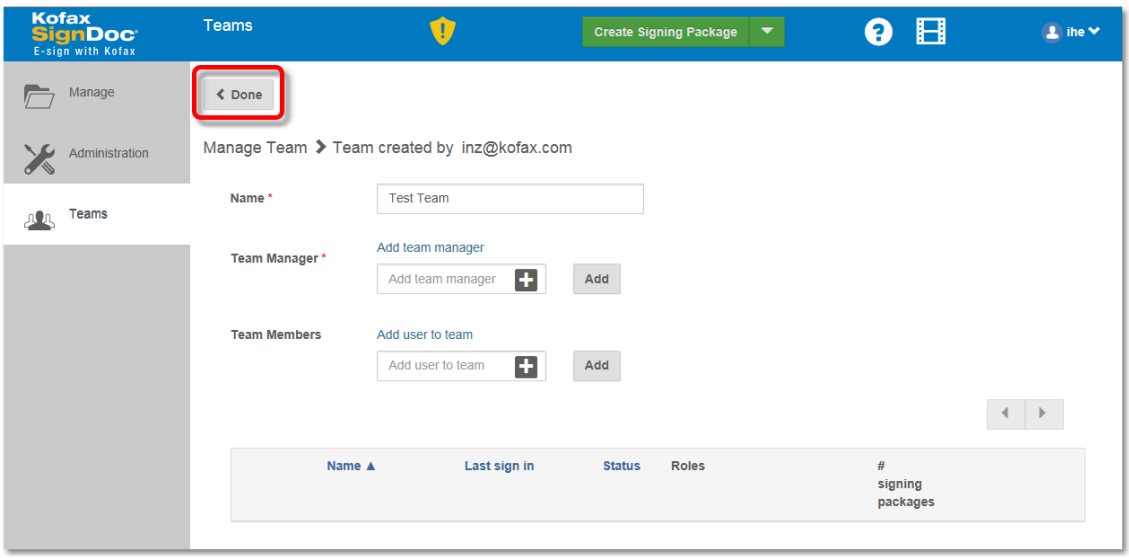
6. Click on **Done** button.



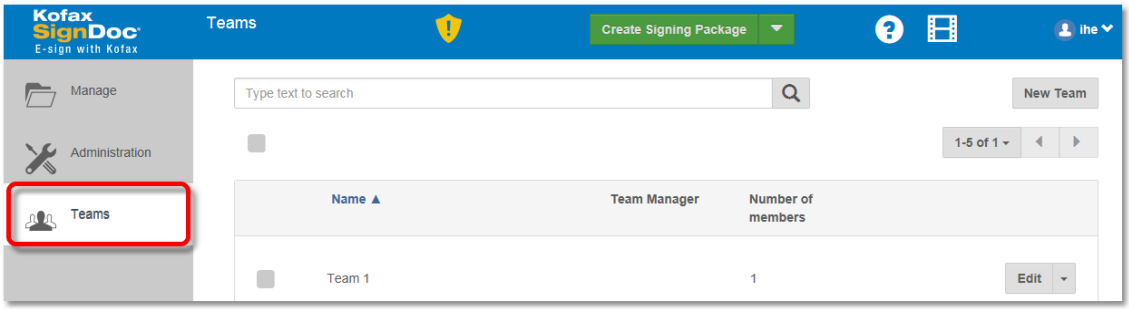
The members and managers of the team will be notified per email.

10.2 Add a Team Member

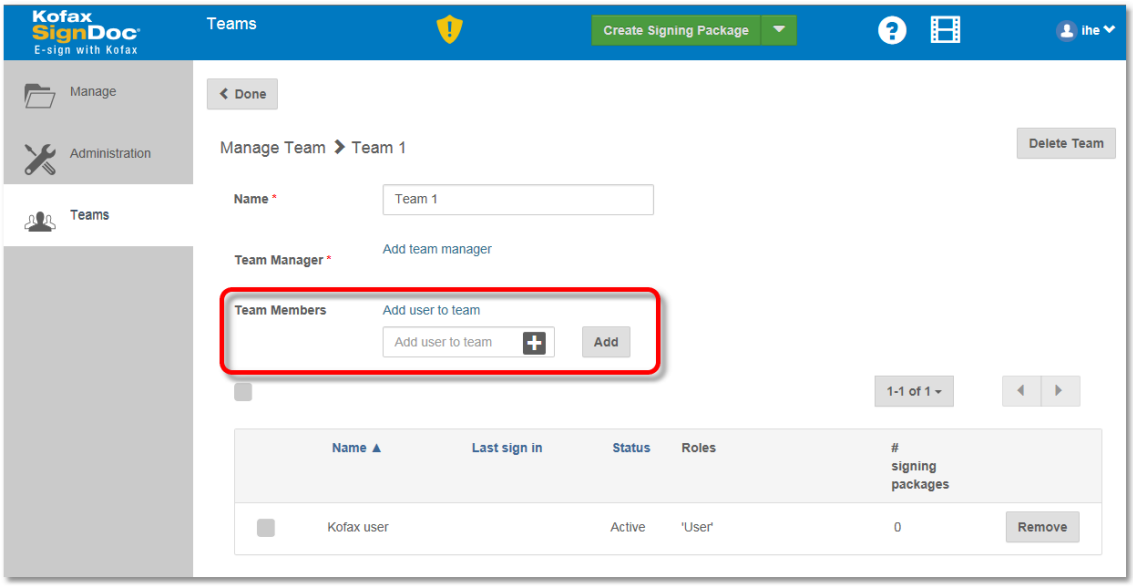
NOTE

This functionality is only available when the accessing Kofax SignDoc user has the role team manager for this team or account administrator.

1. Go to the **Teams** panel on the left hand navigation side.



2. Optional: Add a Kofax SignDoc user as team manager.
3. Add a Kofax SignDoc user as team member.
   a. Enter user name.
   b. Press **Enter** key or click on **Add** button.



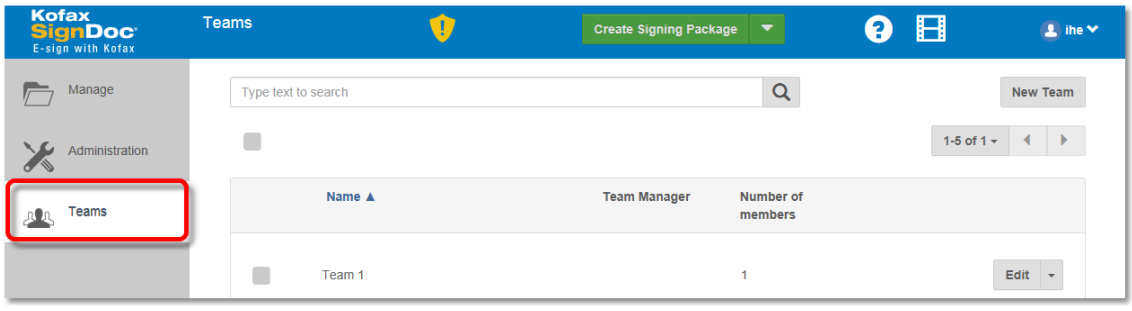
4. Click on **Done** button.
   The users you added to a team will be notified with an email about their new team membership.

10.3 Delete Team

NOTE

This functionality is only available when the accessing Kofax SignDoc user has the role team manager for this team or account administrator.

1. Go to the **Teams** panel on the left hand navigation side.



2. Select a team.

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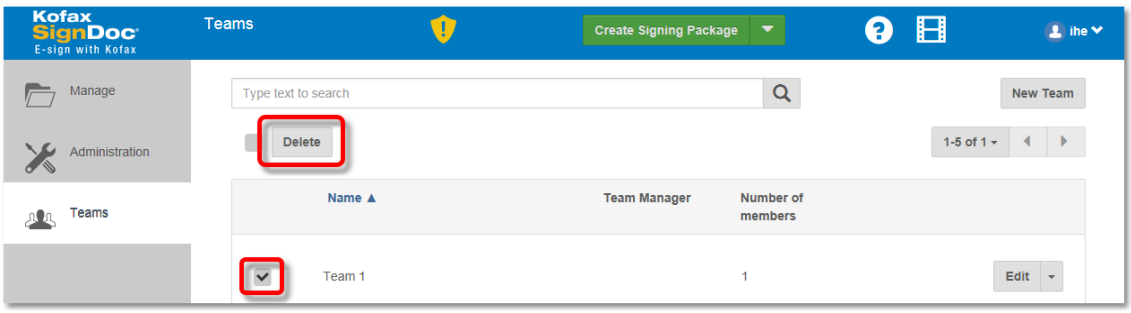
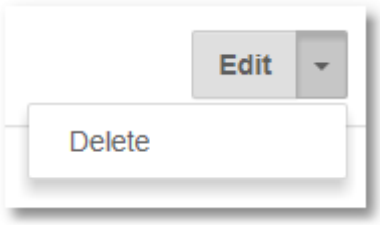
3. Select **Delete** button.



or click **Edit** and then the **Delete** button from the dropdown menu.



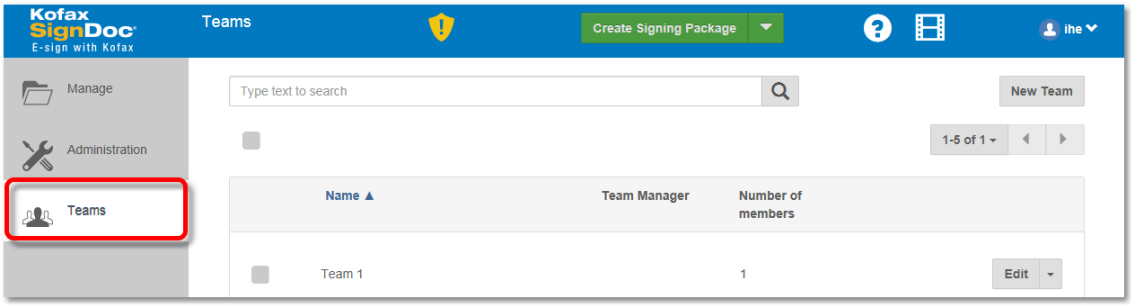
4. The team is removed from the list of teams.

10.4 Delete Team Member

NOTE

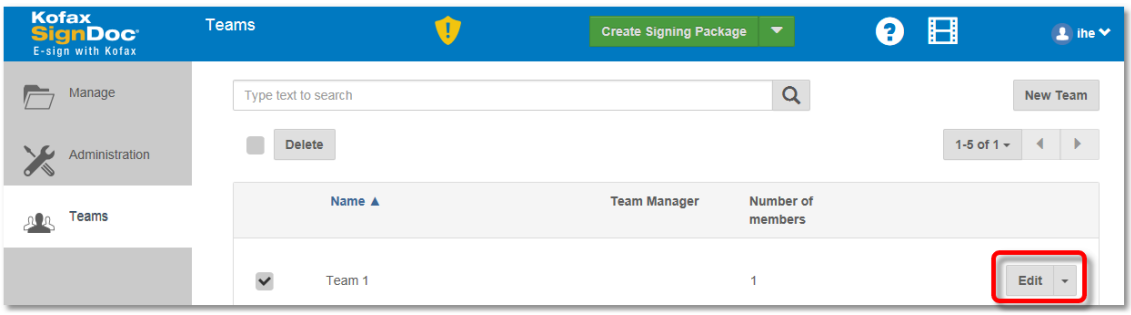
This functionality is only available when the accessing Kofax SignDoc user has the role team manager for this team or account administrator.

1. Go to the **Teams** panel on the left hand navigation side.

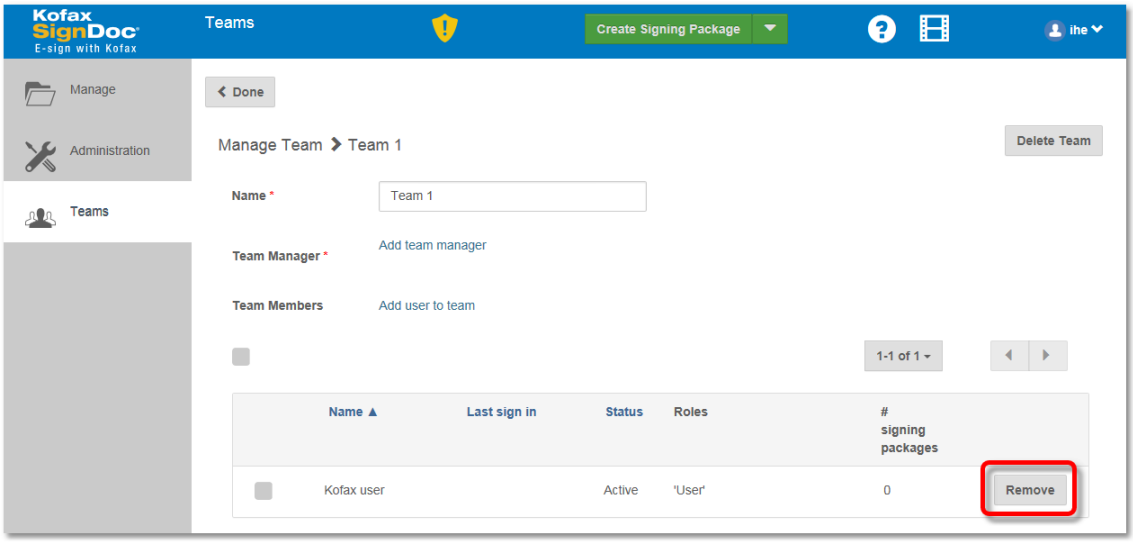


2. Select the appropriate team.

3. Click the button **Edit** next to the team.



3. Select a user name.
4. Click on **Remove** button.



11 Glossary

Term	Description
Account Administrator	A person who uses the software for creating Signing Packages or Template Packages. The person will initiate the Kofax SignDoc sequence and administrate roles of users within the account. An account can have more than one administrators.
Any	Any is used when an editable field (text field, check box) can be filled by each recipient with the role signer.
Authentication	Option to limit access to the signing package to authorized persons only.

Term	Description
Autocomplete search	Search function that helps finish what is being typed by comparing the current text with that which was entered previously.
Completed Signing Package	All recipient have fulfilled the required actions. No recipient has declined the signing package.
Customer	Company buying Kofax SignDoc.
Declined Signing Package	A recipient has declined to sign or review the Signing Package.
FinalDocument	A pdf file containing the audit trail information and the signed pdf documents.
In-person signing	In-person signing allows one or more persons to review and/or sign the documents with the assistance of the signing host (the account holder). The participants of the signing session need to be physically present. The signing host will facilitate but not necessarily participate in the signing session. The signing host will oversee that control of the signing device is passed on to the active signer.
Kofax SignDoc user	A person who will initiate the Kofax SignDoc sequence to create a Signing Package or a Template Package, Manage his own created tasks Create / maintain workflow View (dashboard) / receives (email) status information / notifications Receives audit data specific information
Recipient	Is a person (identified by name and email address) that will receive an invitation to the signing package.
Reviewer	Reviewer is a role of a recipient. Recipients with the role reviewer receive the signing package for information. • A reviewer can not edit the contents of interactive fields. • A reviewer must accept e-sign Consent. • A reviewer must open the document. • A reviewer can decline or complete a package only once. ○ A reviewer must provide a decline reason.
Signer	Signer is a role of a recipient. • A signer has interactive fields assigned to. • A signer can edit the contents of interactive fields if the field is not set to readonly. • A signer must accept the e-sign consent before completing the document. • A signer must open the document.

Term	Description
	○ If all fields are marked as optional for the signer, the document is immediately considered completed after it is opened. • A signer must complete all required fields of a document that have been uniquely assigned to the signer. • A signer can decline or complete a package only once. ○ A signer must provide a decline reason.
Signing Package	A Signing Package is a container used to send one or more documents for signing or reviewing. A Signing Package can have multiple multi-page documents and several recipients with different roles.
Team	A team is responsible for a certain set of Signing Packages of one Kofax SignDoc account.
Team Manager	A Kofax SignDoc user defined to administrate a team, Assign Team Manager for this team. Invite Users to become a Team member. A team can have more than one manager.
Team Member	A Kofax SignDoc user associated with the account and with Signing Packages and Template Packages of a team
Template Package	A Template Package is a container that can have multiple multi-page documents and several recipient aliases with different roles.
Voided Signing Package	The sender of the Signing Package (Kofax SignDoc user) has cancelled the Signing Package.

12 Appendix

Time Zone Information
Contact Information
Trademarks
Copyright Notice

12.1 Time Zone Information

Process Changes

If no time zone is set for a user date and time values are shown in the default time zone as before. This is the time zone where the server runs.

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CirrusTimeZoneList.java

A new class providing a Windows-like list of time zones combined with a 2-char ISO3166 country code.

If the time zone of the user is empty in the database a time zone is looked up by using the given offset and the locale derived from the HTTP request header 'Accept-Language'. If no locale can be derived from the request the default locale is used, which is the servers locale.

If the offset AND the 2-char ISO3166 country code can be found in the CirrusTimeZoneList the first matching entry is used.

If the offset from the client does not match the standard offset of the country only one of the following time zones are set which have in general no country assigned.

```
-720|   Dateline Standard Time    (GMT -12:00) International Date Line West
-660|   GMT -11                   (GMT -11:00) Coordinated Universal Time-11
0   |   GMT                       (GMT) Coordinated Universal Time
720|    GMT +12                   (GMT +12:00) Coordinated Universal Time+12
```

In all other cases where the offset from the client does not match the standard offset of the country the time zone is not set.

The four pairs below have the same country and offset information but differ in daylight saving settings. In that cases the user must correct the setting manually if appropriate.

```
-420|US   US Mountain Standard Time   (GMT -07:00) Arizona
-420|US   Mountain Standard Time      (GMT -07:00) Mountain Time (US & Canada)

-300|US   Eastern Standard Time       (GMT -05:00) Eastern Time (US & Canada)
-300|US   US Eastern Standard Time    (GMT -05:00) Indiana (East)

570|AU    Cen. Australia Standard Time (GMT +09:30) Adelaide
570|AU    AUS Central Standard Time    (GMT +09:30) Darwin

600|AU    E. Australia Standard Time   (GMT +10:00) Brisbane
600|AU    AUS Eastern Standard Time    (GMT +10:00) Canberra, Melbourne, Sydney
```

Listing of the time zones in the selection list:

```
-720|                   Dateline Standard Time          (GMT -12:00) International Date
    Line West
-660|                   GMT -11                         (GMT -11:00) Coordinated
    Universal Time-11
-600|US                 Hawaiian Standard Time          (GMT -10:00) Hawaii
-540|US                 Alaskan Standard Time           (GMT -09:00) Alaska
-480|MX                 Pacific Standard Time (Mexico)  (GMT -08:00) Baja California
-480|US                 Pacific Standard Time           (GMT -08:00) Pacific Time (US &
    Canada)
-420|US                 US Mountain Standard Time       (GMT -07:00) Arizona
-420|MX|BO              Mountain Standard Time (Mexico) (GMT -07:00) Chihuahua, La Paz,
    Mazatlan
-420|US                 Mountain Standard Time          (GMT -07:00) Mountain Time (US
    & Canada)
-360|GT                 Central America Standard Time   (GMT -06:00) Central America
-360|US                 Central Standard Time           (GMT -06:00) Central Time (US &
    Canada)
-360|MX                 Central Standard Time (Mexico)  (GMT -06:00) Guadalajara,
    Mexico City, Monterrey
-360|CA                 Canada Central Standard Time    (GMT -06:00) Saskatchewan
-300|CO|PE|EC           SA Pacific Standard Time        (GMT -05:00) Bogota, Lima,
    Quito
-300|US                 Eastern Standard Time           (GMT -05:00) Eastern Time (US &
    Canada)
-300|US                 US Eastern Standard Time        (GMT -05:00) Indiana (East)
-270|VE                 Venezuela Standard Time         (GMT -04:30) Caracas
-240|PY                 Paraguay Standard Time          (GMT -04:00) Asuncion
-240|CA                 Atlantic Standard Time          (GMT -04:00) Atlantic Time
    (Canada)
-240|BR                 Central Brazilian Standard Time (GMT -04:00) Cuiaba
-240|BO|BR|AR           SA Western Standard Time        (GMT -04:00) Georgetown, La
    Paz, Manaus, San Juan
```

```
-240|CL                 Pacific SA Standard Time        (GMT -04:00) Santiago
-210|CA                 Newfoundland Standard Time      (GMT -03:30) Newfoundland
-180|BR                 E. South America Standard Time  (GMT -03:00) Brasilia
-180|AR                 Argentina Standard Time         (GMT -03:00) Buenos Aires
-180|GF|BR              SA Eastern Standard Time        (GMT -03:00) Cayenne, Fortaleza
-180|GL                 Greenland Standard Time         (GMT -03:00) Greenland
-180|UY                 Montevideo Standard Time        (GMT -03:00) Montevideo
-120|                   GMT -02                         (GMT -02:00) Coordinated
    Universal Time-02
-120|                   Mid-Atlantic Standard Time      (GMT -02:00) Mid-Atlantic
-60|PT                  Azores Standard Time            (GMT -01:00) Azores
-60|CV                  Cape Verde Standard Time        (GMT -01:00) Cape Verde Is.
0  |MA                  Morocco Standard Time           (GMT) Casablanca
0  |                    GMT                             (GMT) Coordinated Universal
    Time
0  |IE|PT|GB           GMT Standard Time               (GMT) Dublin, Edinburgh,
    Lisbon, London
0  |LR|IS               Greenwich Standard Time         (GMT) Monrovia, Reykjavik
60 |DE|NL|CH|IT|SW|AT   W. Europe Standard Time        (GMT +01:00) Amsterdam, Berlin,
    Bern, Rome, Stockholm, Vienna
60 |RS|SK|HU|SI|CZ      Central Europe Standard Time    (GMT +01:00) Belgrade,
    Bratislava, Budapest, Ljubljana, Prague
60 |BE|DK|ES|FR         Romance Standard Time           (GMT +01:00) Brussels,
    Copenhagen, Madrid, Paris
60 |BA|MK|PL|HR         Central European Standard Time  (GMT +01:00) Sarajevo, Skopje,
    Warsaw, Zagreb
60 |NG                  W. Central Africa Standard Time (GMT +01:00) West Central
    Africa
60 |NA                  Namibia Standard Time           (GMT +02:00) Windhoek
120|JO                  Jordan Standard Time            (GMT +02:00) Amman
120|GR|RO|TR            GTB Standard Time               (GMT +02:00) Athens, Bucharest,
    Istanbul
120|LB                  Middle East Standard Time       (GMT +02:00) Beirut
120|EG                  Egypt Standard Time             (GMT +02:00) Cairo
120|SY                  Syria Standard Time             (GMT +02:00) Damascus
120|ZW|ZA               South Africa Standard Time      (GMT +02:00) Harare, Pretoria
120|UA                  FLE Standard Time               (GMT +02:00) Helsinki, Kyiv,
    Riga, Sofia, Tallinn, Vilnius
120|IL                  Israel Standard Time            (GMT +02:00) Jerusalem
180|BY                  E. Europe Standard Time         (GMT +02:00) Minsk
180|IQ                  Arabic Standard Time            (GMT +03:00) Baghdad
180|SA                  Arab Standard Time              (GMT +03:00) Kuwait, Riyadh
180|KE                  E. Africa Standard Time         (GMT +03:00) Nairobi
210|IR                  Iran Standard Time              (GMT +03:30) Tehran
240|RU                  Russian Standard Time           (GMT +03:00) Moscow, St.
    Petersburg, Volgograd
240|AE                  Arabian Standard Time           (GMT +04:00) Abu Dhabi, Muscat
240|AZ                  Azerbaijan Standard Time        (GMT +04:00) Baku
240|MU                  Mauritius Standard Time         (GMT +04:00) Port Louis
240|GE                  Georgian Standard Time          (GMT +04:00) Tbilisi
240|AM                  Caucasus Standard Time          (GMT +04:00) Yerevan
270|AF                  Afghanistan Standard Time       (GMT +04:30) Kabul
300|PK                  Pakistan Standard Time          (GMT +05:00) Islamabad, Karachi
300|UZ                  West Asia Standard Time         (GMT +05:00) Tashkent
330|IN                  India Standard Time             (GMT +05:30) Chennai, Kolkata,
    Mumbai, New Delhi
330|LK                  Sri Lanka Standard Time         (GMT +05:30) Sri
    Jayawardenepura
345|NP                  Nepal Standard Time             (GMT +05:45) Kathmandu
360|RU                  Ekaterinburg Standard Time      (GMT +05:00) Ekaterinburg
360|KZ                  Central Asia Standard Time      (GMT +06:00) Astana
360|BD                  Bangladesh Standard Time        (GMT +06:00) Dhaka
390|MM                  Myanmar Standard Time           (GMT +06:30) Yangon (Rangoon)
420|RU                  N. Central Asia Standard Time   (GMT +06:00) Novosibirsk
420|TH|ID               SE Asia Standard Time           (GMT +07:00) Bangkok, Hanoi,
    Jakarta
480|RU                  North Asia Standard Time        (GMT +07:00) Krasnoyarsk
480|CN                  China Standard Time             (GMT +08:00) Beijing,
    Chongqing, Hong Kong, Urumqi
480|SG                  Singapore Standard Time         (GMT +08:00) Kuala Lumpur,
    Singapore
480|AU                  W. Australia Standard Time      (GMT +08:00) Perth
480|TW                  Taipei Standard Time            (GMT +08:00) Taipei
480|MN                  Ulaanbaatar Standard Time       (GMT +08:00) Ulaanbaatar
540|RU                  North Asia East Standard Time   (GMT +08:00) Irkutsk
540|JP                  Tokyo Standard Time             (GMT +09:00) Osaka, Sapporo,
    Tokyo
540|KR                  Korea Standard Time             (GMT +09:00) Seoul
```

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570|AU                  Cen. Australia Standard Time     (GMT +09:30) Adelaide
570|AU                  AUS Central Standard Time        (GMT +09:30) Darwin
600|RU                  Yakutsk Standard Time            (GMT +09:00) Yakutsk
600|AU                  E. Australia Standard Time       (GMT +10:00) Brisbane
600|AU                  AUS Eastern Standard Time        (GMT +10:00) Canberra,
    Melbourne, Sydney
600|PG                  West Pacific Standard Time       (GMT +10:00) Guam, Port Moresby
600|AU                  Tasmania Standard Time           (GMT +10:00) Hobart
660|RU                  Vladivostok Standard Time        (GMT +10:00) Vladivostok
660|SB                  Central Pacific Standard Time    (GMT +11:00) Solomon Is., New
    Caledonia
720|RU                  Magadan Standard Time            (GMT +11:00) Magadan
720|NZ                  New Zealand Standard Time        (GMT +12:00) Auckland,
    Wellington
720|                    GMT +12                          (GMT +12:00) Coordinated
    Universal Time+12
720|FJ                  Fiji Standard Time               (GMT +12:00) Fiji, Marshall Is.
720|RU                  Kamchatka Standard Time          (GMT +12:00) Petropavlovsk-
    Kamchatsky - Old
780|TO                  Tonga Standard Time              (GMT +13:00) Nuku'alofa
780|WS                  Samoa Standard Time              (GMT -11:00) Samoa
```

References

Normative source for time zone information: IANA time zone database

Convenient presentation with country codes:
http://en.wikipedia.org/wiki/List_of_tz_database_time_zones

12.2 Contact Information

The Kofax technical support team will be happy to assist you.

If you need support with regards to purchased Signature products please contact us via Kofax Customer Portal:

https://techsupport.kofax.com

12.3 Trademarks

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