



Kofax SignDoc Desktop 3.4.7

**Installation and User Guide** 



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# 1 Preface to SignDoc Desktop

Thank you for choosing SignDoc Desktop.

SignDoc Desktop allows you to embed handwritten signatures into electronic documents (PDF and TIFF) in a legally binding, trustworthy, and secure manner. SignDoc Desktop® allows you to visualize, fill and sign electronic documents and create electronic signatures using your handwritten signature. This documentation provides the description of the SignDoc Desktop application usage.



Signing requires a signature capture device to be installed (writing tablets, pen pads or interactive pen displays) or a Tablet PC with electromagnetic digitizer or a smartphone. Tablets with Touchscreens using Windows 8

Professional are also supported. On Tablets with Windows 8 RT, such as the simple Surface Tablet from Microsoft, the App SignDoc Mobile for Windows should be used instead of SignDoc Desktop.

SignDoc Desktop captures the handwritten "biometric" signature plus time and date of the signing ceremony. The integrity value (Hash) of the document will be calculated and stored in the signature field together with the biometric signature. The captured signature will be displayed in the document and is also visible in standard PDF Readers.

SignDoc Desktop® offers the following features:

- View electronic documents (PDF and TIFF)
- · Auto-insert the signature fields

SignDoc Desktop can insert signature fields in PDF documents automatically at positions indicated by text markers. The relative position of each signature field with respect to the text marker and the size of the signature field can be configured.

Fill in PDF forms

PDF documents containing editable form fields (text fields and check boxes) can be edited directly in the SignDoc Desktop application.

- Scribble & Annotate
  - SignDoc Desktop allows users to draw freely on the electronic document in several colors. The pen strokes from Tablet PCs, interactive pen displays or a regular mouse are converted into digital ink.
- Sign documents electronically using your handwritten signatures

The digital signature contains biometric information about how the signature was signed such as speed and pressure of pen strokes. These characteristics represent a biometric profile which is unique to every individual and can not be reproduced by a forger.

Organize document storage

The storage location can be configured, SignDoc Desktop will save the file when the icon [Save and Close] is pressed.

Display signed version

SignDoc Desktop displays the signature fields in a tree-view that also can be used to display the version of the document when it was signed with any signature. Providing an easy way to compare different versions of a document throughout a documents potentially complex history of modifications.

Perform validation

Validate signature signed by SignDoc Desktop from standard PDF viewers. Notably the popular free Adobe Reader®.

- Seamless Integration in e-Workflow
  - SignDoc Desktop delivers sample that shows the implementation and integration of the ActiveX Control component. It can be used to integrate and customize the entire SignDoc Desktop solution within your own application. Effortlessly open, sign, save and close the document using the ActiveX interface.
- Convert into PDF format using SOFTPRO Printer Driver
   SignDoc Desktop includes the SOFTPRO Printer Driver that enables a possibility to convert documents that are created in other applications into PDF format and open it directly in the SignDoc Desktop application for the signing ceremony.
- Easily preview pages in large documents for quick navigation
   SignDoc Desktop provides intuitive quick navigation of documents by providing a preview sidebar for easily finding the pages you are looking for within your documents.
- Never wonder again if you have completed mandatory fields in your document forms

  Mandatory fields that should never be left unsigned are easily searchable and displayed within SignDoc Desktop for quick access.
- <u>Usage of different certificate types for maximum flexibility and security</u> SignDoc Desktop provides the ability to use either self-signed certificates generated on the fly, or you can use your own certificates for signing.
- Attach a variety of additional documents to your signed documents
   Need a way to add additional documents to your contracts? SignDoc Desktop allows you the flexibility of adding any attachment to a document before signing. The attachment is signed and secured with the document to be signed.
- Attach a variety of additional documents directly from your scanner
   Additional attachments can be added to a document directly from a scanner or camera.
- Sign your documents using a picture directly from your camera
   Need additional proof of signing? Why not add a picture as a true signature within your documents? SignDoc Desktop allows the placement of picture fields within a document and let's you take a photo of your signer.
- Prevent documents from being tampered with in any way after signing
   In addition to using Adobe standards for auditing, SignDoc Desktop also provides you with an optional means of preventing ANY tampering with a document after it has been signed by locking fields.

Please visit <u>Kofax Website</u> for more information about the trustworthy integration of handwritten signatures in electronic processes.

# 2 Introduction to Digital Signatures

### **Digital Signatures**

A digital signature in an electronic document functions like a handwritten signature for printed documents. A valid digital signature can assert a person's (or entity's) agreed consent to the document which the signature was applied. Below are some of the common reasons for using digital signatures.

### **Identity Authentication**

One or more Digital Certificates accompany a digital signature. The digital certificate provides a means of proving identity. They bind an identity to a pair of electronic keys that are used to encrypt and sign the document.

### Integrity

If a document is digitally signed any change to the document after the signature will be recognised.

It is considered computationally infeasible to modify a document and its signature to produce a new document with a valid signature.

### Non-repudiation of Origin

Secure digital signatures cannot be repudiated; the signer or a document cannot later disown it by claiming the signature was forged.

### **Digital Time-stamping**

SignDoc Desktop can be configured to use a digital time stamping service. The Digital time stamping further enhances the digital signature security by providing secure time information about creation and modification time of a document. A digital time stamping services issues a timestamp which associates a date and time with a digital signature in a cryptographically strong way. This system is particularly interesting when using the click to sign scenario.

### **Digital Signature Authentication**

In SignDoc Desktop using the VerificationPolicy you can modify the behavior of SignDoc Digital Certificate verification. Depending on your security requirements you can tailor the certificate authentication to meet your needs.

### VerificationPolicy.CertificateChain

The certificate chain, also known as the certification path, is a list of certificates used to authenticate an entity. The process of verifying the authenticity and validity of a certificate involves checking all of the certificates in the chain of certificates from the original, universally trusted Certificate Authority, through any intermediate Certificate Authorities.

### VerificationPolicy.CertificateRevocation

A Certificate revocation list is a list of certificates that have been revoked, and therefore should not be relied upon.

### VerificationPolicy.VerificationModel

Certificate verification model, only Windows Crypto API is supported at this time.

# 3 Installing and Uninstalling SignDoc Desktop

Installation Requirements
Installing SignDoc Desktop
Installing SignDoc Desktop Silently
Uninstalling SignDoc Desktop

# 3.1 Installation Requirements

SignDoc Desktop is developed and supported for usage on Microsoft® Windows 8 Professional, Windows 7, and Windows Server 2008/2012.

# A NOTE

Kofax offers the maintenance of the licensed Software only as long as each involved third-party vendor of such software maintains the respective version of the system software (operating

system, network, database, communications server) used by the customer. If the third party vendor discontinues this maintenance, customer shall be obligated to convert to a version of the system software supported by the vendor.

The following system requirements are given:

- CPU Standard Desktop CPU
- RAM min. 1 GB
- min. 580 MB of free space

SignDoc Desktop is designed to work with various signature capturing devices. SignDoc Desktop supports external USB signature capture devices, Tablet PC, Pen&Touch devices and smartphones.

The SignDoc Desktop Setup already contains drivers of the supported signature capture devices.

 Apple's Bonjour Service is used to discover devices within the local network.



# 3.2 Installing SignDoc Desktop

SignDoc Desktop can be installed using the automatic installer **SignDocDesktop-3.4.7.exe**. This installer will install all the necessary components on your computer to assure that the application can be started and used right away.

# **A** IMPORTANT NOTE

SignDoc Desktop installation requires administrator rights. Please make sure that you are logged in as a user with **administrator rights**, before starting the installer.

Please uninstall any previous version of the SignDoc Desktop before installing this new version.

The installation process is logged in the file "%TEMP%\SignDoc\_Setup.log".

To install SignDoc Desktop:

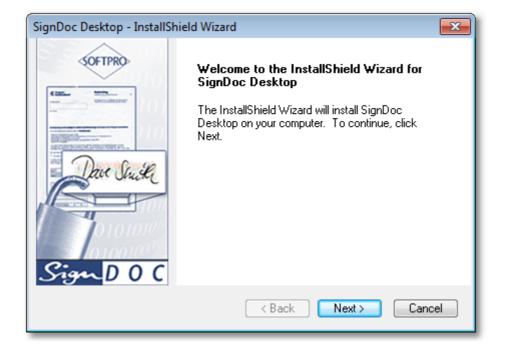
1. Start (double click) SignDoc Desktop installer **SignDocDesktop-3.4.7.exe**.

2. The installer offers you to choose a preferred language to be used during installation process. Choose the preferred language. English and German are currently supported. Click **OK** to continue.



3. The installer will prepare the InstallShield Wizard. Once prepared, the welcome to the InstallShield dialog will be displayed.

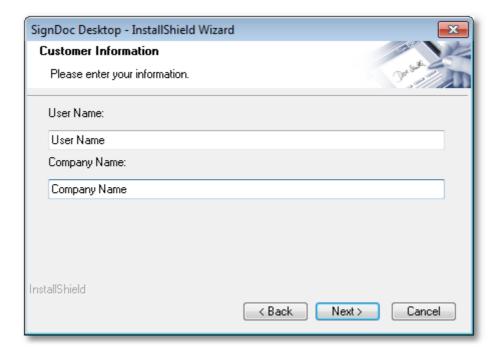
Please click Next to continue.



4. License agreement will be displayed in the next dialog. Please read and accept it.



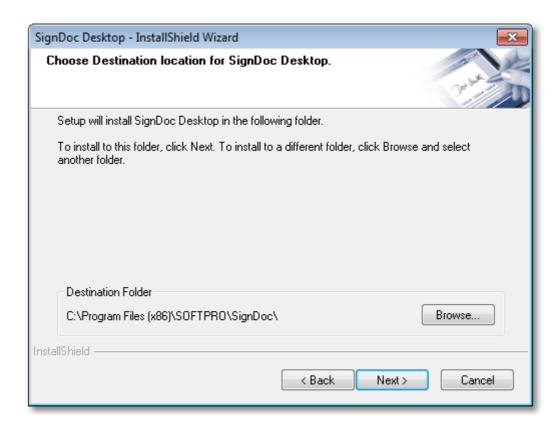
5. InstallShield Wizard will ask to specify the **User Name** and **Company Name** in the customer information dialog. Specify the required information and click **Next** button to continue.



6. Specify the destination location for the SignDoc Desktop. By default, InstallShield Wizard will install SignDoc Desktop to:

C:\Program Files\Kofax\SignDocDesktop

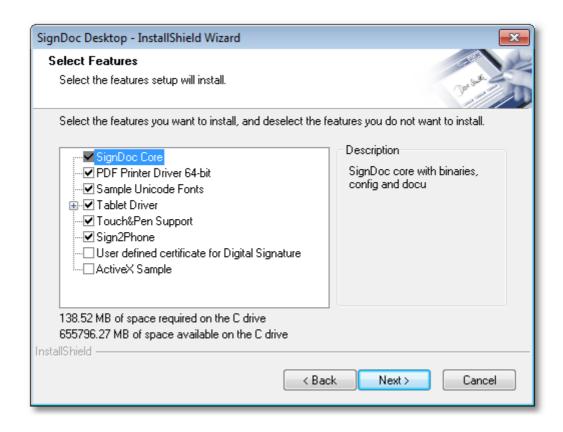
Use the default destination folder or choose any other preferred destination folder using **Browse...**. Once selected, click **Next** to continue.



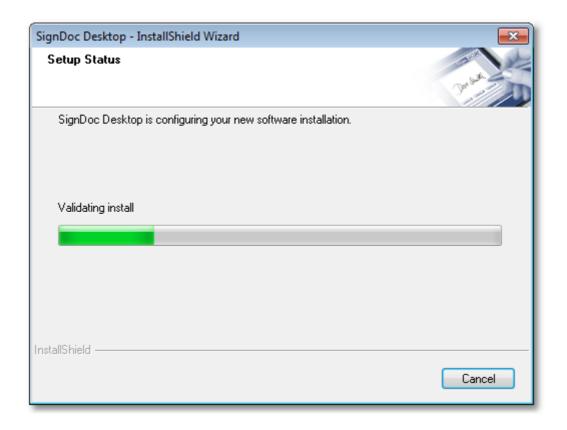
7. Select the features you would like to install. By default in the dialog the following options are marked:

**SignDoc Core**, **PDF Printer Driver** 64-bit or 32-bit (inclusive GhostScript), **Sample Unicode Fonts**, **Tablet Driver**, **Touch&PenSupport** and **Sign2Phone** 

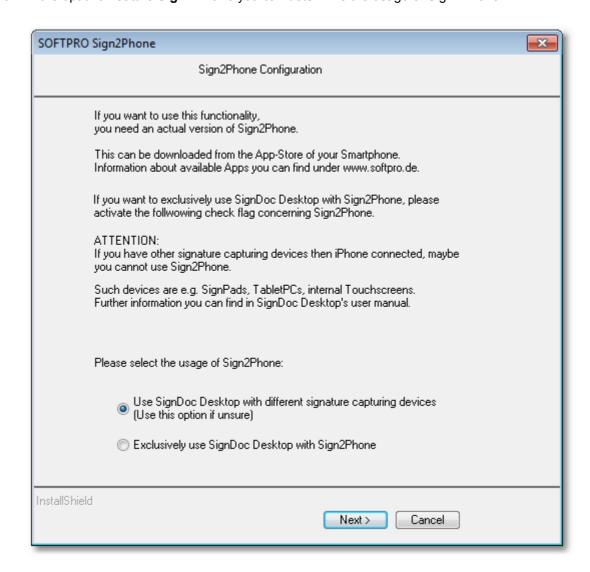
Remove the check mark in the selection box in front of the components you do not want to install. All selected features will be installed on the computer after clicking **Next**.



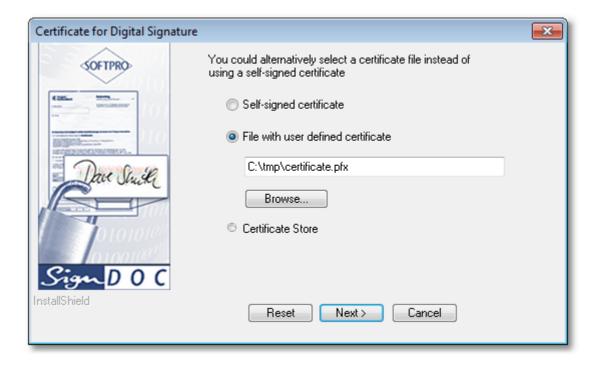
8. The InstallShield will begin the installation process and the progress bar will be showing the status of the installation. Please wait.



9. In the optional feature **Sign2Phone** you can determine the usage of Sign2Phone.



10. In the optional feature User-defined certificate for digital signature you can select your own certificate file for the digital signatures as alternative to the self-signed certificate. A further possibility is the usage of the Windows Certificate Store.

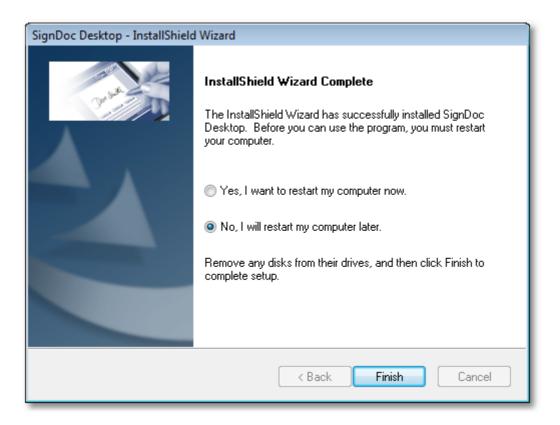


11. InstallShield will give the option to view the README file and/or to create a desktop icon for SignDoc Desktop.

Please select the preferred options and click **Finish** to close the InstallShield Wizard.

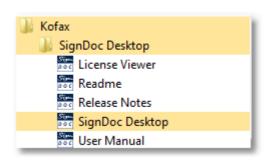


12. Under certain circumstances, which are dependent on the selection of the components to be installed and the operating system, the following dialog is displayed:



13. The SignDoc Desktop installer has created an entry in your folder **Programs**. To start the SignDoc Desktop application choose:

Start > Programs > Kofax > SignDoc Desktop > SignDoc Desktop



If you have chosen the corresponding option in the finishing step of the InstallShield Wizard you can also start SignDoc Desktop from the desktop icon:



# 3.3 Uninstalling SignDoc Desktop

### **A** IMPORTANT NOTE

If you have installed a license this process will also delete your existing license.

It is recommended to backup your license file before starting the uninstallation process.

The default location of the license file is:

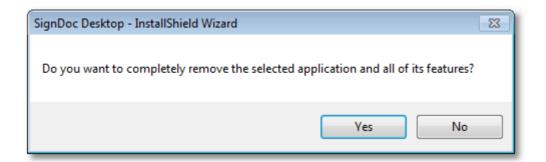
C:\ProgramData\SOFTPRO\Licenses\SignDoc.lic

SignDoc Desktop application can be uninstalled from:

### **Control Panel > Programs and Features**

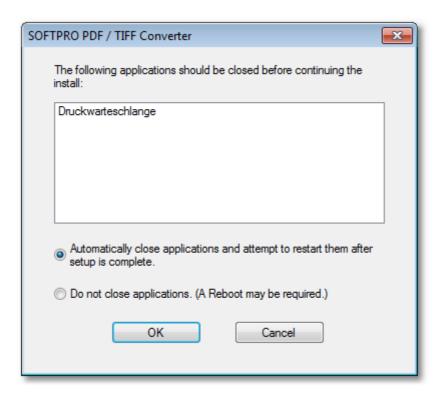
Please select SignDoc Desktop in the list of the installed applications and click Uninstall.

A message asking to confirm if you really would like to uninstall the selected application and its features will be displayed.



Please confirm by clicking **Yes** and the uninstallation process will be started. The progress bar will be indicating the status of the uninstallation.

Any of the following dialogues may appear during uninstallation.



Please choose one of the options and confirm with **OK**.



If you click **Yes** the **config** directory in the installation path will **not** be deleted. The configuration files **SignDoc2.ini** and **SDAutoprepare.ini** as well as the file **0001-public.key** are preserved and will not be overwritten with the next installation of SignDoc Desktop.

If you click **No** the directory the **config** directory and all the files contained in it will be deleted. Next time SignDoc Desktop is installed the installation procedure will place the default files in this directory directory.

Once completed, all the SignDoc Desktop application components will be removed.

# 3.4 Installing and Uninstalling SignDoc Desktop Silently

### General

The installation can be run in silent mode e.g. using a batch file with some options.

For this purpose a response file, by default setup.iss, will be needed.

A response file can be created by running the installation program (by default **SignDocDesktop-3.4.7.exe**) with the **/r** option.

### **Create Response File for Installation Procedure**

The install program **SignDocDesktop-3.4.7.exe** should be started in Record mode with the following options.

Option	Description
/r	Record Mode Displays all run-time Dialogs and stores the data in a file.
/f1	Path for response file In the example: <b>Setup.iss</b>

### **Example**

SignDocDesktop-3.4.7.exe /r /f1"C:\Temp\Setup.iss"

### **Create Response File for Uninstallation Procedure**

The installation program **SignDocDesktop-3.4.7.exe** should be started in Record mode with the following options.



SignDoc Desktop must be installed on the system (see Installing SignDoc Desktop).

Option	Description
/r	Record Mode Displays all run-time Dialogs and stores the data in a file.
/f1	Path for response file In the example: Uninstall_Setup.iss

### **Example**

SignDocDesktop-3.4.7.exe /r /f1"C:\Temp\Uninstall\_Setup.iss"

### **Installation in Silent Mode**

- 1. Start the command window (CMD).
- 2. Start the installation procedure as shown in the example below.

### Example

SignDocDesktop-3.4.7.exe /s /L1033 /f1"C:\Temp\Setup.iss" /f2"C:\Temp\Setup.log'

### **Uninstallation in Silent Mode**

- 1. Start the command window (CMD).
- 2. Start the uninstallation procedure as shown in the example below.

### **Example**

SignDocDesktop-3.4.7.exe /s /L1033 /f1"C:\Temp\Uninstall Setup.iss" /f2"C:\Temp\

### **Options**

Option	Description
/L1033	Installation in English
/L1031	Installation in German
/s	Silent Mode
/f1	Path for the response file
/f2	Path for the log file, with the install result (ResultCode=0 is called no errors)

# 4 Using SignDoc Desktop

Starting SignDoc Desktop

Signing a Document

Inserting a Picture into a Document

SignDoc Desktop Toolbar

SignDoc Desktop Menu

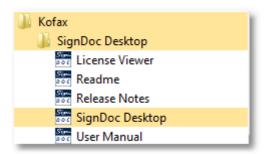
Signature Field Context Menu

Windows Explorer Integration

# 4.1 Starting SignDoc Desktop

Start your SignDoc Desktop application by opening the **Start** menu and selecting the **SignDoc Desktop** start link:

Start > Programs > Kofax > SignDoc Desktop > SignDoc Desktop

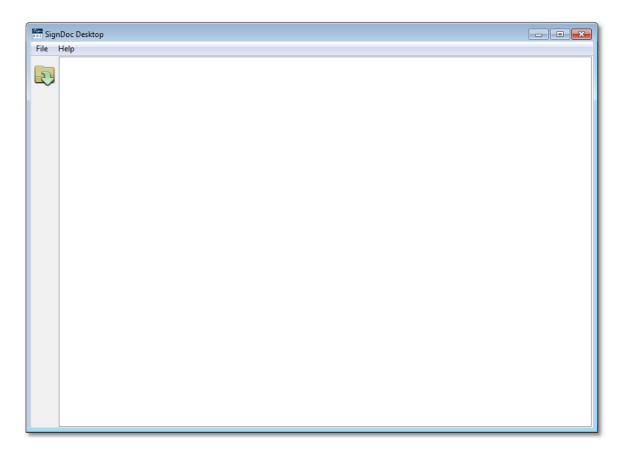


SignDoc Desktop welcomes you with a splash screen:



Your SignDoc Desktop application is started in the background and appears while the start screen fades out.

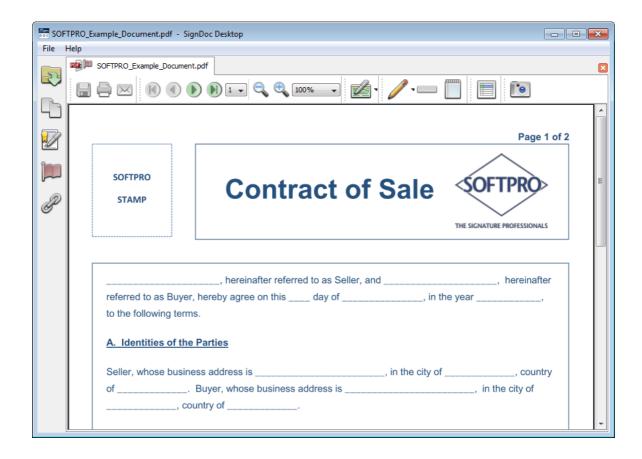
The screenshot below shows how SignDoc Desktop will appear with no document loaded:



Opening a document in SignDoc Desktop is a simple task and similar to many other applications which you may be using:

File > Open

- The file selection dialog will be started.
- Select a PDF or TIFF document and click the **Open** button.



# **Starting SignDoc Desktop with Command Line Parameters**

To start SignDoc Desktop with command line parameters please start **SignDoc32.exe** or **SignDoc32\_cmd.exe** from SignDoc Desktop installation folder. The default setting for the installation folder is:

C:\Program Files\Kofax\SignDocDesktop

**SignDoc32.exe** is a Windows application. **SignDoc32\_cmd.exe** is a console application; it starts and exits synchronously. Both these application have the same command line parameters.

### **Open Document**

To open a document in SignDoc Desktop use following syntax:

SignDoc32.exe [filename]

Please specify the fully qualified path to the desired file.



If there are spaces in the path please quote the entire path to the input file.

### **Examples**

```
SignDoc32.exe c:\sample.pdf
SignDoc32.exe "c:\my folder\sample.pdf"
```

### **Start Application Minimized**

```
SignDoc32.exe -minimize
```

### **Start Application Maximized**

```
SignDoc32.exe -maximize
```

### Start Application with Specifying Prepare JavaScript File

The following example shows how you can open and prepare a document with a JavaScript file.

### **Example**

```
SignDoc32.exe -jscript prepare=detect.js c:\sample.pdf
```

### **Print a Document without a Graphical User Interface**

To print a document using SignDoc Desktop without a Graphical User Interface use the following syntax:

```
SignDoc32.exe -print -pages [PAGES] -printer [PRINTER_NAME]
    [filename]
```

Option	Description
-pages	Optional Used in combination with -print, [PAGES] is a comma separated list of integers
-printer	Optional Used in combination with -print, [PRINTER_NAME] is the printer name

### **Examples**

```
SignDoc32.exe -print c:\sample.pdf
SignDoc32.exe -print -pages 1,2,3 c:\sample.pdf
SignDoc32.exe -print -printer "My Printer Name" c:\sample.pdf
```

### To View a List of Command Line Options

To view a list of command line options printed to standard out please start:

```
SignDoc32 cmd.exe -help
```

### **Examples**

```
SignDoc32_cmd.exe -help
SignDoc32_cmd.exe -?
```

See the chapter <u>Signing a Document</u> describing the first steps of usage of a SignDoc Desktop application.

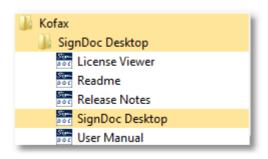
# 4.2 Signing a Document

# **A** IMPORTANT NOTE

Please ensure a supported signature capture device is connected to the computer and is properly installed.

1. Start the SignDoc Desktop application from the **Start** menu by selecting:

Start > Programs > Kofax > SignDoc Desktop > SignDoc Desktop



2. Open a PDF or TIFF from the menu bar with:

### File > Open

or use the sidebar icon Open.

- - X SOFTPRO\_Example\_Document.pdf - SignDoc Desktop File Help SOFTPRO\_Example\_Document.pdf Page 1 of 2 SOFTPRO **Contract of Sale STAMP** THE SIGNATURE PROFESSIONALS , hereinafter referred to as Seller, and \_\_\_ referred to as Buyer, hereby agree on this \_\_\_\_ day of \_\_\_\_\_, in the year \_\_\_ to the following terms. A. Identities of the Parties Seller, whose business address is \_\_\_\_\_ \_\_\_\_\_. Buyer, whose business address is \_\_\_\_\_

3. The document will be displayed in the SignDoc Desktop application:

4. You can insert signature fields automatically or manually into a document.

\_, country of \_\_\_

If the **automatic signature field insertion** has been pre-configured in the configuration file **SDAutoPrepare.ini** 

C:\Program Files\Kofax\SignDocDesktop\config\SDAutoPrepare.ini

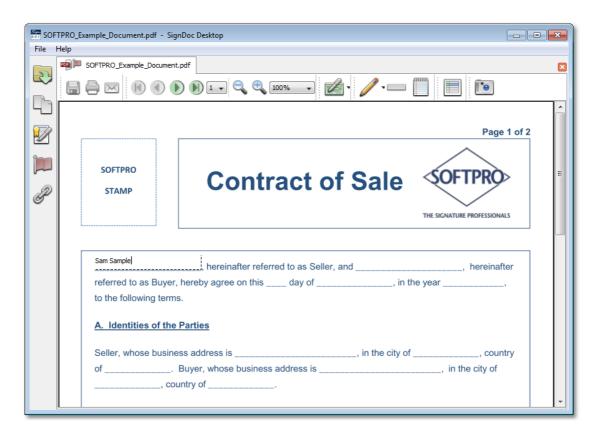
the signature fields will be auto-inserted into the document while it is being opened. Please see the chapter <u>SDAutoprepare.ini</u> for more information about how to configure the automatic signature field insertion.

5. You may also **insert the signature fields manually** by clicking the toolbar icon **lnsert signature field** and placing the signature field into the desired location within the document with a second mouse click. The size and the position of the signature field can be changed also using the mouse.

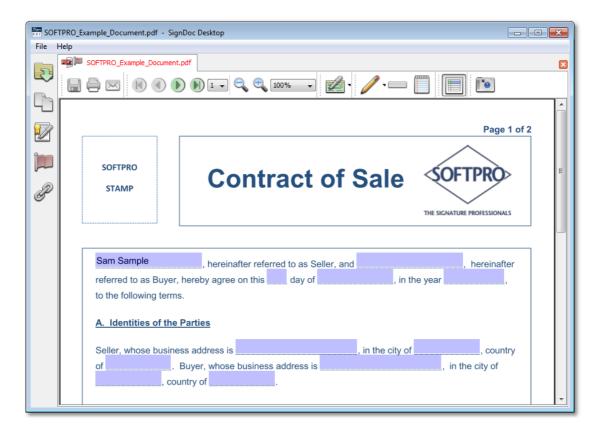
6. By clicking the sidebar icon **Signatures** it is possible to show or hide the list of the signed and unsigned digital signature fields that are available in the document. Each signature field also indicates the page number where the signature field is located. The picture below shows an example of the document with unsigned signature fields.



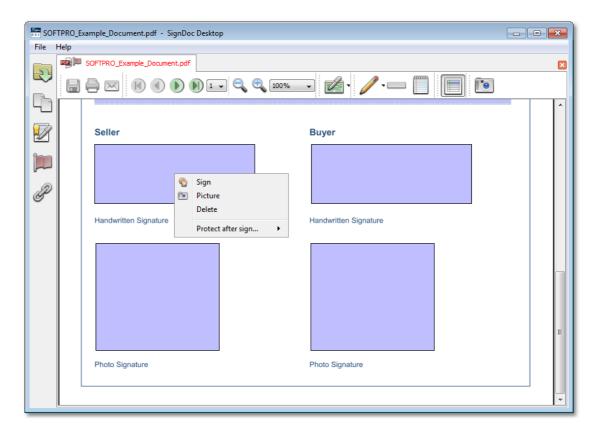
7. With SignDoc Desktop you can edit the PDF documents with **text fields** and **check boxes**. Click with the mouse on the field and enter the data into the field.



8. Navigating in a PDF document can be easier if you highlight the editable fields using the toolbar icon **Highlighting of form fields**. All the editable fields will be displayed as on the picture below.



9. To start the signing process, please move the mouse over the signature field that you would like to sign. In the context menu, that will appear, please click **Sign**. You can put focus on a signature field by selecting it from the **Digital Signature Fields** list on the sidebar. Alternatively you can double-click on the signature field, directly in the list.



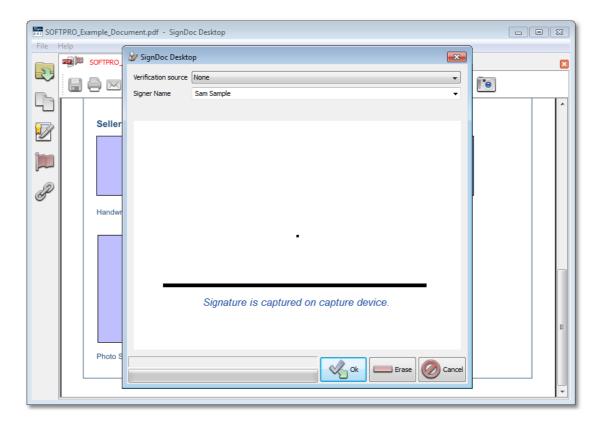
10. The signature capture dialog will be shown.

# ✓ NOTE

When multiple supported signature capture devices are connected to the computer, all devices will be used by default.

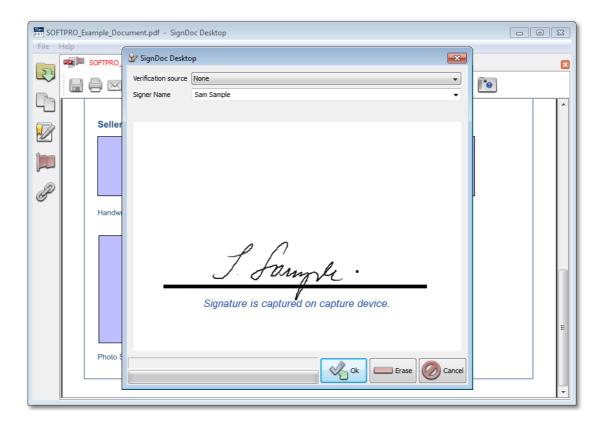
The signature capture dialog will display the input from the most recent active capture device.

When the  ${\bf OK}$  button is clicked on the signature capture dialog, the signature displayed in the dialog with be captured.

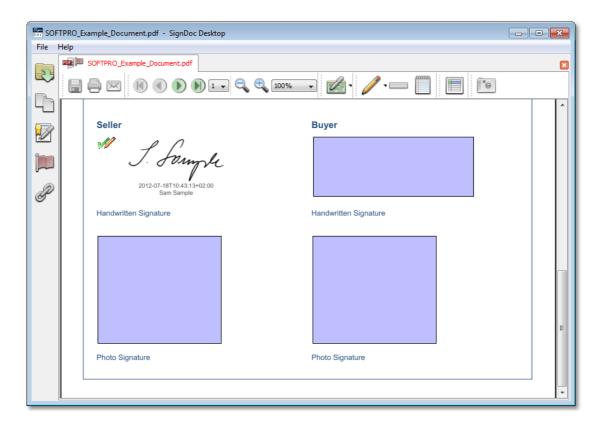


11. In the signature capture dialog, please specify the signer name in the text field **Signer Name**.

12. Sign on the signature capture device. Click the button **OK** to confirm the signature or click **Erase** to re-enter the signature. Clicking **Cancel** the signing ceremony will be aborted and signature capture dialog will be closed.



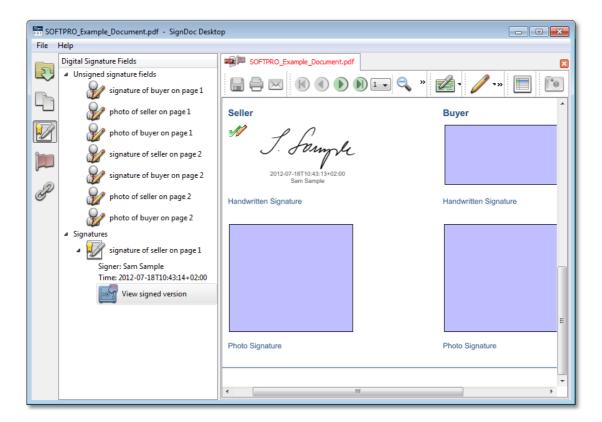
13. After clicking **OK** the signature will be inserted into the document as shown on the picture below.



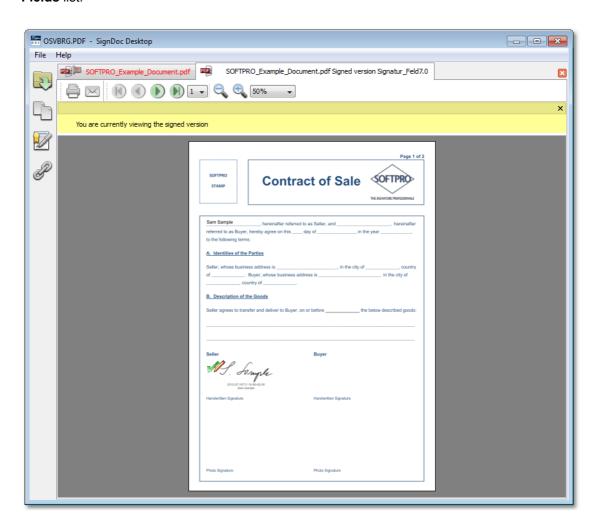
- 14. Now the **Digital Signature Field** list will display the inserted signature under the **Signatures** group.
- 15. When clicking on **Signatures** in the **Digital Signature Fields** list there will be additional information displayed, such as **Signer** and **Time**. In addition a version of a document as it has been signed will be saved below the corresponding signature field.

# **✓** NOTE

Signer name and date is not visible in digital signature appearance for TIFF documents.



16. A signed version of the current document can be viewed at any time, by double-clicking the icon View signed version below the corresponding signature in the Digital Signature Fields list.



17. Once all signatures are captured it is possible to send the signed document to a pre-configured

folder, using toolbar icon Save and Close. SignDoc Desktop can be configured to validate the necessary (minimum) number of the signatures required before the document is sent to the output folder. The configuration for the output folder can be done in the configuration file SignDoc2.ini, which is available by default in the folder:

C:\Program Files\Kofax\SignDocDesktop\config\SignDoc2.ini

Please see chapter Save and close document for more information.

18. By the default, once the document has been sent to the output folder using the toolbar icon

Save and Close, the SignDoc Desktop application will be closed.

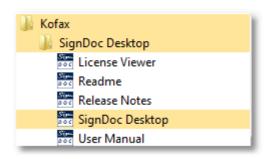
# 4.3 Inserting a Picture into a Document

# ✓ NOTE

Please ensure a supported signature capture device is connected to the computer and is properly installed.

1. Start the SignDoc Desktop application by selecting:

Start > Programs > Kofax > SignDoc Desktop > SignDoc Desktop

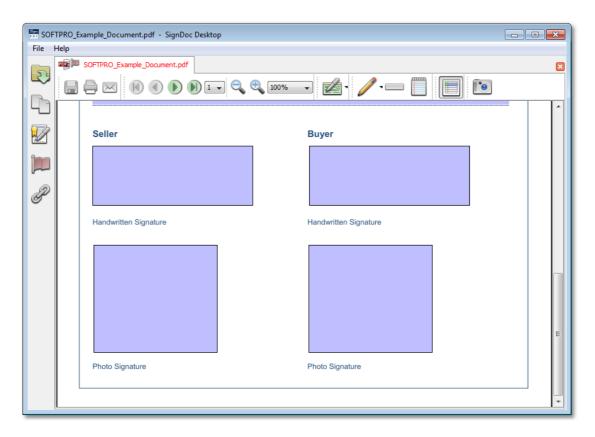


2. To open a PDF or TIFF file, please select from the menu bar:

### File > Open

or use the sidebar icon Open.

3. The document will be displayed in the SignDoc Desktop application:



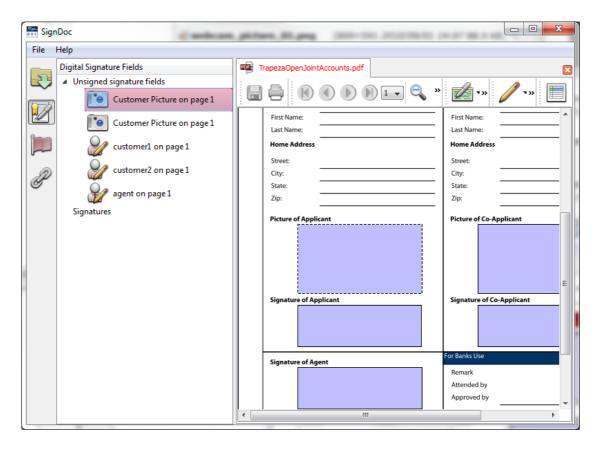
4. If the **automatic signature field insertion** has been pre-configured in the configuration file **SDAutoPrepare.ini** 

C:\Program Files\Kofax\SignDocDesktop\config\SDAutoPrepare.ini

the signature fields will be auto-inserted into the document while it is being opened. Please see the chapter <u>SDAutoprepare.ini</u> for more information about how to configure the automatic signature field insertion.

5. You may also **insert the signature fields manually** by clicking the toolbar icon **lnsert signature field** and placing the signature field into the desired location within the document with a second mouse click. The size and the position of the signature field can be changed also using the mouse.

6. By clicking the sidebar icon **Signatures** it is possible to show or hide the list of the signed and unsigned digital signature fields that are available in the document. Each signature field also indicates the page number where the signature field is located.



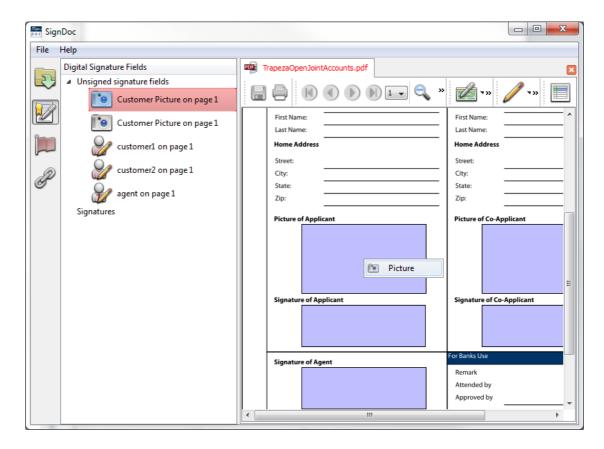
7. To insert a picture, please move the mouse over the desired signature field.

The menu will appear and you can select **Picture**. You can put focus on a signature field by selecting it from the **Digital Signature Fields** list on the sidebar.

If the **Picture** option is not visible in the context menu, please check your configuration file <a href="SignDoc.ini">SignDoc.ini</a>. In the **[Signing]** section of this file, the **Capture** setting should include <a href="sign\_with\_image">sign\_with\_image</a>:

Capture=sign\_with\_signware,sign\_with\_image

If signature field was inserted using <u>SDAutoprepare.ini</u> it is possible that there was an error there.



8. The webcam capture dialog will be shown, you can optionally specify a name in the text field.



9. Click the button **Preview** to take a picture. When you are satisfied with the picture click the **OK** button. Clicking the **Cancel** button aborts the webcam capture dialog.

- - X SignDoc SignDoc File Help TrapezaOpenJointAccounts.pdf 100% 🕶 Home Address Home Address Street: Street: City: City: State: form1[0].SPFID\_AOPN\_DEMO\_SPFID[0].SPFID\_A\_State\_SPFID[0] Zip: **Picture of Applicant** Picture of Co-Applicant Signature of Applicant Signature of Co-Applicant

10. After clicking **OK** the picture will be inserted into the document as shown below.

# 4.4 SignDoc Desktop Toolbar

SignDoc Desktop Toolbar and Sidebar Icons

Signature of Agent

**Open Document** 

**Digital Signature Fields List** 

**Preview Document Pages** 

Viewing Incomplete Mandatory Fields

**Save Document** 

**Print Document** 

**Email Document as Attachment** 

**Navigate Document** 

**Zoom Document** 

**Insert Signature Fields** 

Save and Close Document

**Cancel Transaction** 

Scribble and Annotate

<u>Eraser</u>

**Document Comments** 

**Highlight Fields** 

**Adding Document Attachments** 

**Creating Attachments** 

Prevent Changes to Document after Signing

# 4.4.1 SignDoc Desktop Toolbar and Sidebar Icons

This chapter provides a description of all available SignDoc Desktop toolbar and sidebar icons.



SignDoc Desktop starts with a default setting for the display of the icons in the toolbar and sidebar.

If you prefer not to display some of the icons within your solution, it can be configured in the SignDoc2.ini configuration file. Please see the chapter <u>SignDoc2.ini</u> for more information.

#### Icons in the sidebar:

Icon	Name and Shortcut	Clicking this icon results in
	Close current tab Shortcut: Ctrl + W	Close the currently selected tab.
	Next tab Shortcut: Ctrl + Page Down	Switch to the next tab.
	Previous tab Shortcut: Ctrl + Page Up	Switch to the next tab.
	Open Shortcut: Ctrl + O	Opening the file selection dialogue box. Choose the document which you want to open in SignDoc Desktop.
	Page preview	Display a preview pane of all pages contained in the currently active document
	Signatures	Display signature fields list on the left side of the SignDoc Desktop window
	Incomplete fields	View mandatory fields that have not been completed
P	Attachments	Open the file attachment dialog

# Icons in the toolbar:

Icon	Name and Shortcut	Clicking this icon results in
	Save Shortcut: Ctrl + S	Saving the document
	Print	The document to be printed is sent directly to the printer and printed. Before printing, no print menu opens.
$\bowtie$	Email document as attachment	Send the document as email attachment
M	First page	Display the first page of the document
•	Previous page	Display the previous page of the document
	Next page	Display the next page of the document
	Last page	Display the last page of the document
1 🔻	Select a page	Jumping to any page of the document. Select the requested page number from the drop down list.
Q	Zoom out	Decrease magnification of current page ("zoom out")
<b>e</b>	Zoom in	Increase magnification of current page ("zoom in")
100% ▼	Select zoom in %	Selecting the preferred zoom in %
	Insert signature field	Inserting a signature field into the document
	Save and close	Sending the document to a pre-configured folder and close
	Cancel transaction	Abortion of document processing
	Pencil	Use the pen to add handwritten notes, sketches, annotations (scribbling)
	Eraser	Erase the handwritten notes
	Comment	Add or edit document comments
	Highlighting of form fields	Highlighting of the editable form field (check boxes and text fields) available in the PDF

Icon	Name and Shortcut	Clicking this icon results in
		document
	Capture image and save as document attachment	Adding attachments via scanner or camera

### 4.4.2 Open Document



#### Open

This sidebar icon allows you to quickly open a PDF or TIFF document in the SignDoc Desktop application.

### To open a file:

- click on the sidebar icon Oper
- in the Open dialog browse for the requested file
- click the button Open

By default in the **Open** dialog only PDF files are visible. If you would like to open a TIFF document, please select the corresponding file format TIFF files in the drop-down list.



Use the mouse to drag and drop a PDF or TIFF file into the SignDoc Desktop. Works when dragging the icon on toolbar, sidebar, menu or document tabs.

Alternatively, to open a PDF or TIFF file directly in SignDoc Desktop you may right-click on the preferred file in the Windows Explorer and select **Sign with SignDoc** from the context menu (see <u>Windows Explorer Integration</u>).

# 4.4.3 Digital Signature Fields List

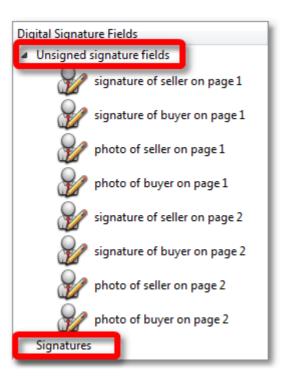


### **Signatures**

Click this sidebar icon to hide or show the digital signature fields list.

The **Digital Signature Fields** list displays fields in two groups:

- Unsigned signature fields
- Signatures



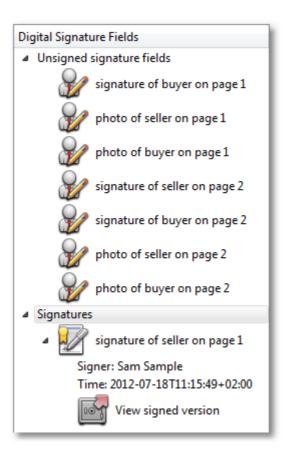
Each signature field is listed with a complete name. Next to the field name a page number, where the corresponding field is located is shown.

Clicking on the signature field in the digital signature field list will result in putting focus on the signature field within the active document. To begin the signing of the signature field directly from the digital signature field list, make a double-click on the preferred signature field.

Once a signature field has been signed the **Digital Signature Fields** list will display the signed field under the **Signatures** group.

Click on the little triangle next to the signature field to view the additional information about the selected signature:

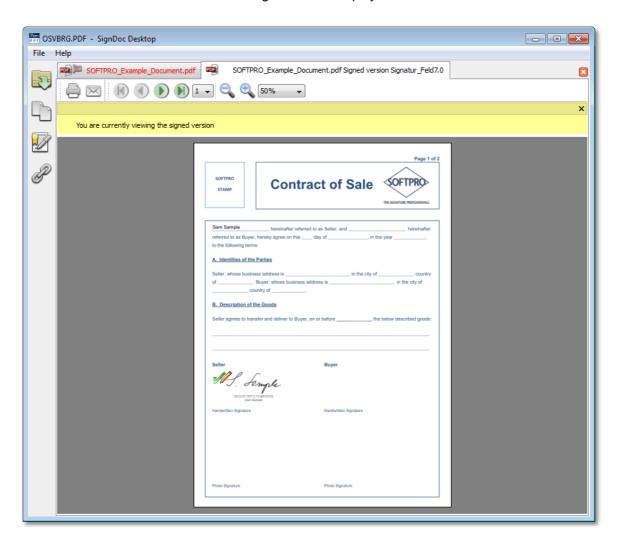
- Signer name
- · Date and time when signature was captured
- Button offering the ability to view the signed version of the document



# **View Signed Version**

With each captured signature a signed version of the document is saved. This helps to save the potentially complex history of the document changes.

To view the signed version of the document for the particular signature simply click this icon **View signed version** below the corresponding signature in the digital signature field list and the version of the document as it has been signed will be displayed.



### 4.4.4 Preview Document Pages



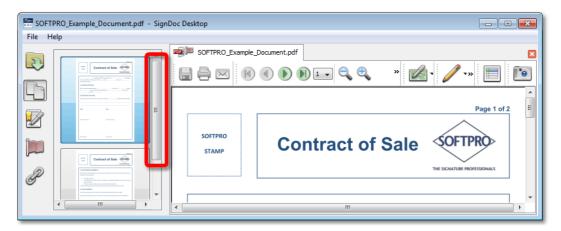
This sidebar icon allows you to quickly see a preview of all pages within the currently active/displayed document and easily jump to specific pages.

To activate the page preview sidebar:

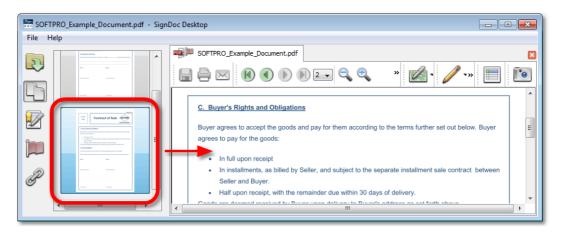
• Click on the sidebar icon Page Preview.



- Once activated, a page preview scrollable sidebar will be displayed showing all of the pages contained within the currently active document. The pages are displayed as small thumbnails, or "previews" of the actual page contents.
- To jump to a specific page scroll to the desired page within the sidebar.



• Click on the desired thumbnail within the page preview sidebar to jump to that specific page.



# ✓ NOTE

Activating the page preview will de-activate any other currently open sidebar.

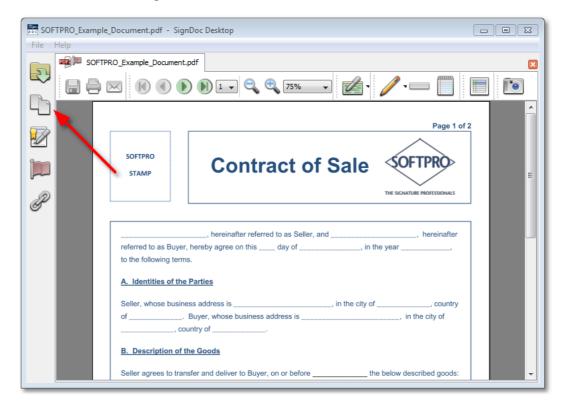
## 4.4.5 Viewing Incomplete Mandatory Fields



This sidebar icon allows you to quickly get an overview of all pages within the currently active/displayed document and easily jump to specific pages.

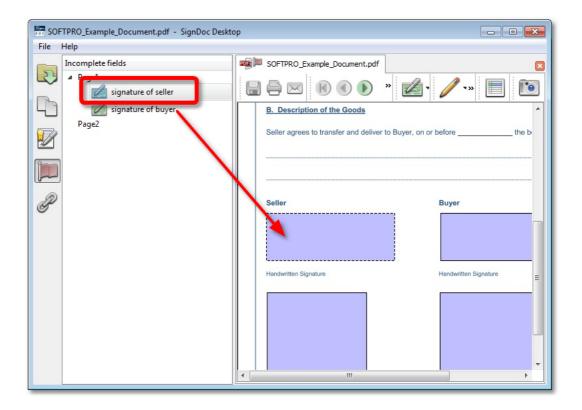
To activate the page preview sidebar:

Click the icon Unsigned fields in the left sidebar.



This will activate the **Incomplete fields** sidebar.

The **Incomplete fields** sidebar lists all of the fields in the document that have not yet been signed thereby providing a simple method of navigating to specific to-be-signed fields. Clicking on any of the signature fields in the list will move the cursor in the main document window to that specific field.



# ✓ NOTE

Activating the **Incomplete fields** sidebar will de-activate any other currently open sidebar.

### 4.4.6 Save Document



Using this toolbar icon the changes made to the active document can be saved.

This icon is disabled when there are no unsaved changes. The **Save** icon will become enabled only when the document has been changed, for example text entered into the text fields or a check box was checked or an annotations added using the **Pencil** tool.

To save the applied changes, select from the menu bar:

### File > Save

or alternatively click the toolbar icon



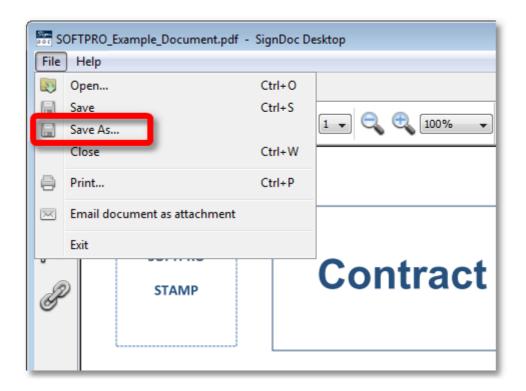
# ✓ NOTE

A document is always automatically saved when the document is signed.

It is also possible to save a document under a different file name or folder location. To do this:

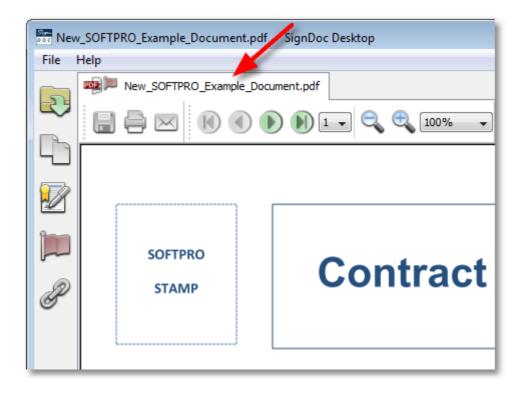
• Select from the menu at the top of the application:

#### File > Save As...



• You will then be prompted for file name and location for the newly saved file.

• The currently open document will be renamed to the new file name you have chosen as indicated on the document tab bar.



#### 4.4.7 Print Document



By clicking on this tool, the document to be printed is sent directly to the printer and printed. Before printing, no print menu opens.

### 4.4.8 Email Document as Attachment

# Email document as attachment

Using this toolbar icon the active document can be sent as email attachment.

# 4.4.9 Navigate Document

When opening a multiple page document in SignDoc Desktop, the document will be opened in the single page view.

The toolbar icons shown below can be used for navigating through the document:

Icon	Name	Description
	First page	Click this icon for quick navigation to the first page.
•	Previous page	Click this icon to switch to the previous page. Alternatively use the keyboard key PAGE UP.
	Next page	Click this icon to switch to the next page. Alternatively use the keyboard key PAGE DOWN.
	Last page	Click on this icon for quick navigation to the last page.
1 🔻	Select page	Lists all the pages that are available in the active document. Select the page which you would like to view from the drop down list.



Using the mouse wheel you can scroll the currently displayed page as well as go to the next or previous page of the document.

#### 4.4.10 Zoom Document

SignDoc Desktop toolbar offers several tools for changing the viewing magnification:

Icon	Name	Description
Q	Zoom out	Click this to decrease magnification of the current page
<b>e</b>	Zoom in	Click this to increase magnification of the current page
100% 🔻	Zoom	Drop down list offers a possibility to select the preferred zoom %

# 4.4.11 Insert Signature Fields



### Insert signature field

This tool can be used to insert the signature fields into a document manually.

To place the signature field in a document:

- Navigate to the page where you would like to insert the signature field
- By clicking the toolbar icon Insert signature field with the mouse, the tool will become activated
- Move the mouse to the location in the document where you would like to place the signature

field

Click on the page to insert the signature field

By the default SignDoc Desktop inserts signature fields of medium size.

If you would like to insert the signature field in a different size, click on the little triangle next to the

icon **Insert signature field**. The selection list as shown below will be displayed:



Switch to the necessary option prior placing the signature field. When placing the signature field with the custom size click once to insert signature fields and keeping the mouse pressed drag to the preferred size.



The size of the signature field can be adjusted using the mouse; Using the mouse pointer you can drag the corners of the signature field to the desired size.

The signature field can also be repositioned within the page by dragging.

**Insert Signature Field** button is disabled after the signing of the first signature field within a TIFF document. All needed signature fields should be inserted first, and only after that they can be signed.

To delete a signature field select **Delete** from the signature field context menu. See the chapter Signature Field Context Menu for more information.

#### 4.4.12 Save and Close Document

- Configuring Location
- Configuring Messages
- Configuring Rules



#### Save and Close

This toolbar icon allows you to save the active document into a pre-configured location (directory or a network share). By default, when clicking this toolbar icon SignDoc Desktop will save the document into the root of the local harddisk (C:\) without applying any additional rules. Once the active document is saved SignDoc Desktop will be closed. There will be no message displayed.

The location as well as some additional rules for document saving can be set in the **SignDoc2.ini** configuration file. All the settings are grouped under the section **[export location]** of the

SignDoc2.ini configuration file. For detailed information about all the settings, please see chapter SignDoc2.ini.

# **Configuring Location**

To change the default location for the document saving, perform following changes:

• Open SignDoc2.ini configuration file. The default location is:

C:\Program Files\Kofax\SignDocDesktop\config\SignDoc2.ini

- Find the section [export\_location.1]
- Change the value for the property export\_location.output\_dir
  - to save a document into a existing directory specify

```
export location.output dir=C:/Directory
```

to save a document onto the network share specify

export\_location.output\_dir//server/output

• save changes to SignDoc2.ini

Once the Save and Close icon is clicked SignDoc Desktop will copy the active document into the location configured in **SignDoc2.ini** configuration file, once that is finished, SignDoc Desktop will be closed without displaying any message.

By default SignDoc Desktop is configured to use only one location for document saving. SignDoc Desktop offers the possibility to configure several locations as backup in the situation the primary location is unavailable.

To enable usage of more then one location, please change the value for the property **export\_location.count** and then configure proper locations below each section **[export\_location.1]** and **[export\_location.2]**.

# ✓ NOTE

When several locations have been configured, SignDoc Desktop will save the active document only to the first successful location.

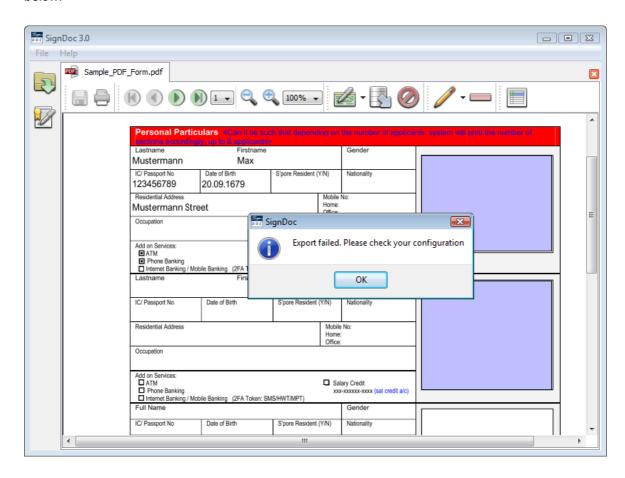
# **A** WARNING

User should have access rights to export to target directory. Exporting to C:/ requires administrator rights.

If there is a file name collision (target file name and path already exists), the file is overwritten **without warning**.

# **Configuring Messages**

If the document saving failed, SignDoc Desktop will display the default error message shown below:



The success and failure messages are also configurable. To configure the specific messages, perform following changes:

- Open the SignDoc2.ini configuration file. The default location is:
  - C:\Program Files\Kofax\SignDocDesktop\config\SignDoc2.ini
- Find the section [export\_location.default]
- Change the value for the property **export\_location.message\_success**, for example:

```
export location.message success="My success message"
```

• Change the value for the property **export\_location.message\_error**, for example:

```
export_location.message_error="My message about not successful
  document storage"
```

• Save changes to SignDoc2.ini

# **Configuring Rules**

### **Check Amount of Signatures**

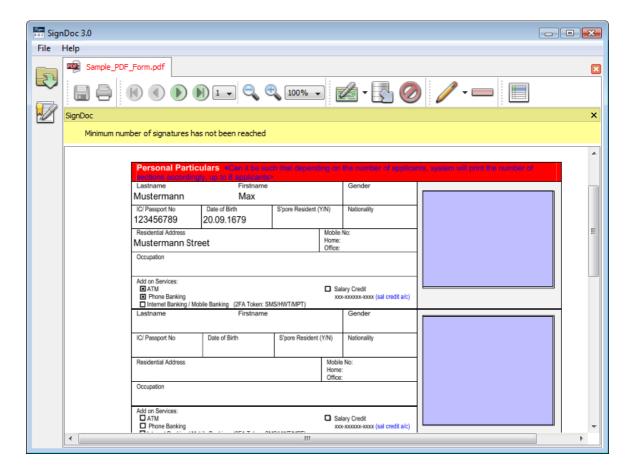
Before the document will be saved into the pre-configured location, it is possible to configure SignDoc Desktop to validate the number of signatures in the active document. To configure, perform following steps:

- Open the SignDoc2.ini configuration file. The default location is:
  - C:\Program Files\Kofax\SignDocDesktop\config\SignDoc2.ini
- Find the section [export\_location]
- Change the value for the property **min\_num\_signatures**, for example:

```
min_num_signatures=1
```

• Save changes to SignDoc2.ini

With a configuration like set in the example above SignDoc Desktop will check if at least one signature is available in the active document before it is saved into the pre-configured location. If the minimum number of the signatures are available, the document will be saved and SignDoc Desktop will be closed. If the minimum number of the signatures is not available, the error message below will be displayed:



### **Move the Document**

By default, when clicking the Save and Close icon a copy of the active document will be saved into the pre-configured location. If you would like to move the active document into the pre-configured folder without keeping a copy of the file in the original directory from where it has been opened, perform following configuration changes:

• Open the SignDoc2.ini configuration file. The default location is:

C:\Program Files\Kofax\SignDocDesktop\config\SignDo2.ini

- Find the section [export\_location]
- Change the value for the property **input\_file\_delete**, for example

```
input file delete=true
```

• Save changes to SignDoc2.ini

### 4.4.13 Cancel Transaction



#### **Cancel Transaction**

This toolbar icon allows you to quickly cancel the document processing without saving.

Once this toolbar icon is clicked the SignDoc Desktop application will be closed. All the unsaved changes done to the active document will be lost.

#### 4.4.14 Scribble and Annotate

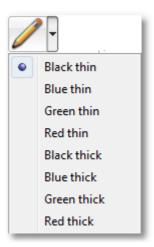


#### Pencil

This toolbar icon allows you to annotate comment or scribble basic drawings within an electronic document.

The pen strokes from Tablet PCs or interactive pen displays or regular mouse are converted into digital ink.

The **Pencil** tool is available in different colors. To select a color, click the little triangle next to the icon and a drop down list as shown below will appear:



Select the preferred color and begin scribbling or annotating on the active document.

To erase the annotation use the **Eraser** tool.



This feature is not supported for TIFF documents.

#### 4.4.15 Eraser



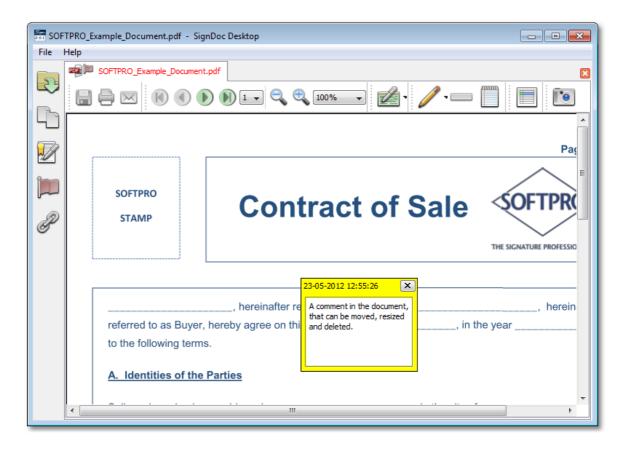
This toolbar icon will allow you to erase annotations and comments that were made in the document using the <a href="Pencil">Pencil</a> tool.

### 4.4.16 Document Comments



This toolbar icon allows you to annotate comments. The comments can be edited later on as well moved and resized.

Click on the icon in the toolbar and create the document comment with the mouse. Press the left mouse button while drawing a rectangle.





This feature is not supported for TIFF documents.

# 4.4.17 Highlight Fields



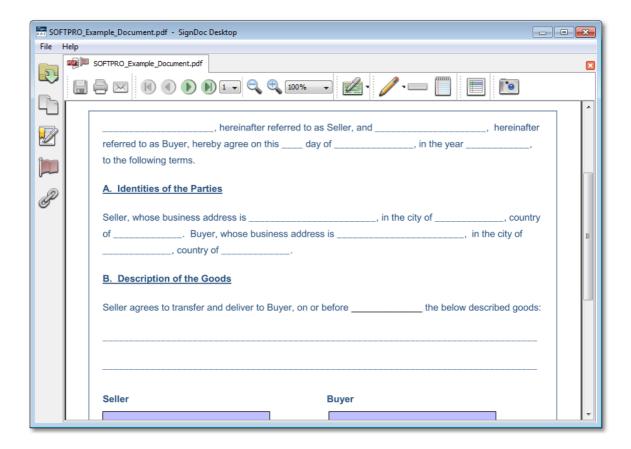
Using this toolbar icon you can highlight the editable form fields that are available in the PDF document.

Supported form fields are:

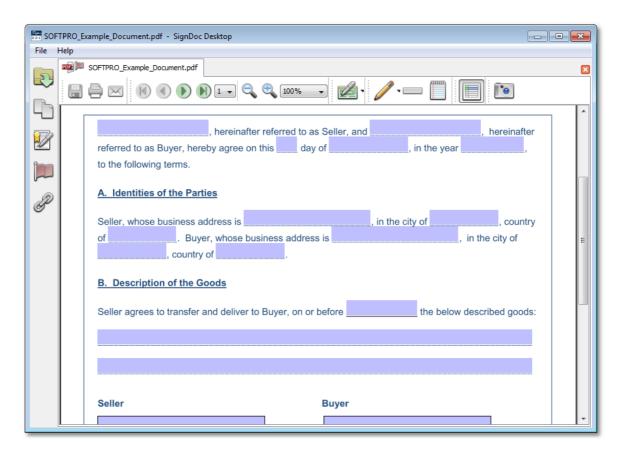
- · text fields
- check boxes

It is not required to highlight the fields to edit them. This icon will help you to quickly identify if a PDF document has editable form fields or not.

By default when opening a PDF document in SignDoc Desktop editable form fields are not highlighted.



Click on the toolbar icon Highlighting of form fields and all the available form fields will appear highlighted as shown on the picture below:





Highlighting fields is disabled for TIFF documents.

### 4.4.18 Adding Document Attachments

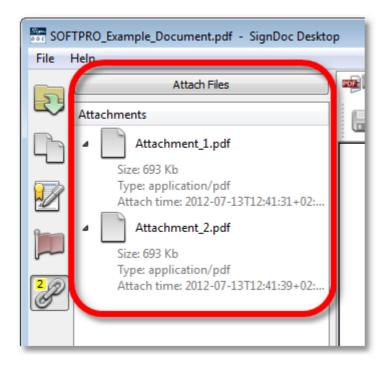
- About Attachments
- Attachment Operations
  - Adding Attachments Method 1: Attach File Button
  - Adding Attachments Method 2: Drag and Drop
  - Viewing attachments
  - Removing Attachments
  - Verifying Attachments
  - Renaming Attachments
  - Saving Attachments elsewhere



#### **Attachments**

This sidebar icon allows you to open the SignDoc Desktop Attachments sidebar.

Once activated the **Attachments** sidebar will be revealed on the left side of the SignDoc Desktop application:



### **About Attachments**

SignDoc Desktop allows the possibility to add any number of additional documents to the one that is currently being signed.

These additional documents are attached to the original one and for the purposes of signing become an integral part of the document that cannot be changed without a tampering being detected. There is no limit to the number of documents that can be attached.

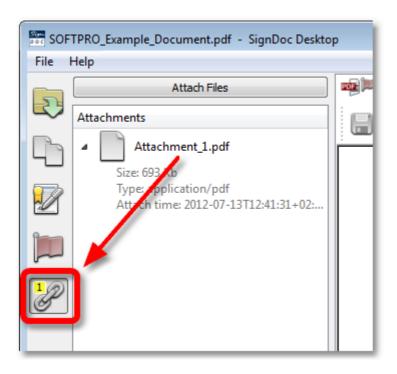
An attachment is bound to the version of the document with which it has been signed with the first signature.



After signing a document you cannot add, rename or remove existing attachments.

Attachments are generally added to a document from the operating system's file system but they can also be added directly from a scanner or camera (see <u>Scanning Attachments</u> for more information).

When attachments are present for the active document, an indicator will appear on the sidebar icon indicating how many attachments are actually present:



✓ NOTE

Activating the **Attachments** sidebar will de-activate any other currently open sidebar.

# **Attachment Operations**

There are several operations associated with attachments that can be performed in SignDoc Desktop. These are:

- Adding attachments
- · Viewing attachments
- · Removing attachments
- · Verifying attachments
- · Renaming attachments
- Saving attachments elsewhere

### **Adding Attachments Method 1: Attach Files Button**

Attachments can be added to the currently active document using the **Attach Files** button within the **Attachments** sidebar.

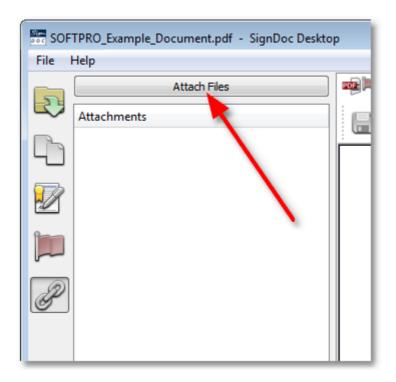
To attach a file to the currently active document using the **Attach Files** button.

Make sure the Attachments sidebar has been activated with the toolbar icon

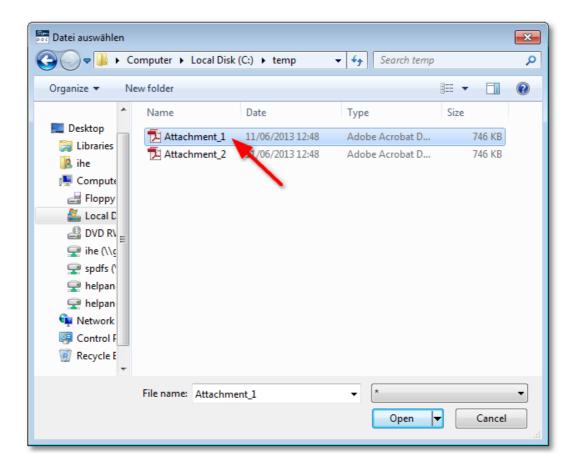


### **Attachments**

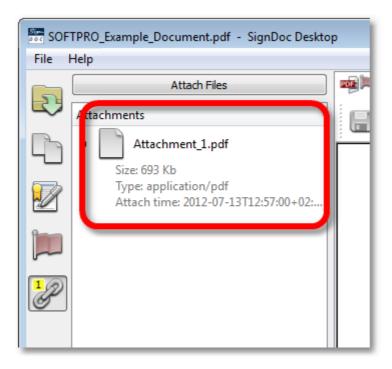
• Click the **Attach Files** button at the top of the **Attachments** sidebar:



• A dialog will appear permitting you to select a file from the file system that you would like to attach. This can be any file. Select it and click the **Open** button:



• The file will now appear in the list of attached files with an indication of its size and the time and date of when it was attached:



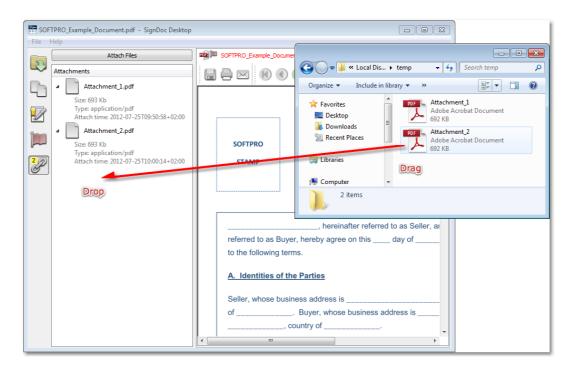
# **Adding Attachments Method 2: Drag and Drop**

Attachments can be added to the currently active document directly via drag and drop. To do this:

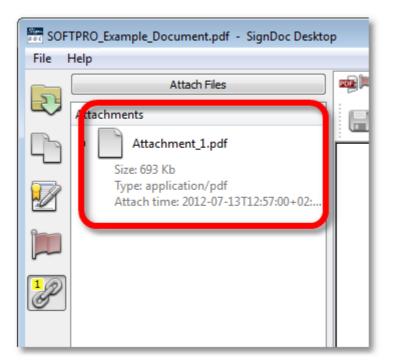
Make sure the Attachments sidebar has been activated with the toolbar icon
 Attachments



• Drag the desired file to be attached directly onto a free space within the sidebar



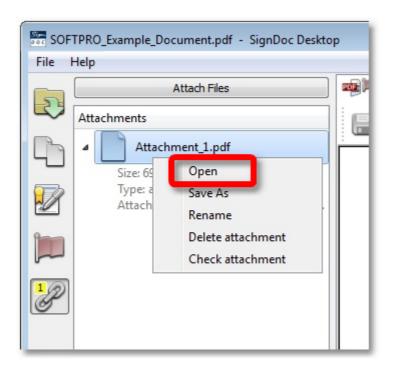
• The file will now appear in the list of attached files with an indication of its size and the time and date of when it was attached:



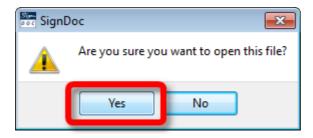
### **Viewing Attachments**

Attachments to the active document can be opened and viewed individually. To do this:

- Select the attachment to be viewed from the Attachments sidebar
- Right-click on the attachment to activate the menu
- Select the **Open** menu item with the left mouse button



• When prompted to open the document, click Yes if you wish to do so



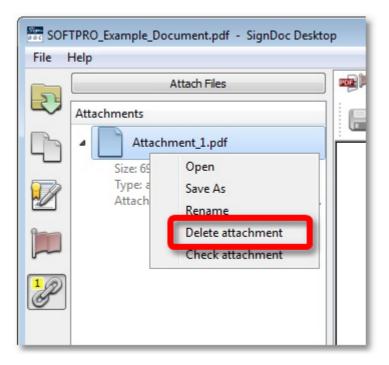
The document will be opened with the default application for the attachment file type

### **Removing Attachments**

Attachments to the active document can be removed from the document. To do this:

- Select the attachment to be viewed from the Attachments sidebar
- Right-click on the attachment to activate the menu

• Select the **Delete attachment** menu item with the left mouse button

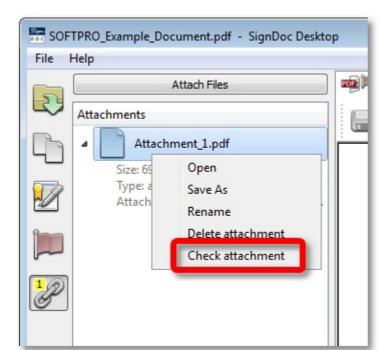


• The attachment will be removed from the document and will no longer be accessible

# **Verifying Attachments**

Attachments to the active document can be verified to ensure that they are not corrupt and are valid. To do this:

- Select the attachment to be viewed from the Attachments sidebar
- Right-click on the attachment to activate the menu



• Select the **Check attachment** menu item with the left mouse button

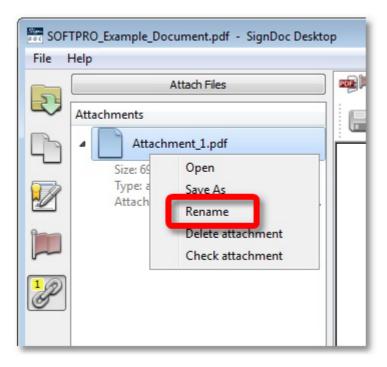
• The attachment will be verified and you will be notified by a popup dialog of whether the file is valid or not.

### **Renaming Attachments**

Attachments may be renamed at any time. The name change will persist such that any time you open the document, the new name will be used for the attachment. To do this:

- Select the attachment to be viewed from the Attachments sidebar
- Right-click on the attachment to activate the menu

• Select the **Rename** menu item with the left mouse button

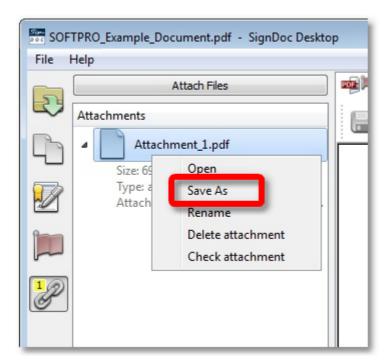


• A cursor will be placed at the position of the name. Start typing the new name for the attachment and press the **Enter** key to complete the operation.

### **Saving Attachments Elsewhere**

It may sometimes be desirable to save an attachment elsewhere for use outside of the document. To do this:

- Select the attachment to be viewed from the **Attachments** sidebar
- Right-click on the attachment to activate the menu



• Select in the menu the Save as option with the left mouse button

You will be prompted to enter a file name and location for the attachment to be saved

### 4.4.19 Creating Attachments

- Adding document attachments via Scanner
- Adding document attachments via Camera

See also **Document Attachments**.



This toolbar icon starts the process for allowing additional documents to be added to the currently active document directly from a camera or scanner.



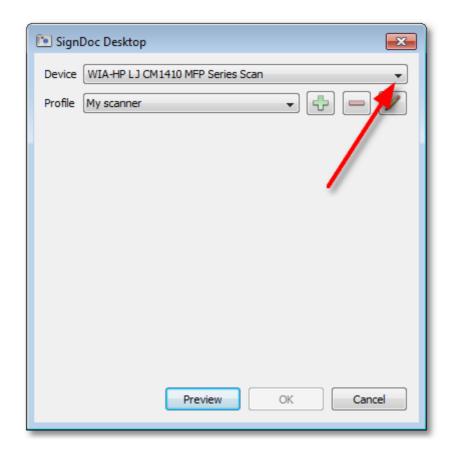
To use this functionality you must have a scanner and/or camera attached to your computer and have the required device software installed.

The capture button is not available when there is at least one signed signature field, in the document. Adding attachments to a PDF document after it is signed corrupts the signature in Adobe Reader.

### **Adding Document Attachments via Scanner**

To add an attachment to the currently active document using a scanner:

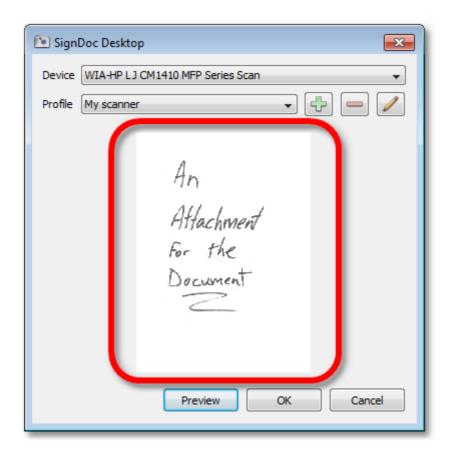
- The document is opened.
- Start the attachment scanner dialog by clicking the Capture image toolbar icon.
- From the attachment scanner dialog select the scanner device from which you would like to capture the attachment. If installed correctly, your scanner device should be available from the Device drop-down list. Activate the drop-down menu and select your scanner.



• Place the document to be used as an attachment in the scanner and click the **Preview** button. This will initiate the scanning process.



Once the scanning has completed, a preview of the document to be attached will be visible
from within the scanning dialog. This allows you to ensure that the document has been
scanned as desired. If you are satisfied with the scanning results, click the **OK** button to add
the attachment to the currently active document.



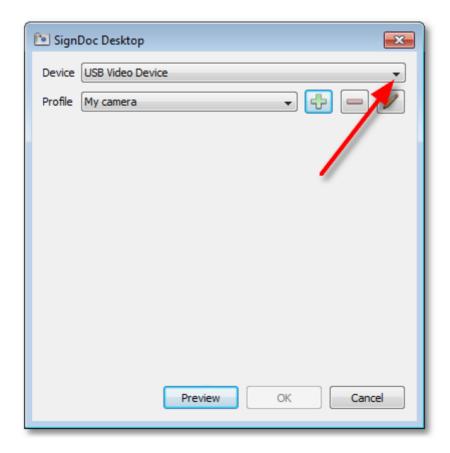
• The attachment is now visible in the **Attachments** sidebar see **Document Attachments** 

# **Adding Document Attachments via Camera**

To add an attachment to the currently active document using a camera:

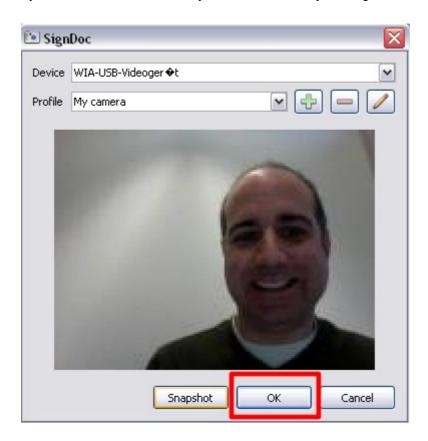
• Start the attachment scanner dialog by clicking the Capture image toolbar icon.

• From the attachment scanner dialog select the camera device from which you would like to capture the attachment. If installed correctly, your camera should be available from the Device drop-down list. Activate the drop-down menu and select your camera.



• When you are ready to take the picture from the camera, click the **Preview** button. This will initiate the camera dialog which will allow you to take several photos. Once you have taken a picture that you are satisfied with, select it by double clicking it.

• The photo you have chosen will now appear as a preview within the scanning dialog. You may now attach it to the currently active document by clicking the **OK** button.



• The attachment is now visible in the **Attachments** sidebar (see Document Attachments)

### 4.4.20 Prevent Changes to Document after Signing

- · Protecting Signature Fields
- Protecting both Signature and Editable Fields

Although the Adobe(R) standard for digital signatures allows the modification of documents after signing as long as an audit trail is kept, it is sometimes desirable to prevent any type of modification to the document after signing (see <u>Digital Signature Fields List</u>).

SignDoc Desktop provides the capability to "freeze" fields after signing so that it is no longer possible to edit them. The effect of protecting fields can be set on a per Signature field basis. i.e. Protection is changed by setting the properties of each individual signature field in the currently active document. Before we describe how to do this, a few definitions are required:

#### **Definition**

Protecting Signature Fields:

Protecting a signature field will have the effect that after the field is signed, the signature can no longer be changed. It cannot be cleared/removed nor can it be re-signed.

#### **Definition**

Protecting Signature Fields and Editable Fields:

Protecting both a signature field and editable fields will have the effect that after the field is signed, the signature can no longer be changed but additionally no other fields in the document can be changed. After such a signature field that has this setting has been signed, the only possible operation is the signing of other fields.

### **Protecting Signature Fields**

To protect a signature field:

- Hover the mouse over the signature field that is to be protected
- Select from the menu Protect after sign... the Signature field option



• Now after that signature field is signed, it will no longer be possible to remove or re-sign it.

# **Protecting both Signature and Editable Fields**

To protect all editable fields and a specific signature field:

- Hover the mouse over the signature field that is to be protected. A menu will appear.
- Select from the menu Protect after sign... the Signature field and editable fields option



• Now after that field is signed, it will no longer be possible to remove or re-sign that field and additionally it will not be possible to edit any of the fields in the document.



Signature field locking is not supported for TIFF documents.

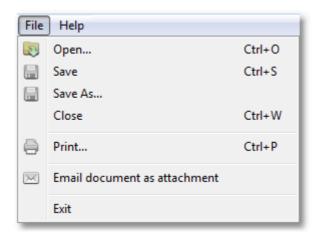
# 4.5 SignDoc Desktop Menu

- Menu File
- Menu Help

In this chapter you will find the description of all the SignDoc Desktop menu items.

### Menu - File

SignDoc Desktop menu File includes following sub-items:



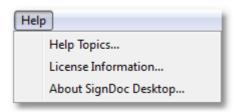
Please find the description of all the sub-items of the **File** menu in the table below:

Menu Item	Shortcut	Description	
Open	Ctrl+O	Open a document	
Save	Ctrl+S	Save changes to the active document	
Save As		Save the document with another name	
Close	Ctrl+W	Close the active document	
Print	Ctrl+P	Enables the display of the print menu of the used default	

Menu Item	Shortcut	Description
		printer. By starting the print function you get a printout of the displayed document.
Email document as attachment		Send the document as an email attachment
Exit		Exit the SignDoc Desktop application

# Menu - Help

The SignDoc Desktop menu **Help** includes following sub-items:



Please find the description of all the sub-items of the **Help** menu in the table below:

Menu Item	Description
Help Topics	Open the user manual
License Information	Check the validity of the SignDoc Desktop license
About SignDoc Desktop	Display the version information about SignDoc Desktop and its modules

# 4.6 Signature Field Context Menu

Moving the mouse over the signature field that is available in the document will result into displaying of the context menu.

Depending on the status of the signature field the context menu will offer different items.

1. Signature field is empty (not signed):



- Select Sign if you would like to sign the selected signature field
- Select **Delete** if you prefer to remove the selected signature field

### ✓ NOTE

Signature fields inserted in the TIFF documents cannot be deleted.

Therefore the context menu for the unsigned signature field in the TIFF document does not include the item Delete.

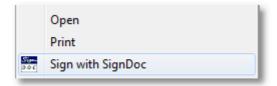
### 2. Signature field is signed:



3. Select **Clear** to remove the signature from the document.

# 4.7 Windows Explorer Integration

It is possible to open documents with SignDoc Desktop right from the Windows Explorer. Right click on a PDF or TIFF document and select **Sign with SignDoc** from the context menu:



# 5 SignDoc Desktop and Sign2Phone

Introduction to Sign2Phone

How to use Sign2Phone

Sign2Phone Administration

Sign2Phone Troubleshooting and FAQ

# 5.1 Introduction to Sign2Phone

### **Smartphone as Pad Alternative**

- Sign2Phone is an App which can be installed on your smartphone.
- It allows you to use your smartphone as a signature capture device.
- The signing application running on your computer detects the smartphone as capture device.
- The connection from smartphone to the computer is protected via Transport Layer Security (TLS) and unique pairing code.
- Sign2Phone App supports iPhone and Android and works with SignDoc Desktop.



### **How it works - Overview**

• The Sign2Phone app is available from the <u>Apple App Store</u> and <u>Google Play Store</u> store and must be installed on the mobile device.

• The app is started on the mobile device by touching the Sign2Phone icon.



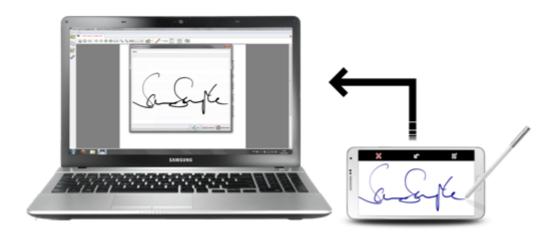
• The app is "paired" with the SignDoc Desktop application via the network.



• While the app is open, clicking on a signature field within the SignDoc Desktop application will initiate a signature capture dialog in the app.



• The signature is captured and transmitted in real-time to the desktop application which places it in the document being signed.



### **Sign2Phone Connectivity**

- In order for Sign2Phone to work, network connectivity is required between the desktop computer where the signature is captured and the mobile device.
- This connectivity is achieved via WiFi i.e. both the desktop and the mobile device should reside on the same network.
- Alternatively, a mobile network can be created and connectivity can be achieved via USB Cable whereby the mobile device must have the mobile personal hotspot functionality enabled.

# 5.2 How to use Sign2Phone

Kofax has implemented a service to locate available devices for signature capturing.

Apple's Bonjour Service is used to discover devices within the local network.



More information about Bonjour Service:

http://www.apple.com/support/bonjour/

Wikipedia: Explanation of Bonjour®

http://en.wikipedia.org/wiki/Bonjour (software)

All discovered devices are displayed in a device selection list displayed by the desktop application. The user selects a device for signature capture.

Make sure that mobile device and PC running desktop application reside on the same network.

### 1. Startup on mobile device

Sign2Phone App is available as free download from the <u>Apple App Store</u> and <u>Google Play Store</u>. The app is started by touching the Sign2Phone icon



### on the device:



This will start the app used for capturing the signature.

### 2. Pairing procedure

Upon first start, a dialog offers the user the possibility to select the device that should be used to capture the signature.



Select a device and click Next.

Now on the selected device (smartphone) the pairing code is displayed.

The desktop application will open a new dialog where you are prompted to enter this pairing code.

Type this pairing code in the white box.

By default the pairing code is stored and can be used for subsequent signatures. Remove the check mark in front of **Save pairing code persistently** if you do not want to save this pairing code.



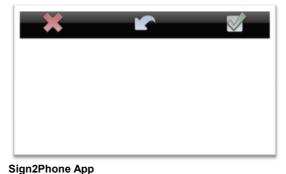
Click **Next** to create a connection with the signature capturing device.



#### 3. Signing procedure

While the app is open, clicking on a signature field within the SignDoc Desktop application initiates a signature capture dialog on both the mobile device and the desktop application.





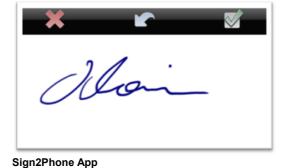
SignDoc Desktop

### 4. Signature Capture

The signature is captured and transmitted in real-time to the desktop application which places it in the document being signed.

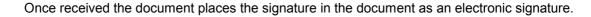
The signature is encrypted before transmitting the signature so that it can not be read or tampered with.

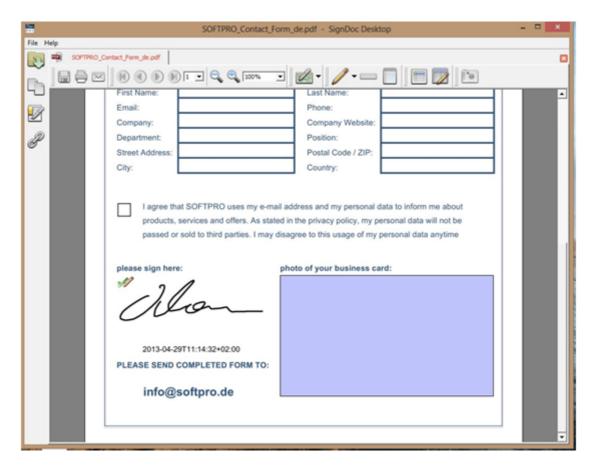




#### 5. Signed document

SignDoc Desktop





If you want to capture another signature, a dialog displays a list of devices. Already connected devices are marked.



If you want to change the pairing code for the paired device, touch the icon smartphone.







Sign2Phone Android

Sign2Phone iOS

A new pairing code is created and can be entered in the desktop application.



## ✓ NOTE

The icon is displayed if the protocol is incompatible, i.e. either the application or the driver SP\_RemoteDrv.dll must be updated.



### 5.3 Sign2Phone Administration

### Configuration

If SignDoc Desktop should use mobile devices as the only device for signature capturing you can define this in the SignDoc Desktop configuration file. To do this set (see <a href="signdoc2.ini">signdoc2.ini</a>):

SigningCeremony.SignatureCapture.Device.Class=SPTabletRemoteTablet

#### Connectivity

A prerequisite to use Sign2Phone with SignDoc Desktop is, that the mobile device and the PC are on the same network.

We recommend using an existing WiFi infrastructure to connect your mobile device with your SignDoc Desktop installation. Make sure your PC and mobile device reside on the same network.

Nevertheless it is possible to set up local network environment between your mobile device and your computer on which SignDoc Desktop is installed.

There are 3 possibilities to set up such local network environment (depending on your mobile device and your mobile contract).

Establish connectivity between PC and mobile device - via Wi-Fi or USB Cable or Bluetooth:

- WiFi: Enable personal hotspot functionality on your mobile device and connect your computer to this WiFi
- USB Cable: Enable personal hotspot functionality on your mobile device and use the USB cable to connect to your computer
- Bluetooth: Enable personal hotspot functionality on your mobile device and connect it to your

computer via Bluetooth

The mobile device communicates with the desktop application via TCP Port 46998 and UDP Port 5353 (service name is sp-remotetablet). A secure connection can be established by limiting the mobile device connectivity to only that port. All other ports may be blocked for security. This will enable a secure solution via WiFi between the mobile devices and the desktop application.

### 5.4 Sign2Phone Troubleshooting and FAQ

### **Troubleshooting**

1. How to enable the current instance to perform a new paring?

You have two options:

- Option 1: Close App, start the App again
- Option 2: Refresh the pairing code

# 2. Which network protocol needs to be used when desktop application is running on Virtual Machine?

• Virtual machines have to use "Bridged Networking", the "NAT" network type does not work

#### 3. My Smartphone is not displayed in the device selection list, what can I do?

- Please make sure that your mobile device and the Windows PC running e.g SignDoc Desktop are on the same network.
- Please start the app "Sign2Phone" on your mobile device again and check if your device is displayed in the list.
  - o If not, please close SignDoc Desktop and start the desktop application again.
  - Now your mobile device should be listed.

### **FAQ**

### 1. How can I connect my PC to my iOS device?

 You can connect your devices via Personal Hotspot to your iPhone, iPad, or iPad mini in several ways.

Find more information in section "Connect your device" on the website Apple Support.

#### 2. How can I use Sign2Phone when I am not in my home country?

- Enabling the Tethering will not work unless the data roaming is enabled.
- This is relevant if you are using your Smartphone outside your home country.
- Data roaming may incur extra charges from your provider telephone.

### 6 Tools

SOFTPRO Printer Driver
Converting PDF into TIFF

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### 6.1 SOFTPRO Printer Driver

During SignDoc Desktop installation the option to install the feature **PDF Printer Driver 32-bit** or **PDF Printer Driver 64-bit** is offered. This feature enables the possibility to convert the documents created in the other applications into a PDF or TIFF format. Once conversion process is finished the document will be automatically opened in SignDoc Desktop application for signing procedure.

When this feature is installed on the computer, you will find the **SOFTPRO PDF Printer** in the list of the available printers.



To convert a document into a PDF format, please follow the steps:

- Select the menu Print in the application where the document is created.
- In the list of the available printers on the computer, select SOFTPRO PDF Printer
- If it is necessary to configure the printing preferences, click the button **Properties**
- Click **OK** to begin the printing process
- The document will be converted and opened in the SignDocDesktop application
- If SignDoc Desktop application has been configured to autoinsert the signature fields into the document there will be the fields already available for signing.
- Please see the chapter <a href="SDAutoPrepare.ini">SDAutoPrepare.ini</a> to learn about the configuration.
- Now the document can be signed. See the chapter Signing a document.

# **SOFTPRO PDF Printer Printing Preferences**

SOFTPRO PDF Printer allows to configure the printing preferences. To access the preferences dialog, please select **SOFTPRO PDF Printer** in the available printer list and click the button **Properties**.

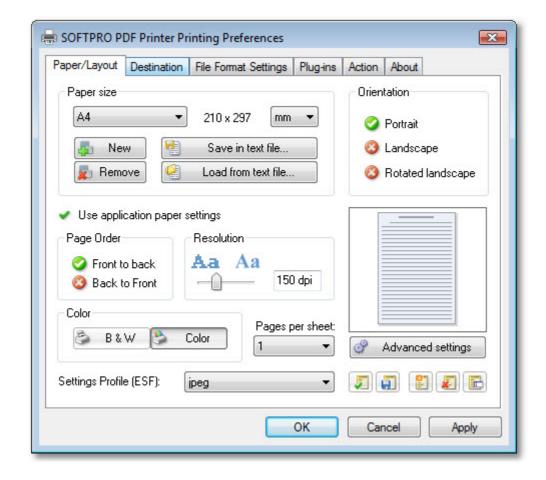
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### **Printing Preferences** dialog contains following tab panels:

• Paper/Layout - use this panel to select the paper size and orientation as well as resolution etc.

Default settings:

- o Paper size A4
- o Resolution 150 dpi

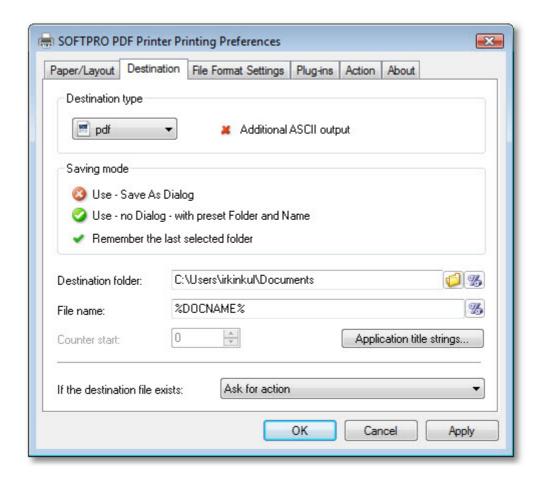


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• **Destination** - use this tab panel to specify the destination type, saving mode and destination folder etc.

Default settings:

- o Destination type pdf
- o Destination folder Documents folder of the current user

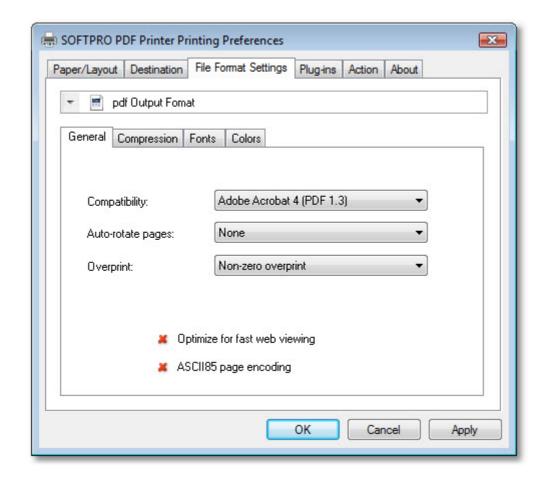


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• File Format Settings - in this tab panel please select the file format settings, compression etc.

Default settings:

- o Output format pdf
- o Compression B & W images compress: CCITT Group 4



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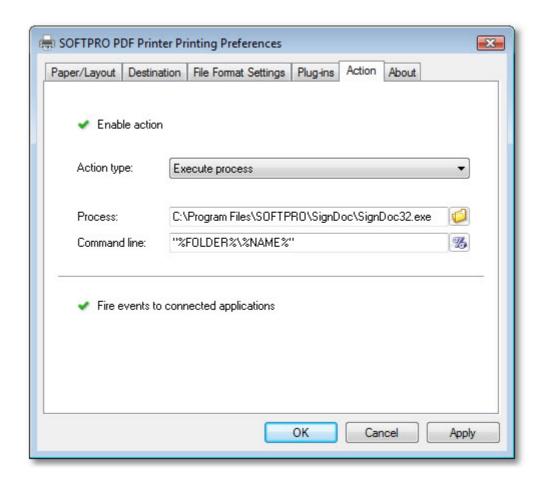
• Plug-ins - if exists, plugins for chain processing can be enabled here



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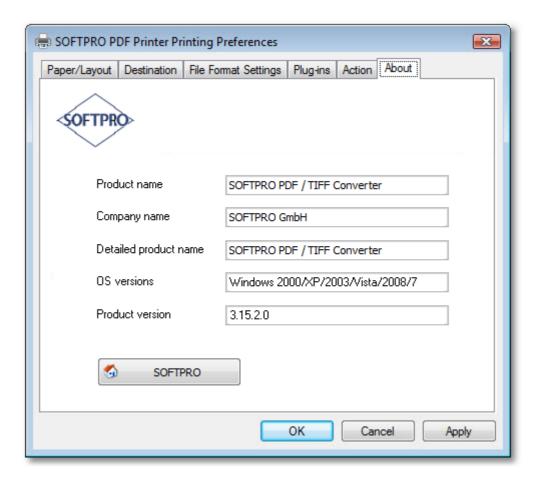
Action - use this tab panel to specify the action that will be executed after conversion.
 Default settings:

o Action to execute SignDoc Desktop application is enabled



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• About - Information about the product is displayed here



# 6.2 Converting PDF into TIFF

- Options supported by SPSD2TIFF
- Example

A command line tool **SPSD2TIFF.exe** can be used to convert PDF documents to TIFF images. If the PDF document contains the signature fields all the unsigned signature fields will be copied to the TIFF document as well. Signature fields must not overlap and must be contained completely within their page. When converting various parameters can be set. This chapter provides description of the usage of the **SPSD2TIFF.exe** including all the supported options.

Please start the command line (**run > cmd**) and execute the command tool **SPSD2TIFF.exe**. The tool can be found in the SignDoc Desktop installation directory:

C:\Program Files (x86)\Common Files\SOFTPRO\Shared

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The usage information of the tool will be shown.

```
C:\Program Files\SOFTPRO\SignDoc>SPSD2TIFF.exe
SPSD2TIFF 1.0 - Copyright (c) 2009 SOFTPRO GmbH

Usage:
SPSD2TIFF [SWITCHES] INPUT_FILE OUTPUT_FILE

Switches:
-bw
-compression COMPRESSION
-dpi DPI
-invisible

Compression:
group4, LZW, RLE, or ZIP
```

# **Options Supported by SPSD2TIFF**

SPSD2TIFF is invoked this way:

```
SPSD2TIFF SWITCHES INPUT OUTPUT
```

*INPUT* is the pathname of the input file (PDF or TIFF), *OUTPUT* is the pathname of the desired output file (TIFF). The pathnames will be used as specified; no default extension will be added.

The following switches are available:

Switch	Description	
-bw	Convert to black and white (1 bit per pixel)	
-c C	See -compression C	
-compression C	Set the compression method for the output file. If this switch is not specified, the output file will be uncompressed (and can therefore become quite large). Available values for C are:	
	<ul> <li>group4 CCITT Group 4 (Fax), implies switch -bw</li> </ul>	
	LZW Lempel, Ziv und Welch	
	RLE run-length encoding (Packbits)	
	ZIP Adobe Deflate	
-d N	See -dpi N	
-dpi N	Set the resolution of the output document to N DPI (dots per inch). This switch must be used if the input file is a PDF document. If -dpi is not specified, the resolution of the input file will be used.	
-i	See -invisible	
-invisible	Create invisible fields	

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#### SPSD2TIFF.exe returns one of these codes:

- 0 conversion successful
- 1 command line error
- · 2 fatal error

### **Example**

The example below shows how to convert a PDF document to TIFF image with 200dpi and fax group4 compression:

```
SPSD2TIFF.exe -compression group4 -dpi 200 C:\Sample_PDF.pdf C:
\Sample TIFF.tiff
```

The following result will be displayed in the command line:

```
Document converted.

Number of pages: 2

Number of unsigned signature fields copied: 2

Number of signed signature fields omitted: 0
```

After conversion you may open a TIFF document in the **SignDoc Desktop** using following command:

```
SignDoc32.exe C:\Sample_TIFF.tiff
or
SignDoc32 cmd.exe C:\Sample TIFF.tiff
```



Signature fields in the TIFF images are not moveable after saved.

# 7 Configuring SignDoc Desktop

SignDoc Desktop Configuration Files

SDAutoPrepare.ini

SignDoc2.ini

**Date and Time Formatting** 

**Font Configuration** 

# 7.1 SignDoc Desktop Configuration Files

SignDoc Desktop reads the following configuration files:

- SignDoc2.ini
- SDAutoPrepare.ini
- Signature Capture background
- Font Configuration

SignDoc Desktop installs these configuration files in the installation folder. The default location is:

```
C:\Program Files\Kofax\SignDocDesktop\config
```

User specific files can also be loaded relative to the *%APPDATA%* environmental variable:

```
%APPDATA%/SOFTPRO/SignDoc/config
```

The user specific location is searched prior to the installation folder.

Typically on windows

Microsoft Windows 7 and Windows 8 / 8.1:

```
C:\Users\<username>\AppData\Roaming\SOFTPRO\SignDoc\config
```

To check the exact location of the application and user configuration files select from the menu bar:

Help > About SignDoc...

### SignDoc2.ini

SignDoc2.ini configuration file allows configuring the following:

- Visibility of the elements of the graphic user interface (GUI), toolbar icons, sidebar icons and menu items
- Set the language of the application
- Configure some additional parameters like configuration of the export locations for the signed document
- · More configurations

For the detail description, please see the chapter SignDoc2.ini.

### SDAutoPrepare.ini

**SDAutoPrepare.ini** configuration file offers a possibility to pre-configure the automatic insertion of the signature fields at specified text positions within the PDF document. Signature field size and offset can be configured. When configured the signature fields can be auto-inserted in the PDF document when the PDF document will be opened in SignDoc Desktop application.

Please see the chapter <u>SDAutoprepare.ini</u> for more information about how to configure the automatic signature field insertion.

# **Signature Capture Background**

The signature capture dialog and if available the capture device LCD can be personalized. The configuration files can be found in the SignDoc Desktop installation folder. The default location is:

```
C:\Program Files\Kofax\SignDocDesktop\config
```

The configuration file is selected based on the configured language (see SignDoc2.ini).

```
Background SignDoc <LANG>.xml
```

Example for English:

```
Background SignDoc en.xml
```

The specification for the XML is found in **SPSWObjects.dtd** in the same directory.

# **Font Configuration**

To enable this configuration please update the **fontConfigFile** configuration setting in the **SignDoc2.ini** configuration file.

A font configuration file is an XML document specifying the pathnames of TrueType font files and font substitution rules.

For the detail description, please see the chapter Font Configuration.

# 7.2 SDAutoPrepare.ini

Using **SDAutoPrepare.ini** it is possible to configure SignDoc Desktop to auto-insert signature fields in the PDF document at the moment the PDF document is opened in SignDoc Desktop application.

The AutoPrepare settings allow you to specify a search string and other parameters so that you can specify where to insert the signature field. This procedure is started when a document is opened and will only attempt to insert signature fields into a document when there are no pre-existing signature fields available.

In this chapter you will find:

- the detail description of all SDAutoPrepare.ini configuration file parameters
- an example, showing how to configure the **SDAutoPrepare.ini** to auto-insert signature fields in the document at the predefined text positions.

The newly inserted signature fields are given unique names automatically. The first automatically inserted signature field will be named **DigitalSignatureField\_0**, the second automatically inserted field **DigitalSignatureField\_1**, and so on.



Automatic signature fields insertion using SDAutoPrepare.ini is currently supported only for PDF documents.

For inserting a signature field into a TIFF document, please use an appropriate toolbar icon within the SignDoc Desktop application.

Parameter	Supported Values Default Value	Description
field_list	String, semicolon separated list of unique field IDs  Default: none	A list of field IDs, each ID represents a search and field insertion parameter. Please specify the field IDs.
		Example
		<pre>field_list ="field1;field2"</pre>
[field1]		Section specified in the field_list. Configuration for the first signature field. Enter the field ID in [] as you have defined it in the field_list parameter.
text	String  Default: none	Text that will be searched in the document, where the expected signature field is to be inserted. Each search text field should be unique and non overlapping.
type	signature, check_box,	The type of field to be inserted.

Parameter	Supported Values Default Value	Description
	text	
	Default: signature	
capture	sign_with_signware; sign_with_image Default: sign_with_signware,sig n_with_image	(Optional) A list of capture devices that will be shown in the signature field context menu. The format is comma separated list.  Default behaviour is to show all capture devices in the context menu.
		Example
		"sign_with_signware,sign_with_image"
flags	Comma separated list of flags Supported Values: required Default: none	Flags to set for the inserted signature field. Only the 'required' field is current supported.
start_page	Positive number  Default for PDF: 1	First page from which the search for the specified text string should begin. PDF documents start at page 1.
end_page	Zero or positive number	The search pages up to and including the specified end page. To search until the end of the document specify 0.
x_offset	Number Default: 0	Offset in document points for the signature field to be horizontally shifted right.
y_offset	Number Default: 0	Offset in document points for the signature field to be vertically shifted top.
height	Positive number Default: 0	Height of the signature field in document points.
width	Positive number Default: 0	Width of the signature field in document points.
fix	true; false  Default: false	(Optional) Fix the signature field. User will not be able to reposition, resize or delete the field.
friendlynam e	Text Default: field name	(Optional) Name of the field, which will be displayed in the <b>Digital Signature Fields</b> list.
tooltip	Text Default: field name	(Optional) Tooltip of the field, which will be displayed when the mouse is over the field.
profile	AGENT; CUSTOMER; WEBCAM Default: none	(Optional) Used only with signature fields. Sets the profile for the signature. Use this to specify the icon to display on the signature sidebar and the signature capture device.

Parameter	Supported Values Default Value	Description
		AGENT: Agent icon and sign_with_signware  CUSTOMER: Customer icon and sign_with_signware  WEBCAM: Webcam icon and sign_with_image
lock_after_ sign	self; all_editfields  Default: none	(Optional) Fields to lock (make read only) after signing signature field.  self: locks only the currently signed signature field all_editfields: locks all editable text, check box fields and the currently signed signature field
field_name _prefix	String  Default: none	(Optional) The field name will be prefixed with the specified string.

### **Example of SDAutoPrepare.ini Configuration**

In the example below you can see, a configuration that can be used in **SDAutoPrepare.ini** in order to auto-insert the signature fields in the PDF document at the positions, where the text strings **Dealer** and **Customer** are found.

• Go to the SignDoc Desktop installation folder and open the **SDAutoPrepare.ini** configuration file. The default location is:

C:\Program Files\Kofax\SignDocDesktop\config\SDAutoPrepare.ini

· Apply changes as shown below:

```
[auto insert]
field list="field1; field2"
[field1]
text=Dealer
type=signature
start page=1
end page=0
x offset=0
y_offset=10
height=30
width=150
fix=false
friendlyname=Signature Dealer
[field2]
text=Customer
start_page=1
end_page=0
x offset=0
y offset=10
height=30
width=150
fix=false
friendlyname=Signature Customer
```

- Save changes to **SDAutoPrepare.ini**.
- Start SignDoc Desktop again and load the PDF document that contains the text **Dealer** and **Customer**.
- Signature fields should be auto-inserted on the positions where the texts **Dealer** and **Customer** are found.

# 7.3 SignDoc2.ini

- [General]
- [UserInterface]
- [ImageCapture]
- [Signing]
- [Verification]
- [export location]

In this chapter you will find the detail description of all in **SignDoc2.ini** available parameters.



Please use **forward slashes** "/" whenever a directory path is required.

### [General]

### [General] - General section of the SignDoc2.ini file

Parameter	Supported Values Default Value	Description
title	Enter any name.  Default: SignDoc Desktop	The title will be displayed in the title bar of the SignDoc Desktop application.
language	en; de Default: en	Using this setting it is possible to configure the application language. English, German, Korean, Russian languages are supported.
fontConfigFile	SPFontConfig.xml  Default: Complete PATH to the location of the SPFontConfig.xml file.	Font configuration file(s), comma separated list of font configuration files, please use forward slashes.
print.dpi	Positive integer  Default: 300	The dpi (dots per square inch) for printing

Parameter	Supported Values Default Value	Description
AboutDialog.web site	URL string  Default: www.kofax.com	About SignDoc dialog link URL
Window.startsize	maximize; minimize; default; lastknown Default: lastknown	SignDoc Desktop application window start size
Prepare.JavaScri ptFile	Specify a JavaScript file name. With none the feature is disabled.  Default: none	Prepare a document using a JavaScript file.  If this parameter is used, the specified JavaScript file has to be located in the SignDoc Desktop installation directory.

## [UserInterface]

[UserInterface] - Section to configure visibility of the GUI elements (toolbar and side bar icons as well as the menu items)

Parameter	Supported Values Default Value	Description
SignatureFields.fi xed	true; false  Default: false	This setting specifies if the signature fields will be fixed or not.  If the value set to "true" then the signature fields will not be possible to move, resize or delete.
SignatureFields. ContextMenu.visi ble	true; false  Default: true	Using this setting it is possible to disable the Signature Field Context menu. If the value is set to "false" then the element is disabled.
SignatureFields. ContextMenu.Del ete.visible	true; false  Default: true	This setting specifies if the signature fields context menu item <b>Delete</b> is visible or not.
SignatureFields. ContextMenu.Lo ckAfterSign.visibl e	true; false  Default: true	This setting specifies if the signature fields context menu item <b>Protect after sign</b> is visible or not.
SignatureFields. ContextMenu.Cle ar.visible	true; false  Default: true	This setting specifies if the signature fields context menu item <b>Clear signature</b> is visible or not.
SignatureFields.d ecorations	true; false  Default: true	Using this setting it is possible to hide or show signature field decorations (i.e checkmark, question mark, cross). Not supported in TIFF documents.
WindowSystemB uttons.visible	true; false  Default: true	Using this setting it is possible to hide or make visible the buttons (Minimize, Maximize and Close) that are displayed in the right corner of the

Parameter	Supported Values Default Value	Description
		SignDoc Desktop application title bar.
		If the value set to "true" then the element is visible.
TabBar.visible	true; false  Default: true	Using this setting it is possible to specify if the Tab bar is visible or not.
		If the value set to "true" then the element is visible.
CloseDocument Button.visible	true; false  Default: true	Using this setting it is possible to specify if the Document close button should be visible or not.
		If the value set to "true" then the element is visible.
OpenButton.visib le	true; false  Default: true	Using this setting it is possible to hide or make
		visible the sidebar icon Open.
		If the value set to "true" then the element is visible.
PagesButton.visi ble	true; false	Using this setting it is possible to hide or make
	Delault. true	visible the sidebar icon Pages preview.
		If the value set to "true" then the element is visible.
SignaturesButton .visible	true; false	Using this setting it is possible to hide or make
·VIGIBIC	Default: true	visible the sidebar icon Digital signature fields.
		If the value set to true then the element is visible.
RequiredFieldsB utton.visible	true; false  Default: true	Using this setting it is possible to hide or make
	Derault. true	visible the sidebar icon Incomplete fields.
		If the value set to "true" then the element is visible.
AttachmentsButt on.visible	true; false	Using this setting it is possible to hide or make
	Default: true	visible the sidebar icon Attachments.
		If the value set to "true" then the element is visible.
SaveButton.visibl	true; false	Using this setting it is possible to hide or make
e	Default: true	visible the toolbar icon Save.
		If the value set to true then the element is visible.
PrintButton.visible	true; false	Using this setting it is possible to hide or make
	Default: true	visible the toolbar icon Print.
		If the value set to true then the element is visible.

Parameter	Supported Values Default Value	Description
EmailButton.visib le	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Email document as attachment.  If the value set to true then the element is visible.
FirstPageButton. visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon First page.  If the value set to true then the element is visible.
PrevPageButton. visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Previous page.  If the value set to true then the element is visible.
NextPageButton. visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Next page.  If the value set to true then the element is visible.
LastPageButton. visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Last page.  If the value set to true then the element is visible.
PageSelectCom boButton.visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Select a page.  If the value set to true then the element is visible.
ZoomInButton.vi sible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon <b>Zoom in</b> .  If the value set to true then the element is visible.
ZoomOutButton. visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon <b>Zoom out</b> .  If the value set to true then the element is visible.
ZoomSelectCom boButton.visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon 100% Select zoom in %.  If the value set to true then the element is visible.
InsertSignatureFi eldButton.visible	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Insert signature field.

Parameter	Supported Values Default Value	Description
		If the value set to true then the element is visible.
ExportButton.visi	true; false	Using this setting it is possible to hide or make
	Default: false	visible the toolbar icon Save and Close.
		If the value set to true then the element is visible.
CancelTransacti onButton.visible	true; false	Using this setting it is possible to hide or make
	Default: false	visible the toolbar icon Cancel transaction.
		If the value set to true then the element is visible
DrawButton.visible	,	Using this setting it is possible to hide or make
	Default: true	visible the toolbar icon Pencil.
		If the value set to "true" then the element is visible.
EraseButton.visib	·	Using this setting it is possible to hide or make visible the toolbar icon <b>Eraser</b> .
	Default: true	If the value set to "true" then the element is visible.
NoteButton.visible	true; false	Using this setting it is possible to hide or make
e	Default: true	visible the toolbar icon <b>Comment</b> that allows adding annotations to the document.
		If the value set to "true" then the element is visible.
FieldsButton.visi ble	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Highlighting of form
		fields.  If the value set to "true" then the element is visible.
Attachlmago visi	true: false	
Attachlmage.visi ble	true; false  Default: true	Using this setting it is possible to hide or make visible the toolbar icon Capture image and
		save as document attachment.
		If the value set to "true" then the element is visible.
OpenMenu.visibl e	true; false	This setting defines if the menu item <b>File &gt; Open</b> should be visible or not.
	Delault. Liue	If the value set to "true" then the menu item is visible.
SaveMenu.visible	true; false	This setting defines if the menu item <b>File &gt; Save</b> should be visible or not.
	Default: true	If the value set to "true" then the menu item is visible.

Parameter	Supported Values Default Value	Description
SaveAsMenu.visi ble	true; false  Default: true	This setting defines if the menu item <b>File &gt; Save As</b> should be visible or not.  If the value set to "true" then the menu item is visible.
CloseMenu.visible	true; false  Default: true	This setting defines if the menu item <b>File &gt; Close</b> should be visible or not.  If the value set to "true" then the menu item is visible.
PrintMenu.visible	true; false  Default: true	This setting defines if the menu item <b>File &gt; Print</b> should be visible or not.  If the value set to "true" then the menu item is visible.
EmailMenu.visibl e	true; false  Default: true	This setting defines if the menu item File > Email document as attachment should be visible or not.  If the value set to "true" then the menu item is visible.
ExitMenu.visible	true; false  Default: true	This setting defines if the menu item <b>File &gt; Exit</b> should be visible or not.  If the value set to "true" then the menu item is visible.
HelpTopicsMenu .visible	true; false  Default: true	Using this setting it is possible to hide or make visible the menu item <b>Help &gt; Help Topics</b> .  If the value set to "true" then the element is visible
LicenseInformati onMenu.visible	true; false  Default: true	This setting defines if the menu item <b>Help &gt; License Information</b> should be visible or not.  If the value set to "true" then the menu item is visible.
AboutMenu.visible	true; false  Default: true	This setting defines if the menu item <b>Help &gt; About SignDoc Desktop</b> should be visible or not.  If the value set to "true" then the menu item is visible.

## [Signing]

## [Signing] – Section of the SignDoc2.ini file for configuring the attributes for signing process

Parameter	Supported Values Default Value	Description
Capture	sign_with_signware,	A list of capture devices that will be shown in the

Parameter	Supported Values Default Value	Description
	sign_with_image  Default: sign_with_signware,sign _with_image	signature field context menu. The format is comma separated list, example "sign_with_signware,sign_with_image"
Certificate.selection	SelfSigned; PKCS12; 'CertificateStore Default: SelfSigned	Certificate to digitally sign the document.  If 'PKCS12' is selected please specify the certificate file in Certificate.PKCS12.file.
Certificate.PKCS1 2.file	fully qualified path to the PKCS12 file	Sign the document with a PKCS12 certificate file, please use forward slashes.  Used when Certificate.selection is set to "PKCS12"
Certificate.Certific ateStore.source	hardware,software  Default behavior: hardware,software	Used when Certificate.selection is set to "CertificateStore".  Select only software-based and/or hardware-based certificates.  The format is comma separated list, example "hardware,software".
Certificate.Certific ateStore.FilterCert ificatesBylssuerC ertificateFile	path to the DER encoded certificate file	Used when Certificate.selection is set to "CertificateStore".  DER encoded certificate file, please use forward slashes. Setting this parameter adds the specified DER-encoded certificate to a list of acceptable issuer certificates.  A PDF document may contain (in its certificate seed value dictionaries) additional restrictions for acceptable issuer certificates.  A signer certificate is acceptable for the rule defined by this parameter if it chains up to any of the certificates in the list of acceptable issuer certificates.
Certificate.Certific ateStore.FilterCert ificatesBySubject CertificateFile	path to the DER encoded certificate file	Used when Certificate.selection is set to "CertificateStore".  DER encoded certificate file, please use forward slashes. Setting this parameter adds the specified DER-encoded certificate to a list of acceptable certificates.  A PDF document may contain (in its certificate seed value dictionaries) additional restrictions for acceptable certificates.
Certificate.Certific ateStore.FilterCert ificatesByPolicy	The value must be a valid ASN.1 object identifier.	Used when Certificate.selection is set to "CertificateStore".  A required certificate policy. Setting this parameter adds the specified OID to a list of

Parameter	Supported Values Default Value	Description
		required policy object identifiers. All specified policies are required for a certificate to be accepted.
		A PDF document may contain (in its certificate seed value dictionaries) additional restrictions for acceptable certificates.
Certificate.Certific ateStore.FilterCert ificatesBySubject DN	An acceptable subject Distinguished Name (DN). The DN must be formatted according to RFC 4514, using short names for the attribute	Used when Certificate.selection is set to "CertificateStore".  Setting this parameter adds the specified DN to a list of acceptable DNs. Multi-valued RDNs and multiple RDNs specifying a value for the same
	types.	attribute are not allowed.  A PDF document may contain (in its certificate seed value dictionaries) additional restrictions for acceptable certificates.
SigningCeremony Gui	dialog; document  Default: dialog	User interface to capture the signatures. SignPad is currently the only supported device for the setting "document".
SigningCeremony. SignatureCapture.		The device class that is to be used to capture a signature.
Device.Class		Set the value to "SPTabletRemoteTablet" to only connect to Sign2phone devices.
		"SPTabletInterlink" interface to the SOFTPRO Interlink driver
		"SPTabletMobinetix" interface to Mobinetix driver
		"SPTabletStepOver" interface to StepOver BlueM and BlueM-LCD tablets
		"SPTabletTopaz" interface to Topaz 1X5, 4X3 and 4X5 SE LCD tablets
		"SPTabletWSignPad" interface to Wacom SignPad tablets
		"SPTabletWacom" interface to Wacom Intuos, Graphire, etc. tablets
		"SPTabletWTablet" interface to SOFTPRO elnk driver to access TabletPCs
		"SPTabletVerifone" interface to SOFTPRO driver to access Verifone Mx 800 series tablets
		"SPTabletGeneric" interface to SOFTPRO generic access modules
BiometricSignatur e.minimum	Number>=0 Default: 1	Minimum number of signature vectors for a signature to be accepted. Recommended values: 0 or 1
BiometricSignatur	true; false	Save the biometric signature data in the

Parameter	Supported Values Default Value	Description
e.save	Default: true	document, can be used for future signature verification.
eSignPublicKeyFil e	Specify your public key location;  Default key: /config/ esignkey-public.key	Public key to encrypt the biometric data
SignerNameEntry. visible	true; false  Default: true	This setting defines if the text field <b>Signer Name</b> that is displayed in the signature capture dialog should be visible or not.  If the value set to "true" then the menu item is visible.
SignerNameEntry. remember	any number  Default: 5	This setting defines number of signer names that will be remembered in the <b>Signer Name</b> field. The remembered entries will be available in the drop down list.
		If the value set to 5 then 5 signer names will be remembered and available in the drop down list.
SignatureImage.c olor	Hex RGB value for the signature color,  Default: 000000 (black)	The configured color is used in the signature capture dialog, Tablet LCD (for color tablets), and the color of the signature image in the digital signature appearance.
		This configuration is not supported in TIFF documents.
SignatureImage.al ignment	left; right; center  Default: center	Signature image alignment in the digital signature appearance. Not supported in TIFF documents.
SignatureText.font	a string of the font name  Default: document  specified	This setting defines font name used in the signature text. Font specified must be included in the <i>fontconfigFiles</i> as a <i>FontFile</i> . Not supported in TIFF documents.
SignatureText.alig nment	left; right; center  Default: center	Signature text alignment in the digital signature appearance. Not supported in TIFF documents.
SignatureText.tim e.visible	true; false  Default: false	Display the sign time or not in the digital signature appearance. Not supported in TIFF documents.
SignatureText.tim e.formatting	Default UTC in ISO 8601 extended format	Format string determines the format of the date and time text of the digital signature appearance, <a href="DateTimeFormatting">DateTimeFormatting</a> . Not supported in TIFF documents.
SignatureText.sig ner.visible	true; false  Default: true	Display the signer name or not in the digital signature appearance. Not supported in TIFF documents.

Parameter	Supported Values Default Value	Description
Signature.TimeSt ampAuthority.conf ig	TimeStampClientCertific atePath, TimeStampClientKeyPat h, TimeStampServerPassw ord, TimeStampServerTruste dCertificatesPath, TimeStampServerURL, TimeStampServerUser, TimeStampHashAlgorith m	String of " " separated list of key value pairs of configuration values.  See <u>Timestamp Server Integration</u> .
VirtualButtonOK.vi sible	true; false  Default: true	This setting defines if the button that is displayed in the signature capture dialog should be visible or not.  If the value set to "true" then the button is visible.
VirtualButtonOK.al ignment	left; right; center  Default: left	This setting specifies the alignment of the button that is displayed in the signature capture dialog.  See Configuration priority.
VirtualButtonOK.w idth	Number  Default: 300	This setting defines the width of the button. Changes of this setting apply only for buttons that are displayed in the signature capture devices with LCDisplay.  See Configuration priority.
VirtualButtonOK.h eight	Number  Default: 100	This setting defines the height of the button. Changes of this setting apply only for buttons that are displayed in the signature capture devices with LCDisplay.  See Configuration priority.
VirtualButtonEras e.visible	true; false  Default: true	This setting defines if the button that is displayed in the signature capture dialog should be visible or not.  If the value set to "true" then the button is visible.
VirtualButtonEras e.alignment	left; right; center  Default: center	This setting specifies the alignment of the button that is displayed in the signature capture dialog.

Parameter	Supported Values Default Value	Description
		See Configuration priority.
VirtualButtonEras e.width	Number;  Default: 300	This setting defines the width of the button. Changes of this setting apply only for buttons that are displayed in the signature capture devices with LCDisplay.  See Configuration priority.
VirtualButtonEras e.height	Number; Default: 100	This setting defines the height of the button. Changes of this setting apply only for buttons that are displayed in the signature capture devices with LCDisplay.  See Configuration priority.
VirtualButtonCanc el.visible	true; false  Default: true	This setting defines if the button that is displayed in the signature capture dialog should be visible or not.  If the value set to "true" then the button is visible.
VirtualButtonCanc el.alignment	left; right; center  Default: right	This setting specifies the alignment of the button that is displayed in the signature capture dialog.  See Configuration priority.
VirtualButtonCanc el.width	Number  Default: 300	This setting defines the width of the button. Changes of this setting apply only for buttons that are displayed in the signature capture devices with LCDisplay.  See Configuration priority.
VirtualButtonCanc el.height	Number  Default: 100	This setting defines the height of the button. Changes of this setting apply only for buttons that are displayed in the signature capture devices with LCDisplay.  See Configuration priority.
SigningCeremony Document.zoom	Number>=0 Default: 0.75	Zoom the page until the field occupies this percentage of the width value 0 to not zoom the document.
VerifySignatureSo urce.visible	true; false  Default: false	If the value is enabled and signature verification is configured the verification source combobox is displayed.

#### **Timestamp Server Integration**

Description of the supported configuration values:

#### TimeStampClientCertificatePath

The pathname of a file containing the certificate in PEM format for authenticating to an RFC 3161 time-stamp server over HTTPS.

If the value is non-empty, TimeStampClientKeyPath must also be set.

If the value is empty, the client won't authenticate itself. The default value is empty.

See also <u>TimeStampServerURL</u>, <u>TimeStampClientKeyPath</u>, and <u>TimeStampServerTrustedCertificatesPath</u>.

#### TimeStampClientKeyPath

The pathname of a file containing the private key in PEM format for authenticating to an RFC 3161 time-stamp server over HTTPS.

If the value is non-empty, TimeStampClientCertificatePath must also be set.

If the value is empty, the client won't authenticate itself. The default value is empty.

See also <u>TimeStampServerURL</u>, <u>TimeStampClientKeyPath</u>, and <u>TimeStampServerTrustedCertificatesPath</u>.

#### TimeStampServerPassword

The password for Basic/Digest HTTP authentication to the time-stamp server. If this parameter is set, **TimeStampServerUser** must also be set.

#### • TimeStampServerTrustedCertificatesPath

The pathname of a file containing trusted root certificates in PEM format for authenticating RFC 3161 time-stamp servers over HTTPS.

If the value is empty, time-stamp servers won't be authenticated. The default value is empty. See also <a href="mailto:TimeStampServerURL">TimeStampServerURL</a>, <a href="mailto:TimeStampClientCertificatePath">TimeStampClientCertificatePath</a>, and <a href="mailto:TimeStampClientKeyPath">TimeStampClientKeyPath</a>.

#### TimeStampServerURL

The URL of an RFC 3161 time-stamp server.

The scheme of the URL must be either "http" or "https".

See also TimeStampClientCertificatePath, TimeStampClientKeyPath,

<u>TimeStampServerPassword</u>, <u>TimeStampServerTrustedCertificatesPath</u>, and <u>TimeStampServerUser</u>.

#### • TimeStampServerUser

The user name for Basic/Digest HTTP authentication to the time-stamp server. If this parameter is set, string parameter **TimeStampServerPassword** must also be set.

#### • TimeStampHashAlgorithm

Hash algorithm for RFC 3161 timestamps. The default value is tsha default.

tsha\_default: Currently SHA-1, may change in future

tsha\_sha1: SHA-1 tsha\_sha256: SHA-256

#### Example

```
Signature.TimeStampAuthority.config="TimeStampServerURL=https://www.timestampservice.com|TimeStampServerUser=myuser|TimeStampServerPassword=secret|TimeStampHashAlgorithm=tsha sha256"
```

#### Virtual button configuration priority

If a BackgroundObjectsXml is available in the installation the virtual button configuration is read from this file, VirtualButton width, height and alignment from the SignDoc2.ini is ignored.

#### [Verification]

# [Verification] – Section of the SignDoc2.ini file for configuring the attributes for signature verification process

Parameter	Supported Values Default Value	Description
VerificationPolicy. CertificateChain	ccvp_dont_verify ccvp_accept_self_signed ccvp_accept_self_signed_ with_bio ccvp_accept_self_signed_ with_rsa_bio ccvp_require_trusted_root Default: ccvp_accept_self_signed_ with_rsa_bio	ccvp_dont_verify Don't verify the certificate chain. Always pretend that the certificate chain is OK.  ccvp_accept_self_signed Accept self-signed certificates. If the signing certificate is not self-signed, it must chain up to a trusted root certificate.  ccvp_accept_self_signed_with_bio Accept self-signed certificates if biometric data is present. If the signing certificate is not self-signed or if there is no biometric data, the certificate must chain up to a trusted root certificate.  ccvp_accept_self_signed_with_rsa_bio Accept self-signed certificates if asymmetrically encrypted biometric data is present. If the signing certificate is not self-signed or if there is no biometric data or if the biometric data is not encrypted with RSA, the certificate must chain up to a trusted root certificate.  ccvp_require_trusted_root Require a trusted root certificate. The signing certificate must chain up to a trusted root certificate.
VerificationPolicy. CertificateRevoca tion	crvp_dont_check crvp_offline crvp_online Default: crvp_dont_check	crvp_dont_check Don't verify revocation of certificates. Always pretend that certificates have not been revoked. crvp_offline Check revocation, assume that certificates are not revoked if the revocation server is offline. crvp_online Check revocation, assume that certificates are revoked if the revocation server is offline.
VerificationPolicy. VerificationModel	vm_windows	vm_windows Windows certificate verification model

#### [export\_location]

#### [export\_location] - Section for configuring exporting of the file

An export location is a directory where the file will be copied to when the user clicks the toolbar

icon Save and Close. The file will be exported only to the first successful location.

**export\_location** allow users to configure the location the active document is exported when the

Save and Close toolbar icon is clicked. SignDoc Desktop supports exporting to folders or SFTP servers. Multiple export locations can be configured (see export\_location.count), SignDoc Desktop will attempt to export the document to each of these locations until it is successful. For convenience there is a export\_location.default to specify default values for each of the export locations.

Parameter	Supported Values Default Value	Description
export_location.c ount	Number  Default: none	Using this setting, please define the number of the export locations
min_num_signat ures	Number  Default: 0	With this setting it is possible to define a minimum number of signatures that are required before the document can be exported to the defined location
input_file	save; delete  Default: delete	This setting defines if the original document should be saved/deleted after it has been exported into the predefined export location. If the value is set to "delete" the file will be deleted.

#### [export\_location.default] - Section that lists the default values for the export locations

Parameter	Supported Values Default Value	Description
export_location.ty pe	folder; sftp  Default: folder	Supported type are 'folder' and 'sftp'. 'folder' also supports network shares. Note: OpenSSH SFTP server are supported.
export_location.o utput_dir	Directory  Default: none	Directory to export the file, please use forward slashes. The file can only be exported to existing directories.  export_location.type=folder  Fully qualified path to the export directory. If empty the file will be exported into the SignDoc Desktop installation directory.  export_location.type=sftp  If empty the root of the SFTP server is used. Use "." for the user home directory.
export_location.p refix	String prefix  Default: none	This setting specifies the prefix to add to file name of the exported file.
export_location.p	String postfix	This setting specifies the postfix to add to file

Parameter	Supported Values Default Value	Description
ostfix	Default: none	name of the exported file.
export_location.m essage_success	Message Default: none	This setting defines a message text that is displayed if export was successful. The message is language independent. If nothing is specified then no message is displayed. Specify a message text in ""
export_location.m essage_error	Message Default: Export failed. Please check your configuration.	This setting defines a message text that is displayed if export failed. The message is language independent. If nothing is specified then no message is displayed. Specify a message text in ""
export_location.h	Host	Used only with SFTP server
ost		Name or IP address
export_location.p	Port number	Used only with SFTP server
ort	Default: 22	Port to connect to server
export_location.fi	SSH server fingerprint	Used only with SFTP server
ngerprint	Optional	Fingerprint of the SSH server
export_location.lo	User name	Used only with SFTP server
gin		User authorization can be done with either password or key file
export_location.p	Password	Used only with SFTP server
assword		Password for the user
export_location.p	Public Key file	Used only with SFTP server
ublic_key_file		Fully qualified path to public key file, please use forward slashes
export_location.p	Private Key file	Used only with SFTP server
rivate_key_file		Fully qualified path to private key file, please use forward slashes
export_location.p	Proxy server to use	Used only with SFTP server
roxy_name		name or IP address
export_location.p	Port number of the proxy	Used only with SFTP server
roxy_port	Server  Default: 8080	Port to connect to proxy server

This setting is language independent. The dialog only appears if specifications are made.

[export\_location.1] - Configurations for the first export location

Parameter	Supported Values Default Value	Description
export_location.o utput_dir	Specify a directory  Default: C:/	Setting for the first export directory. Please use forward slashes to separate the directories.

#### [export\_location.2] - Configurations for the second export location

Parameter	Supported Values  Default Value	Description
export_location.o utput_dir	Specify a directory e.g. // server/output  Default: no default setting	Setting for the second export directory. Please use forward slashes to separate the directories.

## [ImageCapture]

# [ImageCapture] - Section of the SignDoc2.ini configuration file to configure image capture from scanners, webcams etc

Parameter	Supported Values Default Value	Description
device_filter_expr	<regular expression="">  Default: TWAIN.+Cam  iphone</regular>	This setting specifies a filter for image capture devices. Devices get their driver type in square brackets prepended (e.g. "[TWAIN] Integrated Camera") and are compared with this pattern in a case-insensitive way. Drivers that match are not displayed.
CaptureAttach.int erfaces	twain; wia; wia2; direct_show Default: twain, wia, wia2, direct_sho w	This setting allows to search for devices which support the following interfaces.
CaptureSign.inter faces	twain; wia; wia2; direct_show Default: twain, wia, wia2, direct_sho w	This setting allows to search for devices which support the following interfaces.

## 7.4 Date and Time Formatting

In the SignDoc2.ini configuration file these expressions may be used for the date formatting:

Expression	Output
d	The day as number without a leading zero (1 to 31)
dd	The day as number with a leading zero (01 to 31)
М	The month as number without a leading zero (1-12)
MM	The month as number with a leading zero (01-12)
уу	The year as two digit number (00-99)
уууу	The year as four digit number

These expressions may be used for the time:

Expression	Output
h	The hour without a leading zero (0 to 23 or 1 to 12 if AM/PM display)
hh	The hour with a leading zero (00 to 23 or 01 to 12 if AM/PM display)
m	The minute without a leading zero (0 to 59)
mm	The minute with a leading zero (00 to 59)
s	The second without a leading zero (0 to 59)
SS	The second with a leading zero (00 to 59)
Z	The milliseconds without leading zeroes (0 to 999)
ZZZ	The milliseconds with leading zeroes (000 to 999)
AP	Use AM/PM display. "AP" will be replaced by either "AM" or "PM".
ар	Use am/pm display. "ap" will be replaced by either "am" or "pm".

Example format strings (assumed that Date time is 21 May 2012 14:13:09):

Format	Result
dd.MM.yyyy	21.05.2012
hh:mm:ss.zzz	14:13:09.042
h:m:s ap	2:13:9 pm

#### 7.5 Font Configuration

For creating the appearance of DigSig signatures and for filling in text fields (both in PDF documents), extended fonts are required if characters outside the character set supported by the standard fonts (or fonts already embedded in the document) are used.

Additional fonts may also be required rendering PDF documents.

A font configuration file is an XML document specifying the pathnames of TrueType font files and font substitution rules. The "FontFiles" element contains the pathname of a TrueType font file. The last component of the pathname may contain? and \* wildcards to refer to multiple files. Relative pathnames are relative to the directory containing the font configuration file. The "Substitution" element defines a font substitution rule, specifies the font name to be replaced and the name to be used as replacement (both in "FontName" elements).

When a font is needed, the substitution rules whose "type" attribute is "forced" are tried in the sequence specified in the font configuration file until a match is found. If a match is found, the font name will be replaced by the substitute font name and the "embed" attribute of the substitution rule will take effect. If no match is found, the original font name will be used.

Then, SignDoc Desktop tries to locate the font by trying these methods sequentially until a suitable font (ie, one having a matching name and supporting all required characters) is found:

- match against the fonts declared in the document's interactive form dictionary (AcroForm)
- match against the names of the 14 standard fonts
- match against the fonts used by the document's pages
- match against the font files loaded by the "FontFiles" elements in the order they occur in the font configuration file

If a suitable font is found, it will be used. Otherwise, the substitution rules whose "type" attribute is "fallback" (or missing) are tried in the sequence specified in the font configuration file until a match is found. The substitution rules are applied to the original font name (ie, without taking the substitutions of type "forced" into account). If no match is found or the substitution doesn't change the font name, SignDoc Desktop will report an error. Otherwise, the font name will be replaced by the substitute font name and the "embed" attribute of the substitution rule will take effect. SignDoc Desktop then tries again to locate the font by using the methods listed above.

Font substitution rules are always applied to the original, requested font name, that is, the output of a rule is not used as input for another rule.

For embedded fonts and font files, the font name will be matched against the PostScript names and font family names. The italic and bold attributes of the font are also compared (in case the match is on the font family name).

Here is the Document Type Definition for font configuration files:

```
<!-- Contents: either the pathname of a single font or a pathname
     containing wildcard characters * and ? in the last component
     such as c:\fonts\*.ttf. Relative pathnames are relative to the
     directory containing the font configuration file.
     The "embed" attribute controls whether the fonts will be
     embedded into the document or not. If a font is already
     embedded and contains all required glyphs, it won't be
     embedded again. These values are available:
                The fonts won't be embedded
               The fonts will be embedded completely
       subset
               Only the required glyphs will be embedded
     The "Substitution" element can override this attribute.
     Note that documents compliant with PDF/A must embed all fonts.
     Due to implementation restrictions, embedding a Type1 font currently
     removes PDF/A compliance. -->
<!ELEMENT FontFiles (#PCDATA)>
<!ATTLIST FontFiles
   embed (no|yes|subset) "no"
<!-- Defines one font substitution. Font substitutions are tried one by
     one until a match is found or the end is reached. Substitute the
     first font with the second one. Letter case and space characters
     are ignored. There is only one level of font substitutions, that
     is, substituted names are not subject to substitution.
     There are two types of font substitutions: If the "type"
     attribute is "forced", the substitution will be applied before
     trying to locate the font. That way, font can be substituted by
     another one even if it covers all required characters.
     If the "type" attribute is "fallback", the substitution will be
     applied only if no suitable font has been found. The substitution
     will be applied to the original font name, ie, without taking
     a substitution of type "forced" into account.
     In other words, these steps are performed when looking for a
     font:
     - apply font substitutions of type "forced"
     - search for the font
     - If a suitable font has been found, use it
     - apply font substitutions of type "fallback" to the original font name
      search for the font
     - If a suitable font has been found, use it
     The "embed" attribute controls whether the font will be
     embedded into the document or not. If a font is already
     embedded and contains all required glyphs, it won't be
     embedded again. These values are available:
      default Use the "embed" attribute of the FontFile element for the
                substituted font
                The font won't be embedded
               The font will be embedded completely
     subset Only the required glyphs will be embedded
The "no", "yes", and "subset" values override the "embed" attribute
     of the FontFile element for the substituted font.
     Note that documents compliant with PDF/A must embed all fonts.
     Due to implementation restrictions, embedding a Type1 font currently
     removes PDF/A compliance. -->
<!ELEMENT Substitution (FontName, FontName) >
<!ATTLIST Substitution
    type (forced|fallback) "fallback"
    embed (default|no|yes|subset) "default"
<!-- Contents: the font family name or PostScript name of the font to be
     substituted or of the font used as substitute. \longrightarrow
<!ELEMENT FontName (#PCDATA)>
```

#### Example

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE SPFontConfig SYSTEM "SPFontConfig.dtd">
<SPFontConfig>
 <FontFiles embed="yes">c:\fonts\LinLibertine_*.ttf</fontFiles>
 <FontFiles embed="yes">c:\fonts\DejaVu*.ttf
 <Substitution type="forced">
   <FontName>Times Roman</FontName>
   <FontName>Linux Libertine
  </Substitution>
 <Substitution>
   <FontName>Helv</FontName>
   <FontName>DejaVu Sans
 </Substitution>
  <Substitution>
   <FontName>Helvetica
   <FontName>DejaVu Sans
 </Substitution
 <Substitution>
   <FontName>Arial</FontName>
   <FontName>DejaVu Sans
 </Substitution>
</SPFontConfig>
```

The fonts referenced by these font configuration files can be obtained from <a href="http://dejavu-fonts.org">http://dejavu-fonts.org</a> and <a href="http://linuxlibertine.sourceforge.net">http://dejavu-fonts.org</a> and <a href="http://linuxlibertine.sourceforge.net">http://linuxlibertine.sourceforge.net</a>.

## 8 SignDoc Desktop ActiveX Component

Installing Signdoc Desktop ActiveX Component
Sample for SignDoc Desktop ActiveX Component

## 8.1 Installing Signdoc Desktop ActiveX Component

## A IMPORTANT NOTE

If you used the setup provided by Kofax to install SignDoc Desktop, then it is not necessary to register the ActiveX Component manually.

If you would like to use the SignDoc Desktop ActiveX Component it is necessary to perform some additional installation steps as described below:

• Start the command line window by entering the command **run** in the **Start** menu, then type **cmd** and go to the SignDoc Desktop installation folder. Default location:

```
C:\Program Files\Kofax\SignDocDesktop
```

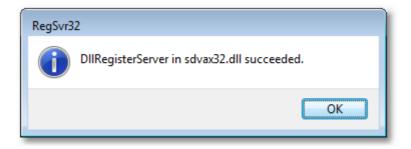
Register the ActiveX Component sdvax32.dll:

To register, please enter following command into the command line window:

```
regsvr32 sdvax32.dll
```

and press the Enter key.

• A message notifying about the registration result as shown below will appear:



• Click the **OK** button.

Sample for SignDoc Desktop ActiveX can be found in:

C:\Program Files\Kofax\SignDocDesktop\ActiveXSample\Sample.zip

See the chapter Sample for SignDoc Desktop ActiveX.

## 8.2 Sample for SignDoc Desktop ActiveX Component

Delivered with SignDoc Desktop a C# sample shows how to integrate the SignDoc Desktop ActiveX Control. The sample can be found in **Sample.zip** file that is located in the SignDoc Desktop installation folder. The default setting for the installation folder is:

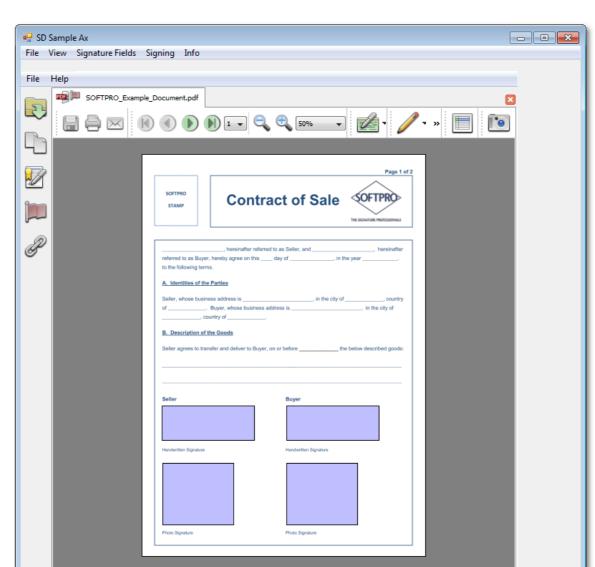
C:\Program Files\Kofax\SignDocDesktop\ActiveXSample

To start using the sample, please perform following steps:

- 1. Unpack Sample.zip file.
- 2. Make sure that SignDoc Desktop ActiveX Component **sdvax32.dll** is registered. See the chapter <u>Installing SignDoc Desktop ActiveX Component</u>.
- 3. Please set the environmental variable PATH to include the folder where following 3 files are located. These files can be found in:

Sample.zip\ActiveX\CS.Sample.Ax\bin\Release

- AxInterop.sdvax32Lib.dll
- Interop.sdvax32Lib.dll
- CsSampleAx.exe
- 4. To start the sample run CsSampleAx.exe



Below picture shows the C# sample with loaded PDF document:

The sample shows how to implement the following ActiveX interfaces:

- load a document to the ActiveX Control
- save a document loaded in the ActiveX Control
- save a document loaded in the ActiveX Control to a new name
- · close the document loaded in the ActiveX Control

The documentation for the SignDoc Desktop ActiveX can be found in the SignDoc Desktop installation folder and can be started with **index.html**. The default setting is:

C:\Program Files\Kofax\SignDocDesktop\docu\activeX

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## 9 Deprecated Features

Image Capture Profiles
SignDoc FDF

## 9.1 Image Capture Profiles

- Setting up and Using Scanning Profiles
  - Adding a new Scan Profile
  - Modifying a Scan Profile
  - Removing a Scan Profile
- Image capture profiles

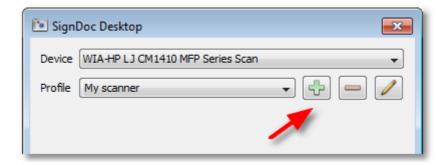
## **Setting up and Using Scanning Profiles**

Scanning profiles allow you to configure re-usable settings for scanning images to be used as document attachments. This is useful when you would like to use specific settings that are not default to the application. e.g. specific image resolution to be used with specific scanners.

#### Adding a new Scan Profile

To add a new re-usable scanning profile:

- Open a document.
- Start the attachment scanner dialog by clicking the Capture image toolbar icon at the top toolbar.
- Click the button to open a new window where you can enter the profile name.



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• Enter a name for the new profile within the dialog box that pops up and click the **OK** button.

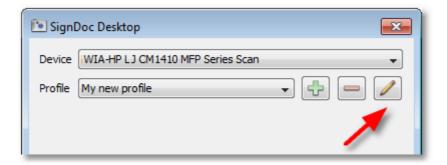


• The new scanning profile will now be available from the Profile drop-down box in the scanning dialog. The new profile will have the default scan settings which you can modify at a later time.

#### **Modifying a Scan Profile**

To edit or modify a scanning profile after it has been created:

- Start the attachment scanner dialog by clicking the Capture image toolbar icon.
- Select the profile you would like to edit and click the button to edit a profile



- A dialog box will open that allows you to modify parameter such as resolution, x and y scan coordinates, Image type (B&W or color), etc. Make any modifications you desire, and click OK.
- Your new scanning profile is ready to use and can be selected with your next scanning operation.

#### Removing a Scan Profile

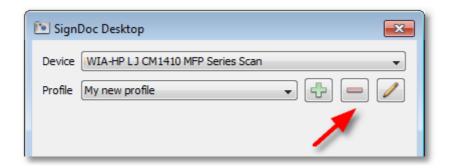
To remove a scanning profile that you no longer need:

• Start the attachment scanner dialog by licking the Capture image toolbar icon.

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• Select the profile you would like to edit and click the button to remove a profile





• You will be prompted to confirm the removal of the profile with **OK**.

#### **Image Capture Profiles**

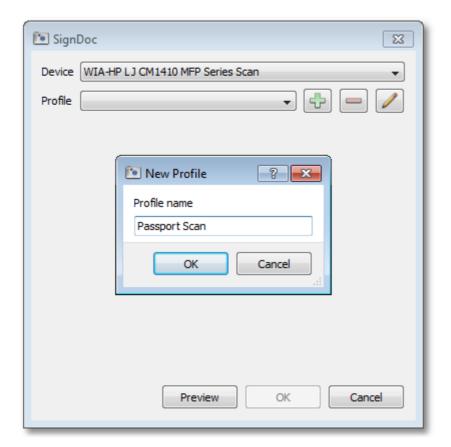
Image Capture Profiles provide a convenient way to predefine profiles for scanning images or capturing images with a webcam.

It makes it possible to use different fixed image capture settings for different scenarios, for example:

- a passport could only be scanned in gray scale with 150dpi and a size of 150mm x 100mm
- a document scan could only use black&white but with 200dpi resolution

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Add a new profile by assigning it a new name:

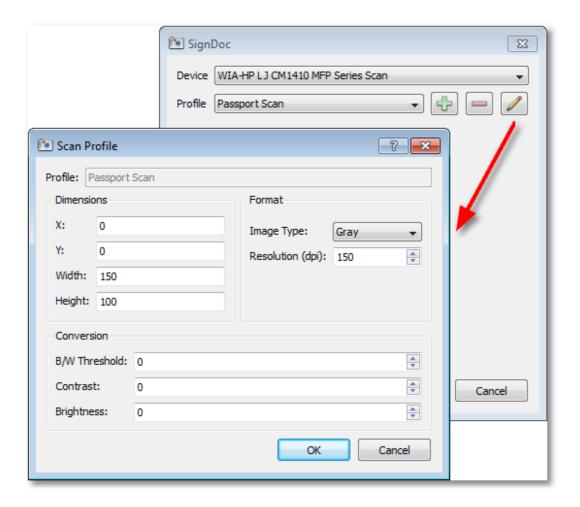


Edit the properties of the profile.

In this example, the profile **Passport Scan** has predefined parameters:

- uses grayscale
- scan resolution is 150dpi
- the scan rectangle is from 0mm,0mm to 150mm,100mm

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## 9.2 SignDoc FDF

#### **Merging FDF Documents with PDF Documents**

You can merge FDF (Forms Data Format) documents with PDF documents by using the command line utility **SignDocFDF.exe**.

After the documents were merged, the resulting PDF will be opened automatically in SignDoc Desktop.

#### Usage

SignDocFDF FDF FILE [PDF FILE] OUTPUT PDF FILE

Parameter	Description
FDF_FILE	FDF (Forms Data Format) file
PDF_FILE	PDF input file (template). If the input file is specified by in FDF file, this parameter is optional.

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Parameter	Description
OUTPUT_PDF_FILE	Filename of merged output document.

#### Example

```
SignDocFDF.exe c:\temp\fdf\CarLeaseb.fdf c:\temp\fdf
\CarLeaseb only input.pdf c:\temp\fdf\CarLeaseb out.pdf
```

#### 10 Limitations and Known Issues

<u>Limitations</u>

<u>Known Issues</u>

#### 10.1 Limitations

In this section you will find a list of some limitations in the function of SignDoc Desktop:

- Deleting digital signature fields in TIFF documents is not supported.
- Unable to edit some interactive fields such as radio buttons.
- During signature capture, the rotation of the display must not be changed on some Tablet PCs.
- Background images may not be deleted on some StepOver LCD tablets after signature capture.
- Only webcams and scanners that support the TWAIN, WIA or DirectShow interface can be
  used with SignDoc. If the image capture dialog is unable to take a snapshot or in general is
  not functioning properly, please uninstall all drivers for other image capture devcies and
  ensure only the correct manufacter driver is installed.

#### 10.2 Known Issues

This section provides information on known issues:

- DCT-encoded (lossy JPEG) images are ignored in document integrity checks.
- Adobe digital signatures in "complex" documents are not supported in document integrity checks.
- Image capture using the Microsoft Surface Pro rear webcam is not supported.
- SOFTPRO Printer Driver. If special characters are included in the file name of a Word document, these characters are lost after printing with the "SOFTPRO PDF TIFF Converter" or will not be properly implemented.
- SOFTPRO Printer Driver instabilities on Windows 8. The SOFTPRO Printer Driver is not fully supported in Windows 8. There are known issues during installation and usage.
- TIFF document does not support pen color settings.

## 11 SignDoc Desktop License

**Demo License** 

**Request Time Unlimited License** 

Obtaining the Installation Code

Installing SignDoc Desktop License

Where to purchase SignDoc Desktop license?

#### 11.1 Demo License

SignDoc Desktop is delivered with a time limited demo license. The demo license allows using all features of SignDoc Desktop within demo license validity time.



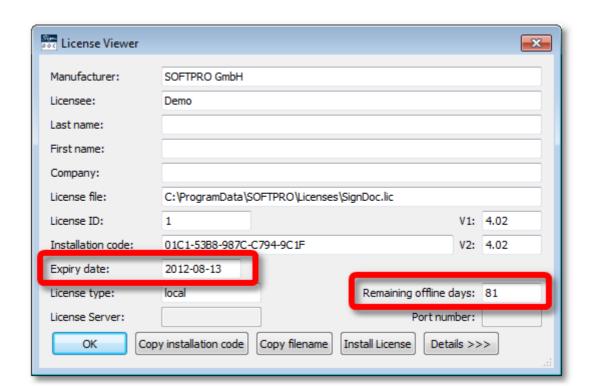
The demo license is valid for 90 days. After your demo license expires it is necessary to purchase the valid license in order to continue to use SignDoc Desktop.

To check the license validity please start the SignDoc Desktop application and select:

#### **Help > License Information**

The **License Viewer** dialog will be opened and the following fields will indicate the license expiry date:

• The field **Expiry date** shows the date when the demo license will expire.



• The field **Remaining offline days** shows in how many days the license will expire.

## 11.2 Request Time Unlimited License

To request the full license please send the license request e-mail to <a href="mailto:splm@softpro.de">splm@softpro.de</a> with following information:

- Purchase order number
- · Complete contact data
- Name of the product for which you would like to request the license (for example SignDoc Desktop)
- **Installation code** of the machine, where the product is installed (please see below how to obtain the installation code)

Once SOFTPRO license management team receives the inquiry, it will be processed and you will be sent a corresponding license file **SignDoc.lic** by e-mail. Please see below the procedure describing installation steps for the SignDoc Desktop license.

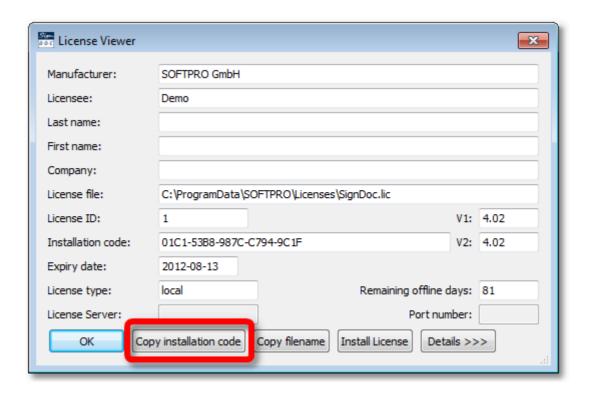
## 11.3 Obtaining the Installation Code

To obtain the installation code, please perform following steps:

1. Start License Viewer dialog, by selecting:

Start > Programs > Kofax > SignDoc Desktop > License Viewer

- 2. Click the button Copy installation code.
- 3. The installation code will be copied into the clipboard.
- 4. The copied installation code can now be pasted directly into the e-mail body.



## 11.4 Installing SignDoc Desktop License

Please perform the following steps to install the new license file for SignDoc Desktop:

- 1. Kofax will send the new license file SignDoc.lic to you by e-mail.
- 2. Please save this license file onto the computer in a preferred directory.
- 3. Start SignDoc Desktop application and select:

#### **Help > License Information**

- 4. Click the button Install License.
- 5. A file selection dialog will be opened, please browse to the folder, where the received license file has been saved.
- 6. Select the license file **SignDoc.lic** and click the button **Open**.
- 7. Click the **OK** button.
- 8. Restart SignDoc Desktop application.

## 11.5 Where to purchase SignDoc Desktop license?

For license requests, please contact Kofax sales team.

## 12 Appendix

**Contact Information** 

**Trademarks** 

**Copyright Notice** 

#### 12.1 Contact Information

Our support team will be happy to assist you.

#### **Kofax Customer Portal**

If you need support with regards to purchased Signature products please contact us via <a href="https://techsupport.kofax.com">https://techsupport.kofax.com</a>

We recommend to use Internet Explorer in case you experience problems with other browser software.

#### **Address**

You can also send your inquiry to the following address:

Kofax Deutschland AG Wilhelmstrasse 34 71034 Boeblingen Germany

#### 12.2 Trademarks

- SIGNPLUS, SignDoc, SignWare, SignInfo, SignCheck, SIVAL, SignPad, SignSecure are registered trademarks of Kofax Inc. or its affiliates – all rights reserved.
- Bonjour and the Bonjour logo are trademarks of Apple Inc.
- All other brand and product names can be trademarks, service marks or other intellectual property of the respective owners who reserve all related rights.

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## 12.3 Copyright Notice

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