



Kofax SignDoc Web 5.2.1

User's Guide

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1 Introduction

This user guide provides information and instructions to end users of SignDoc Web. The user guide describes step by step how a document can be signed by a user and explains all functionality visible to the end-user.

The user guide consists of following sections:

- Introduction section provides a general overview of the application and the purpose for which it is intended.
- Using SignDoc Web section describes how to use the application by an end user.
- Ways to Sign section informs about supported signing ceremonies.
- SignDoc Web and Sign2Phone section explains in detail how a smartphone can be turned into a signature capture device.

1.1 Preface

SignDoc Web is a strategic enterprise e-signature platform. In general, SignDoc Web is a simple and straight forward to integrate PDF signing solution which can be used to easily replace existing paper based processes. The product SignDoc Web offers web based signing using handwritten signature, Click-to-Sign, or image/photo capture.

A prepared and prefilled PDF document is loaded into the browser and can be enriched with additional data. The handwritten signature which is added to the document will be captured on one of the available signature capture devices (e.g. SignPad, TabletPC, Mobile Device). Signature capture devices can be either connected to the PC directly or in the case of a Smartphone for example accessing SignDoc Web directly. SignDoc Web supports also using the browser build-in HTML5 capture feature.

- During the signing ceremony, the biometric characteristics of the signer's signature are collected. With each captured signature time and date when the signature was captured will be stored together with it.
- As an alternative or in addition to the handwritten signature it is also possible to capture photos through a web or integrated camera and add them to the document.
- A third option is a Click-to-Sign signature which is simply the entering of the signers name in a text field showing a legal consent.

Upon saving or downloading the document the integrity value (hash) of the document will be calculated and stored in the signature field together with the biometric characteristics of the captured signature. The biometric data of the signature (e.g. coordinates, pressure, acceleration) is encrypted via the customer's public key. The biometric signature information can easily be decrypted with the customer's private key and displayed in a user friendly way via SignAlyze. All the changes and operations on a document are captured via an Audit Trail feature which is saved together with the document as metadata.

SignDoc Web also offers additional capabilities such as sending documents to an archive system and the possibility to be extended via a flexible plugin interface. The SignDoc Web application helps to minimize the footprint on the client side, since most of the software components are installed centrally on the server. The clients only need to have the signature capture device attached and the [Kofax SignDoc Device Support](#) installed. In addition the clients need a [browser extension](#) installed which provides the access to the capture device from SignDoc Web.

1.2 SignDoc Web Features

Browser Independent	Simple web based user interface. Support for most common browsers on PCs (e.g. Internet Explorer, Mozilla Firefox, Google Chrome).
Content Protection	Protect the integrity of documents by sealing them with a digital signature. Supports any x509v3 certificate provided through the key store (e.g. Windows certificate store) or through plugin interface to digitally sign documents by using an external method (e.g. for usage of a Hardware Security Module - HSM).
Customer specific data	Set customer metadata for workflow process.
Customer specific document processing	Using the plugin interface to write your own plugins for document processing.
Customer specific labels	Customize labels of signature fields depending of the document workflow.
Customization	Enterprises can utilize SignDoc Web and launch their own e-signing solution, as well as integrate the functionality of SignDoc Web into their own apps (SDK available). Using your enterprise .css style is also supported. Additionally, for user attendance to most important document content signature device (e.g. SignPad devices) background can dynamically be updated with document specific information.
Device Independent	Supports many different signature pads, interactive pen displays, tablet/slate PCs, iPad, Android and Windows tablets and iOS, Android and Windows smartphones.
Document Binding	When a signature is captured it is safely embedded using an asynchronous public key encryption into and uniquely bound to the target document. Copy/paste attacks can thus be easily detected. SignDoc Web combines handwritten signatures with Public Key Infrastructure.
Enter Signature Fields	Enter signature fields anywhere on a document. It is useful for signing non-fillable documents.
Fill out and sign PDF forms	Complete and sign PDF forms if it is opened or pre-populate the fields first automatically.
Flatten PDF	It locks content in form fields so it can be assured that information may no longer be changed. Flatten a PDF removes any layers (annotations, digital signatures ...) and consolidate them into one layer, which is supported by all PDF viewers.
Guidance in the signing process	Define and position data or signature fields and specify their completion/signing order. Additionally, highlight mandatory signature fields, define the order in which forms have to be signed, enforce the signing method, and much more. It's possible to disable

	<p>certain functionality for a particular document, such as deleting a predefined signature field.</p>
Handwritten Signature Capturing	<p>A handwritten signature captured with SignDoc Web is much more than just an electronic image of a digitized signature embedded in a PDF or TIFF document.</p> <p>SignDoc Web records - forensically identifiably - the handwritten signature of a person using all available parameters, such as writing movement, time, velocity, and acceleration.</p>
Identity/Signature verification	<p>SignDoc Web captures the signature of a person using all available parameters of writing movement. If there is a doubt about the signature, an expert tool is available to forensically analyze the biometric characteristics of the captured signature. This capability can be taken one step further, with real-time verification of an acquired signature against a signature reference stored in a database to ensure that only authorized people can actually sign a document. Signature validation can be triggered for specific signature fields.</p>
Integration	<p>Integration with ERP, CRM, DMS, Workflow management, etc via web services (SOAP, REST) , Citrix and Terminal Server support.</p> <p>For example: No need to transfer a PDF document; users can receive a link to access the PDF on the server and only image previews are transferred to the app. Thus, the signed original document is securely server-based and not automatically copied (ie duplicated) to the mobile device. All manipulations of the PDF are always performed in the safe data center environment.</p>
Offline	<p>Take documents offline.</p>
On-premises or Cloud-based	<p>SignDoc Web is available as an on-premises installation or can be installed as a cloud-based solution.</p>
PKI based Certificates	<p>Verify an electronic document before it will be signed to know if it is valid.</p>
Print	<p>Print document before or after saving or signing.</p>
Signature Capturing	<p>Sign electronic documents (PDF, TIFF) using handwritten signatures, photos or click-to-sign signatures.</p>
Use PDF Templates	<p>Pre-populate, complete and sign PDF forms created from a template.</p>
Watermark	<p>Add watermarks like 'Confidential' or 'Draft' to your documents.</p>

2 Using SignDoc Web

[Working with a Document](#)

[SignDoc Web Toolbar](#)

[Gestures on Mobile Devices](#)

[Sample Portal Page](#)

2.1 Working with a Document

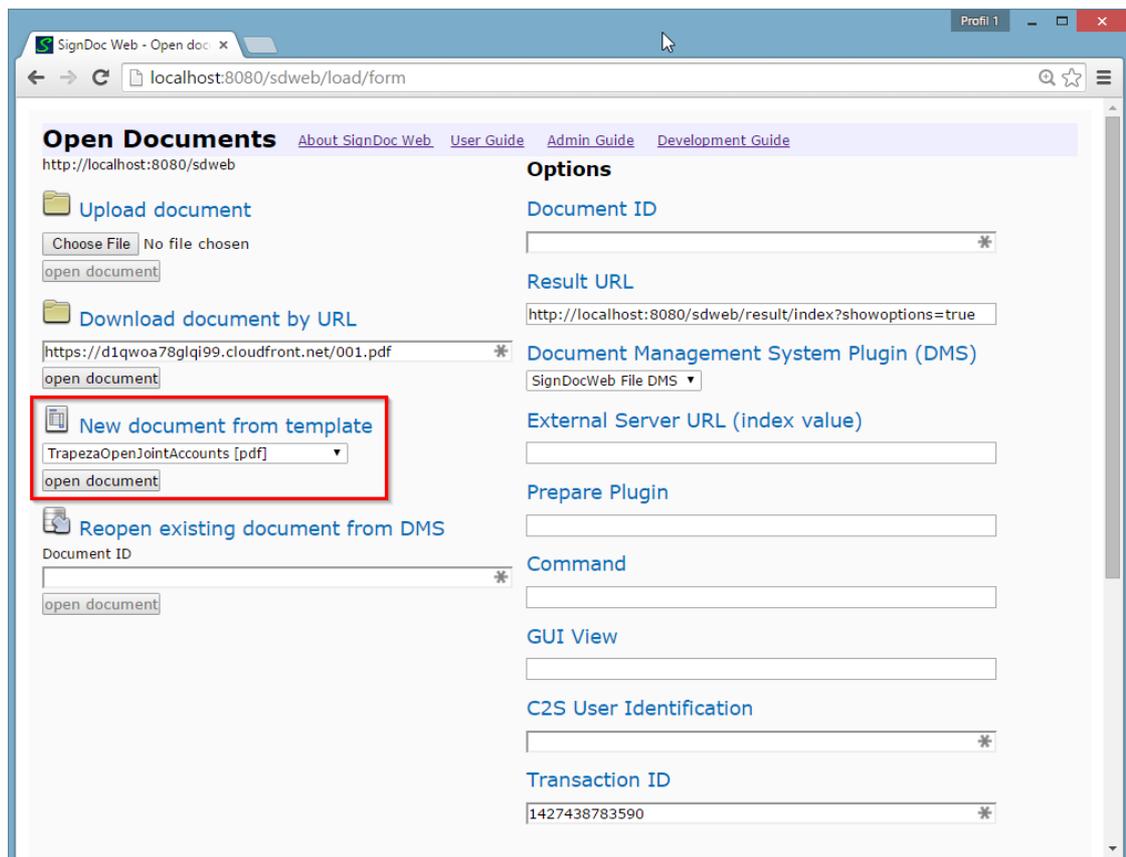
Signing a PDF Document

NOTE

Please make sure that supported signature capture device is properly connected and corresponding driver is installed.

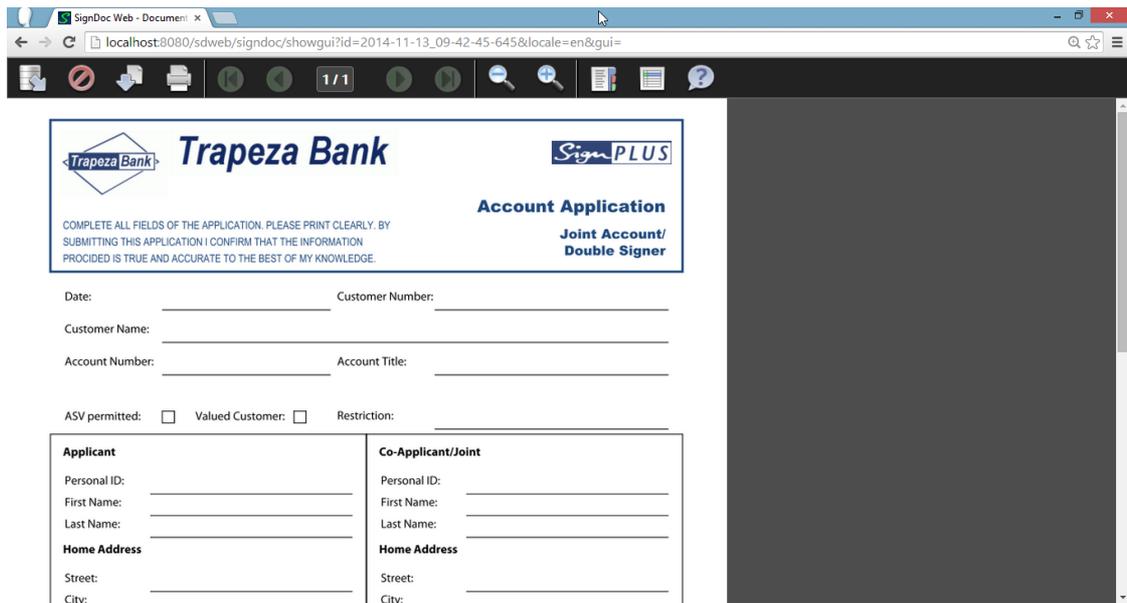
To sign a PDF document, please perform the following steps:

1. Create a new document from demo page, for example, by creating a **New document from template**. Select one of the available templates from the drop down list and click **open document** button.



Please see the chapter [Open Documents](#) for more information.

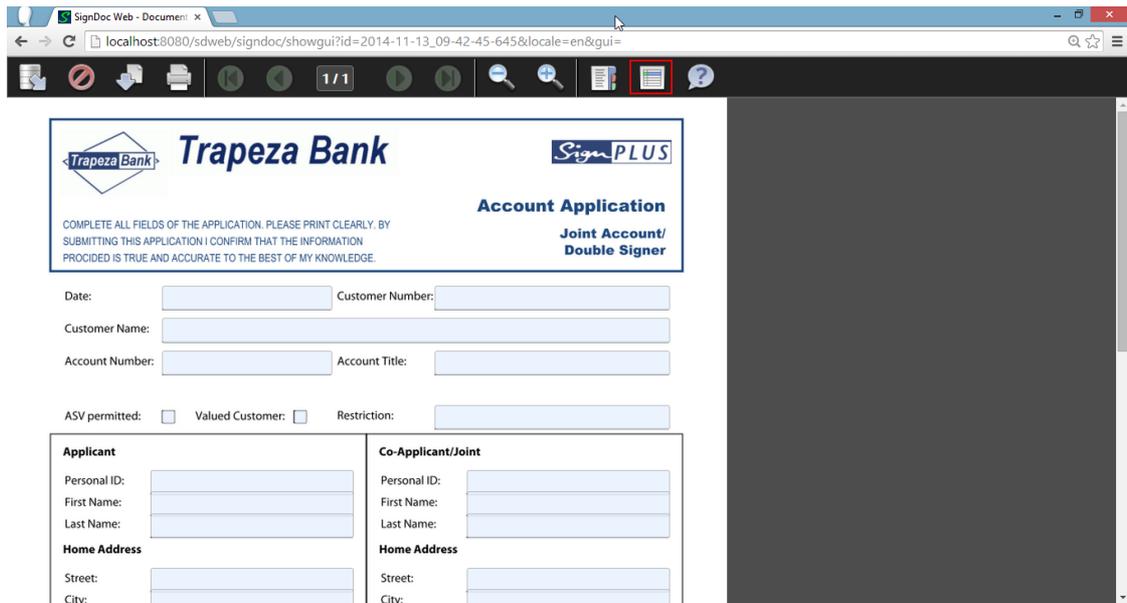
2. The new document will be created based on the selected template and will be displayed in the browser window.



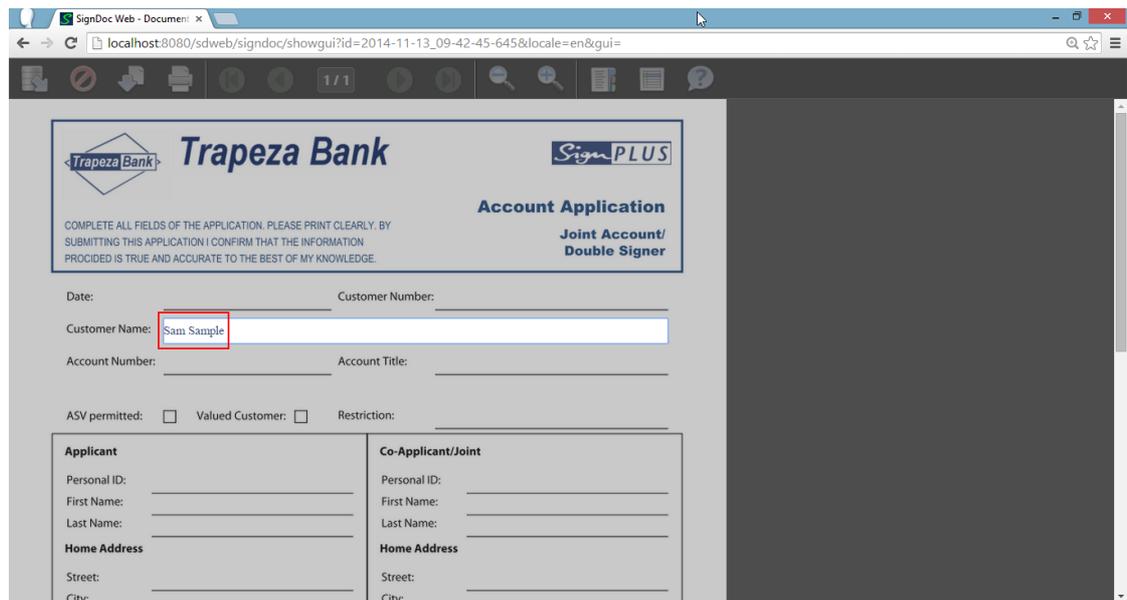
3. On the top of the page the SignDoc Web toolbar will be shown. Please find a description of the items in the chapter [SignDoc Web toolbar](#).



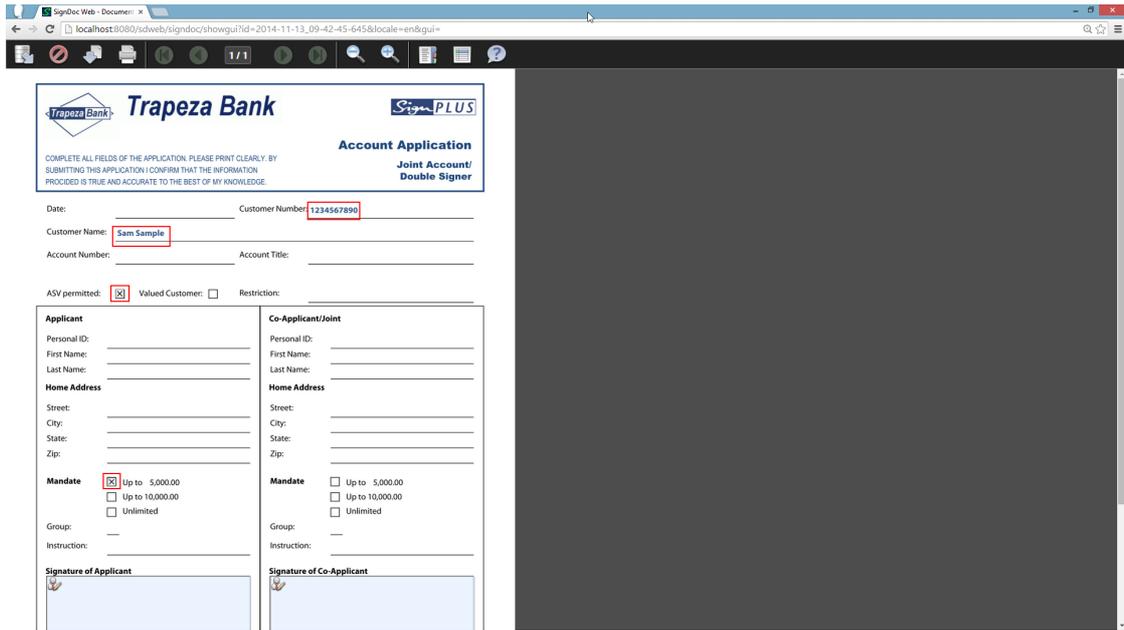
4. SignDoc Web offers a possibility to edit the PDF documents directly in the browser window. For using this functionality the PDF document should contain the editable form fields, that are supported by SignDoc Web (**text fields, check boxes, radio buttons**). If the document already contains the supported editable form field, please click the toolbar icon  **Highlight input fields**. Once the icon is clicked, all the editable form fields will become highlighted as shown on the picture below:



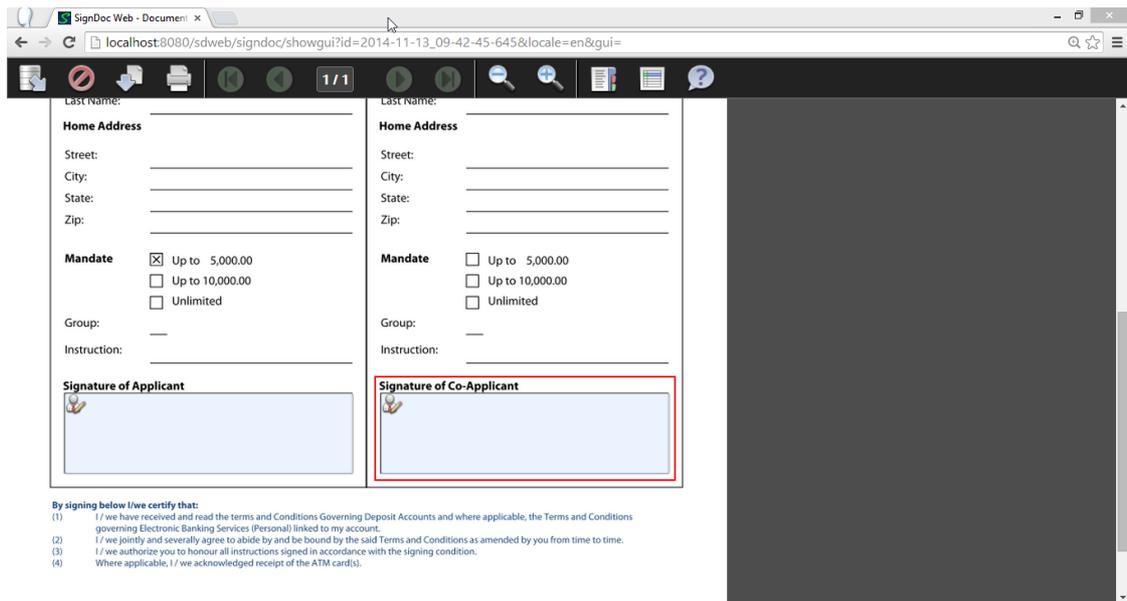
- 5. Using a mouse, please click on the field which you would like to edit. Once clicked, the field will become activated and it will be possible to enter the text. Please enter the text and press **Enter** key on the keyboard to confirm the entry. The text will be inserted in the corresponding text field.



- 6. To activate the necessary check box, simply click on the check box. The picture below shows an example of the document with entered text and activated check boxes:



7. To sign the document, please click on the signature field directly in the document:



NOTE

Find a description of signing a document using a mobile device with the Sign2Phone App in [How to use Sign2Phone](#).

8. The signature capture dialog will be opened as shown below.

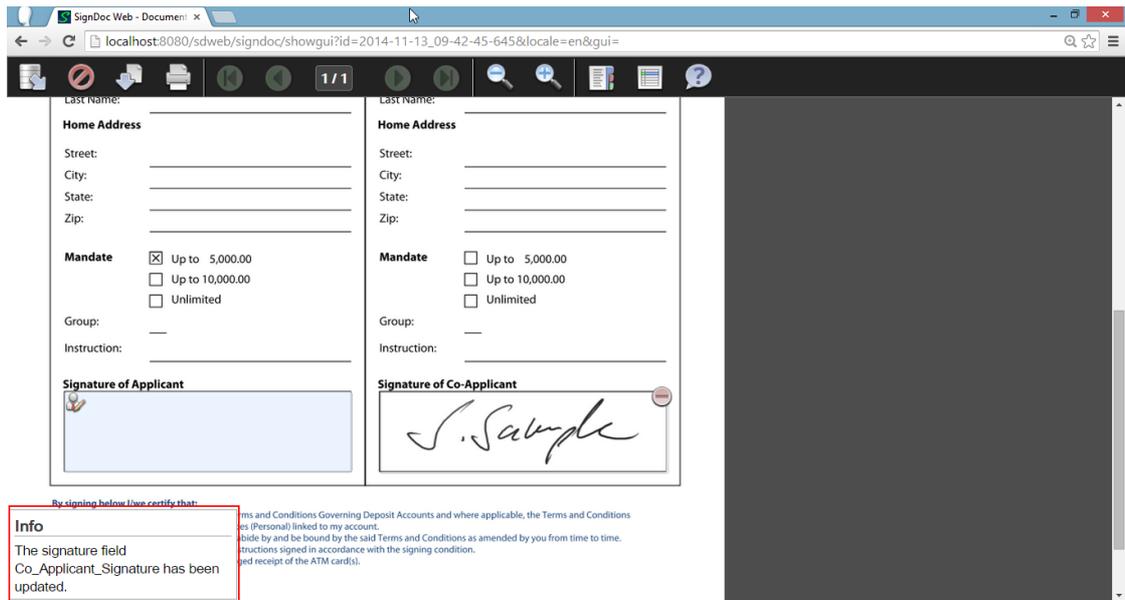


If the signature capture dialog was not opened, please make sure that SignDoc Plugin has been installed on this computer.

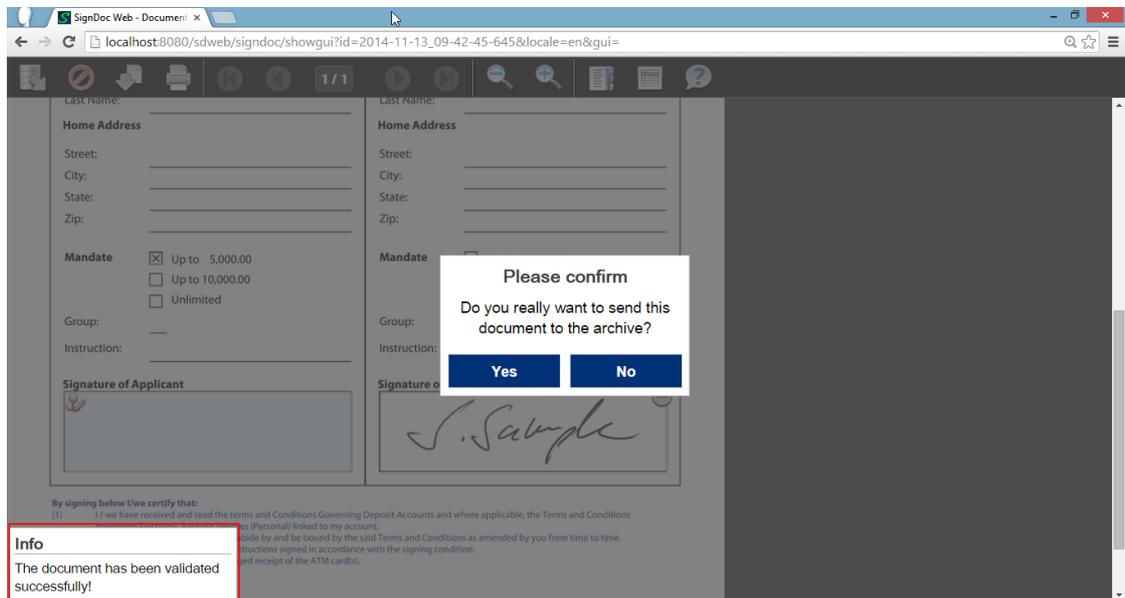
- Please sign on the signature capture device. Click the button **Erase** if you would like to re-enter the signature. Click the button **OK** to confirm the signature entry or click **Cancel** to abort the signature capture process.



- After clicking the **OK** button the signature capture dialog will be closed and the captured signature will be inserted into the document in the corresponding signature field.



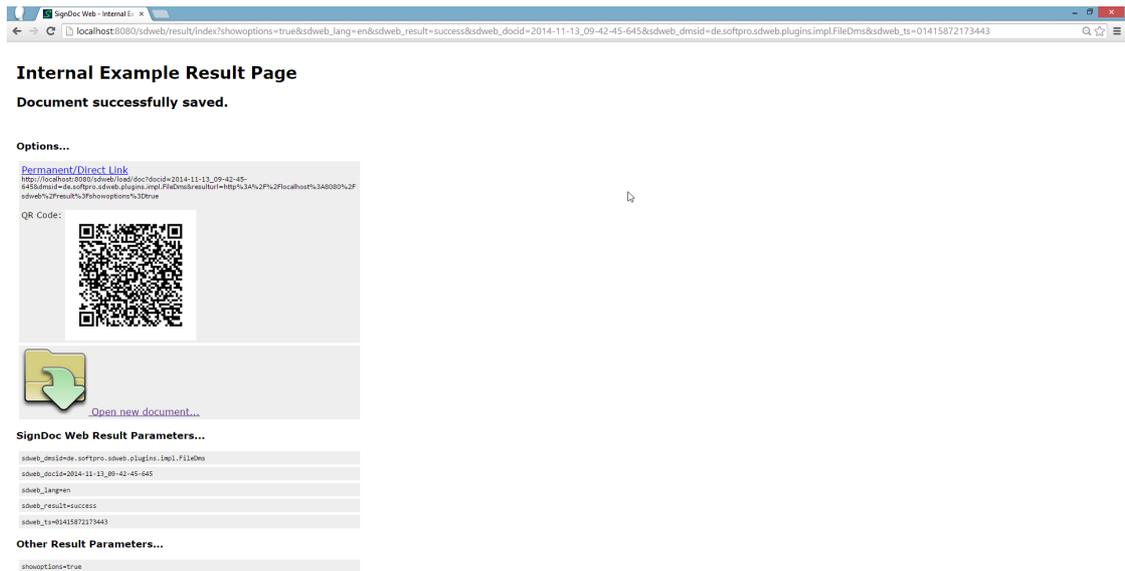
11. When all the necessary signatures are inserted in the document, please click the  **Send document to archive** icon to archive the document.
12. The message asking if you really want to send the document to archive will appear in the middle of the browser window. At the same time the info message notifying about the document validation status will appear in the bottom of the left corner of the browser window.



13. Click the **Yes** button to confirm and document will be sent to the archive. If the SignDoc Web has been installed with a default setting the location of the DMS folder will be in

C:\ProgramData\SOFTPRO\SignDocWeb\dms

14. On the last SignDoc Web demo page the information that the document successfully saved will be displayed.



15. The last SignDoc Web demo page will be displaying the additional information about the currently archived document like options and result parameters.

2.2 SignDoc Web Toolbar

This chapter provides a description of all available SignDoc Web toolbar icons.

By default, the below set of SignDoc Web toolbar icons is displayed. If you prefer not to display some of the icons or to display additional ones within your environment it can be configured. For further information please contact your SignDoc Web administrator.

Icon	Name	Description
	Send document to archive	When clicking this toolbar icon the document will be sent to archive.
	Cancel document	This icon can be used when it is necessary to abort the document processing.
	Download document	This icon offers a possibility to download the document from the server and to save it locally.
	Print document	The document currently loaded in SignDoc Web can be printed out by clicking this toolbar icon.
	Go to the first page of the document	When clicking this toolbar icon the first page of the document will be displayed.
	Go to the previous page of the document	When clicking this toolbar icon the previous page of the document will be displayed.

Icon	Name	Description
	Select a page within the document	This toolbar icon offers a possibility to go to the preferred page within the document simply by entering the necessary page number.
	Go to the next page of the document	When clicking this toolbar icon the next page of the document will be displayed.
	Go to the last page of the document	When clicking this toolbar icon the last page of the document will be displayed.
	Zoom out the document	This toolbar icon can be used to zoom out the currently document.
	Zoom in the document	This toolbar icon can be used to zoom in the currently document.
	Display Fields	This toolbar icon shows the available capture fields and their status.
	Highlight input fields	When clicking this toolbar icon all the input fields, like text fields, check boxes and signature fields will be highlighted.
	Display help	This toolbar icon provides help information on SignDoc Web.

2.3 Gestures on Mobile Devices

Support of Gestures on Mobile Devices

The basic gestures **Swipe** (change page) and **PinchSpread** (zoom) are implemented.

PinchSpread can be done with two fingers and is available on iPad, Android and Windows devices.

1-finger Swipe can be done with one finger on iPad and Android > 4.0 devices.

3-finger Swipe can be done on Windows and Android < 4.1 devices (1-finger swipe is technically not possible on these devices). For compatibility reasons a 3-finger Swipe can also be done on iPad and Android > 4.0 devices.

To differ a swipe gesture from a scrolling gesture the swipe gesture has these characteristics:

- If image width is larger than the screen width, the current scroll position has to be either 0 or the maximum possible position (this characteristic is only available for 1-finger swipe)
- The duration of the gesture is below a configured threshold
- The pixel distance between the gesture start and the gesture end position is above a configured threshold factor

Per default PinchSpread gestures and Swipe gestures are disabled via configuration.

PinchSpread Configuration in `mobile_configuration.xml`

PinchSpread is enabled by adding it to the zoom list and setting it as default:

```
<component id="Lists">
.....
<element id="ZoomList">
<parameter key="Keys" value="PINCH_SPREAD"/>
<parameter key="Default" value="PINCH_SPREAD"/>
</element>
.....

<component id="Miscellaneous">
.....
<element id="Zoomfactor">
<!--
The maximal allowed zoomfactor as provided in sdweb_config.groovy
(sdweb.gui.zoom.max, default=300).
NOTE: should only be changed by Softpro!
-->
<parameter key="Max.Value" value="300"/>
<parameter key="Min.Value" value="75"/>
<!-- This factor is multiplied with the initial zoomfactor (1.5 * 100% = 150%)
when pages are requested.
A higher value results in a better image quality when scaling.
This setting is only used if the default zoomlist entry is set to PINCH_SPREAD.
-->
<parameter key="PinchSpread.Factor" value="1.5"/>
</element>
```

Swipe Configuration in mobile_configuration.xml

```
<component id="Miscellaneous">
.....
<element id="Swipe.Gesture">
<!-- Specify if the swipe gesture for changing pages should be enabled. -->
<parameter key="Enabled" value="false"/>
<!-- The maximum duration in milliseconds between touch start and touch end to
identify a swipe event
when using 1-finger swipe (IPad, Android > 4.0). -->
<parameter key="Duration.Threshold" value="600"/>
<!-- The maximum duration in milliseconds between touch start and touch end to
identify a swipe event
when using 3-finger swipe (Windows, Android < 4.1). -->
<parameter key="Duration.Threshold.3Finger" value="600"/>
<!-- The minimum distance factor between touch start and touch end event to
identify a swipe event when
using 1-finger swipe (IPad, Android > 4.0).
The specified factor is multiplied with the available screen width to get the
minimal distance in pixel which
is needed to identify the swipe gesture. If the current image width is less than
the screen width the specified
factor is multiplied with the current image width.-->
<parameter key="Distance.Threshold.Factor" value="0.1"/>
<!-- The minimum distance factor between touch start and touch end event to
identify a swipe event when using
3-finger swipe (Windows, Android < 4.1).
The specified factor is multiplied with the available screen width to get the
minimal distance in pixel which
is needed to identify the swipe gesture. If the current image width is less than
the screen width the specified
factor is multiplied with the current image width.-->
<parameter key="Distance.Threshold.Factor.3Finger" value="0.1"/>
</element>
```

NOTES

PinchSpread is only possible if the current touch position is not in conflict with editable fields.

Swipe and PinchSpread gestures are also available when adding new capture fields.

The default zoom factor of PinchSpread is FIT_TO_WIDTH. This default is always used when:

- First page is initially displayed
- Page is changed
- Pages are pre-fetched
- Screen is rotated

Scaling the page via PinchSpread normally doesn't reload the page from the server.

The page is only reloaded if the user changes a field and scales the page afterwards (therefore the actual user changes are not visible in the scale view).

When PinchSpread is enabled the toolbar actions ZoomIn and ZoomOut can't be used any more (they are disabled) and should be removed from toolbar configuration.

Toolbar Action

A new toolbar action FIT_TO_WIDTH has been added. This action can be used to reset the current zoom factor to FIT_TO_WIDTH. It is not visible per default.

Toolbar Configuration in mobile_configuration.xml

```
<component id="Toolbar">
...
<element id="TA_ZoomToWidth">
<parameter key="Visible" value="false"/>
<parameter key="Tooltip" propertyFile="language"
propertyKey="Toolbar.TA_ZoomToWidth.Tooltip"/>
<parameter key="Label" propertyFile="language"
propertyKey="Toolbar.TA_ZoomToWidth.Label"/>
<parameter key="Description" propertyFile="language"
propertyKey="Toolbar.TA_ZoomToWidth.Mobile.Description"/>
<parameter key="Description.Android" propertyFile="language"
propertyKey="Toolbar.TA_ZoomToWidth.Mobile.Description"/>
</element>
```

2.4 Sample Portal Page

SignDoc Web delivers the SignDoc Web demo page, that gives a user the possibility to create documents by loading the PDF documents into the browser window.

The same demo page offers also the possibility to use additional options for creating the new documents, for example to create the document with some specific Document ID. The created documents can be also reopened when specifying the existing document ID.

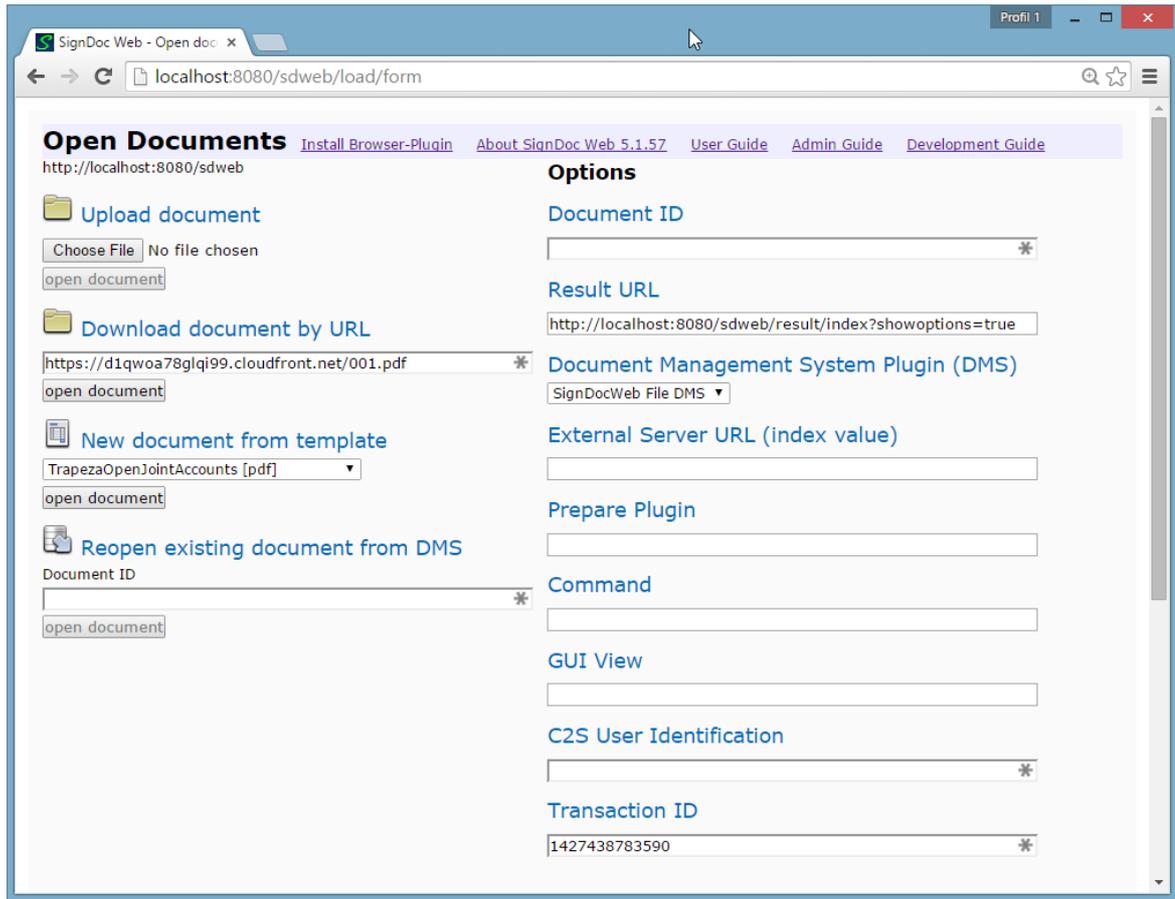
The general syntax to start the SignDoc Web demo page is:

```
http://<server>:<port>/sdweb
```

Example

```
http://localhost:8080/sdweb
```

The browser window will be started and the SignDoc Web demo page will be opened:



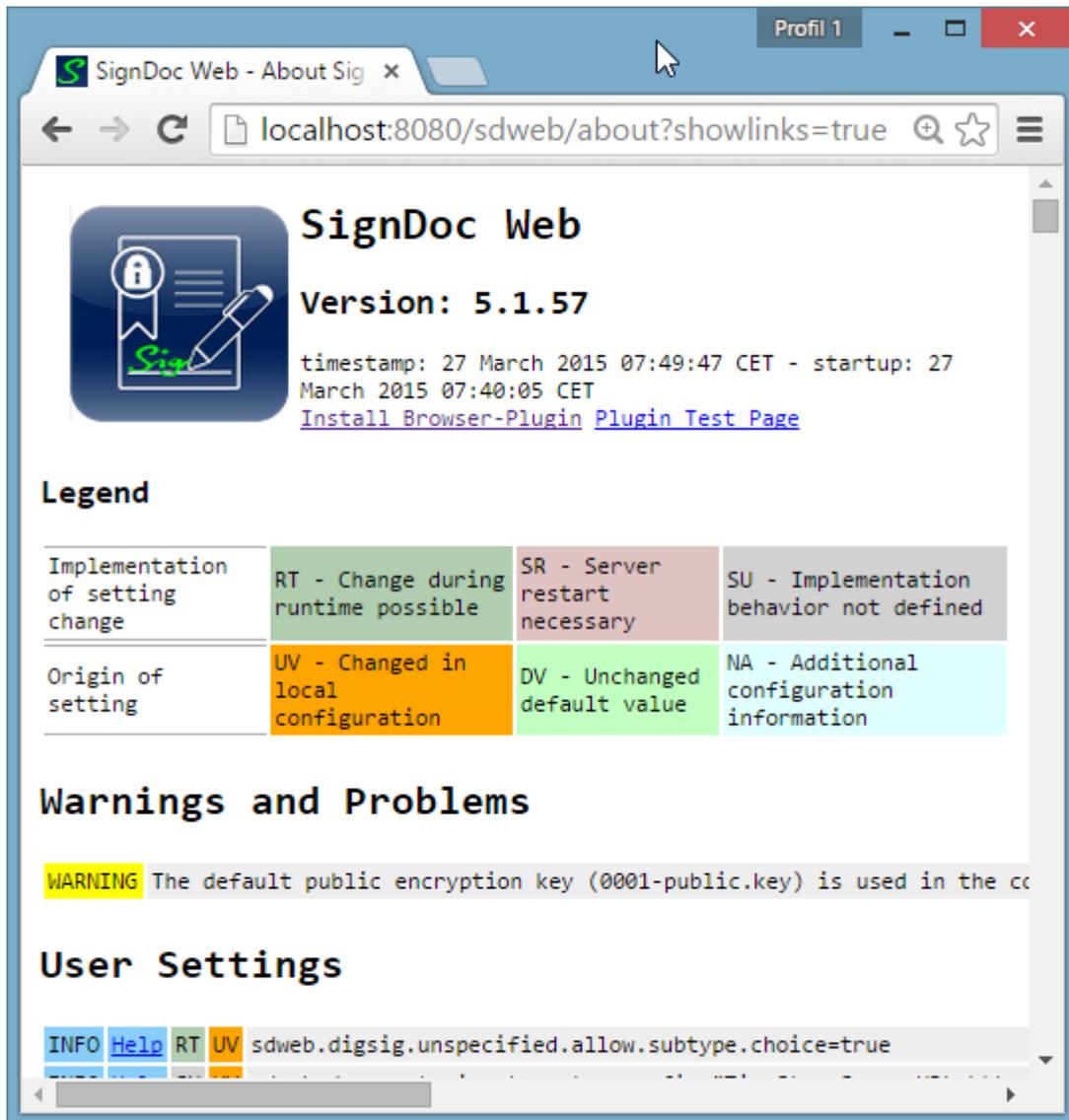
The SignDoc Web demo page is divided into 2 sections:

- [Open Documents](#)
- [Options](#)

2.4.1 About Page

The **About SignDoc Web** page provides detailed information about the currently installed SignDoc Web application and it is divided into several sections:

- Legend
- Warnings and Problems
- User Settings
- License information
- Plugin information
- Server Configuration information
- General information



2.4.2 Open Documents

The SignDoc Web demo page supports different ways of loading and displaying a PDF document.

The screenshot shows a web interface with four main sections:

- Upload document:** Includes a folder icon, a text input field, and a "Browse..." button. Below the input field is an "open document" button.
- Download document by URL:** Includes a folder icon, a text input field containing the URL "https://d1qwoa78glqi99.cloudfront.net/001.pdf", and an "open document" button.
- New document from template:** Includes a document icon, a dropdown menu showing "TrapezaOpenJointAccounts [pdf]", and an "open document" button.
- Reopen existing document from DMS:** Includes a document icon, a "Document ID" label, a text input field, and an "open document" button.

Upload Document

Using the  **Upload document** option it is possible to load and display a preferred PDF document into SignDoc Web by selecting this document via file selection dialog. To upload a document, please perform the following steps:

- Click the **Browse...** button
- Standard file selection dialog will be opened
- Please browse for a preferred PDF file
- Click the **open document** button
- The selected PDF document will be loaded and displayed in the SignDoc Web application

Download Document by URL

Using the  **Download document by URL** option a PDF document can be downloaded by URL and displayed in the SignDoc Web application. To download a document by URL, please perform the following procedure:

- Specify a download URL in the text field (see Integration in external Web Application for a detailed description of how to make proper URL requests)
- Click the **open document** button
- The selected PDF document will be downloaded and displayed in the SignDoc Web application

New Document from Template

With the  **New document from template** option a predefined template, that is installed on the server, will be loaded and displayed in the SignDoc Web application. To create a new document from a predefined template, please perform the following steps:

- Select from the drop down list one of the available PDF templates
- Click the **open document** button
- The selected PDF document will be loaded and displayed in the SignDoc Web application

Reopen Existing Document from DMS

With the  **Reopen existing document from DMS** option it is possible to reopen a document, that is stored in the internal document management system (DMS).

To reopen a document, please perform the following steps:

- Specify the Document ID of the document that you would like to reopen in the text field **Document ID**
- Select the document management system plugin (default: SignDoc Web File DMS)
- Click the **open document** button
- The PDF document with the specified Document ID will be opened

2.4.3 Options for Documents

Besides the possibilities already described in [Open Documents](#) SignDoc Web supports additional options for creating documents.

Documents can also be created by specifying the preferred **Document ID** or the **Result URL**. The additional document creation options are grouped in the section **Options**.

Options

Document ID

Result URL

Document Management System Plugin (DMS)

External Server URL (index value)

Prepare Plugin

Command

GUI View

C2S User Identification

Transaction ID

The following table describes the supported options:

Option	Default Setting	Description
Document ID	Document ID is generated at the Server side. It is a timestamp-based ID.	This option offers a possibility to specify the preferred Document ID for the new document.
Result URL	SignDoc Web internal result page	This option allows to define the web page that should be displayed after the document processing is finished. The page will be displayed onerror, oncancel and onsuccess events. The page will get the document ID and the result code (onerror, oncancel, onsuccess) as parameter.
Document Management	SignDoc Web File DMS Plugin	This option offers a possibility to select the DMS plugin that is used for the documents storing and (optionally)

Option	Default Setting	Description
System Plugin (DMS)		retrieving from document management system.
External Server URL (index value)		This option can be used to specify the ESU (External Server URL) parameter which is helpful in a Proxy environment.
Prepare Plugin		With this option a prepare plugin can be specified. Default: not set
Command		Using Command option it is possible to insert or to update form elements or signature fields.
GUI View		Possible values are showjsmobile, showjs. showjsmobile: will display the mobile version of the gui showjs: will display the desktop version of the gui
C2S User Identification		Optional parameter for C2S workflows identifying the user For more information see <i>Administrator's Guide</i> , section "HTTP Servlet Parameters".
Transaction ID		Optional parameter for workflows identifying the transaction context For more information see <i>Administrator's Guide</i> , section "HTTP Servlet Parameters".

To create the document with a specific **Document ID** and a specific **Result URL**, please perform the following steps:

- Specify the preferred **Document ID** into the corresponding text field **Document ID**.
- Specify the preferred **Result URL** (for example http://www.myurl.com) in the corresponding text field **Result URL**.
- Select one of the 3 methods for the document loading into SignDoc Web as described in [Open Documents](#).
- Click the **open document** button below the corresponding method.
- A PDF document will be loaded and displayed in the SignDoc Web application. This document will have the Document ID as it has been specified in the **Document ID** field and when the document processing will be finished (for example, document will be sent to archive or the document processing will be canceled) the application will redirect to URL as it has been specified in **Result URL** field.

SignDoc Web by default uses **SignDoc Web File DMS Plugin** for the documents storage and retrieval from the document management system (DMS). This plugin helps to archive the documents into the so called internal document repository (or internal document management system), which is a preconfigured directory on the file system. Usually the directory for the documents storage is set during SignDoc Web installation process. Please see *SignDoc Web - Developer's Guide*, chapter *DMS - Plugin Interface* for more information about the DMS Plugin.

Inserting or updating of the form elements with the **Command** option can be executed in several ways:

Inserting a new Signature Field

- by coordinates
- with position located by text phrase

Updating

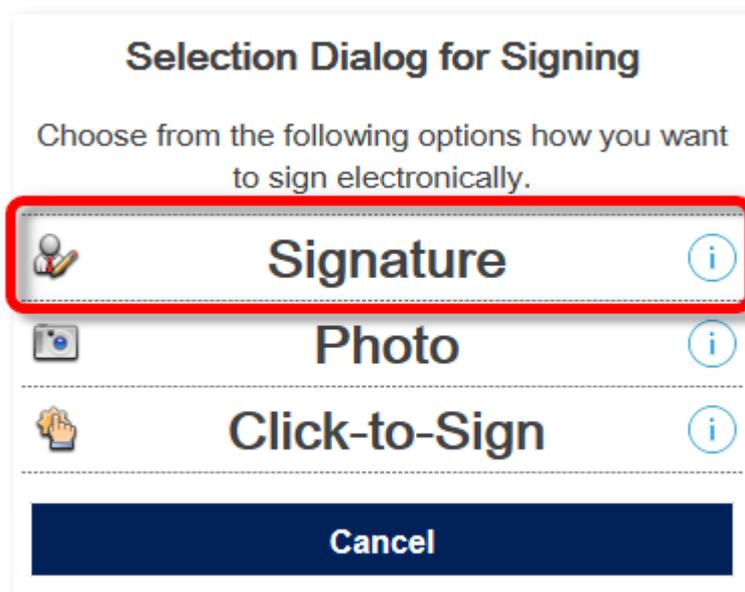
- Change the value and/or attributes of an existing form field (also signature field)
- Convert an existing form field to a signature field
- Setting metadata

3 Ways to Sign

This chapter describes the various ways that SignDoc Web can be used to sign a document.

3.1 Sign With Your Handwritten Signature

The user can be prompted for the below dialogue which shows the various ways to sign a generic capture field:



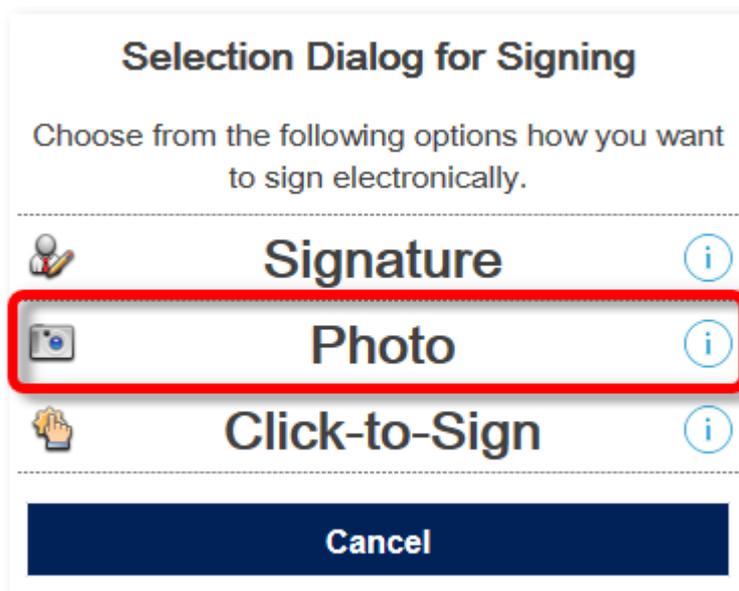
The most common way to sign a signature field is by using a handwritten signature. This signature can be provided by utilizing a signature pad, an inbuilt digitizer of your TabletPC/Smartphone/iPad or via the Sign2Phone App:

Signature of Applicant



3.2 Take a Photo to Sign

The user can be prompted for the below dialogue which shows the various ways to sign a generic capture field:



It is possible to provide a photo as one of the capture methods.

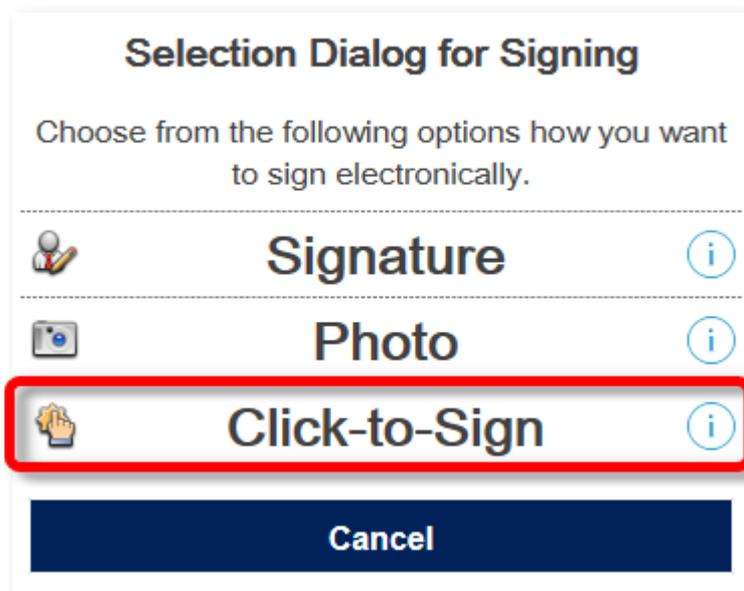
This is done via utilizing an inbuilt or attached camera of the PC as well as the camera of a smartphone or iPad:

ID card / photo of Applicant



3.3 Enter Your Name - Click-to-Sign

The user can be prompted for the below dialogue which shows the various ways to sign a generic capture field:



The Click-to-Sign method allows the user to enter his name which will in turn be placed in the document as a Click-to-Sign signature stamp:



4 SignDoc Web and Sign2Phone

If you would like to sign a document with a mobile device using Sign2Phone proceed like described in chapter [Signing a Document](#) up to step 8 and then continue with chapter [How to use Sign2Phone](#).

4.1 Introduction to Sign2Phone

Smartphone as Pad Alternative

- Sign2Phone is an App which can be installed on your smartphone.
- It turns your smartphone into 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.
- The Sign2Phone App supports an iPhone and works with SignDoc.

How it works - Overview

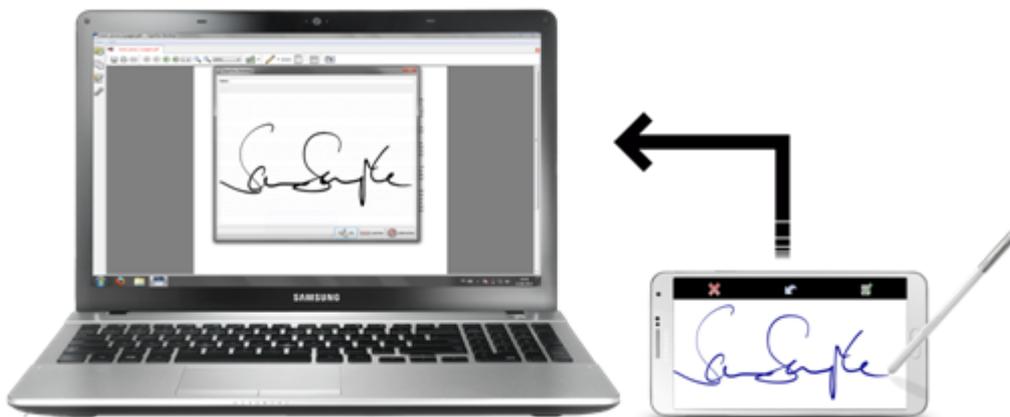
- The Sign2Phone app is available from the [Apple App Store](#) and [Google Play Store](#) store and must be installed on the mobile device.
- The app is started on the device by touching the Sign2Phone icon.
- The app is "paired" with the SignDoc application via the network.



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



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



Sign2Phone Connectivity

- In order for Sign2Phone to work, network connectivity is required between the computer where the signature is captured and the mobile device.
- This connectivity is achieved via WiFi i.e. both the computer and the mobile device 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.

4.2 How to Use Sign2Phone

SOFTPRO 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_\(software\)](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.



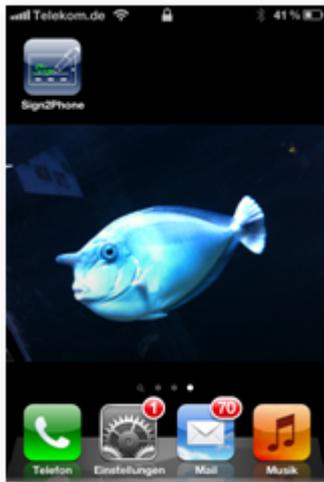
1. Startup on iOS device

Sign2Phone App is available as free download from the from the [Apple App Store](#) and [Google Play Store](#) store.

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.

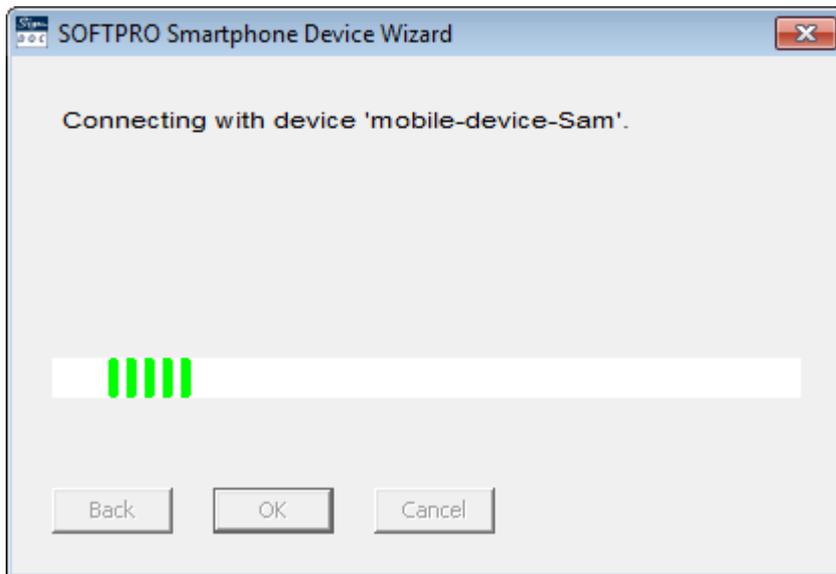
The desktop application will open a new dialog where you are prompted to enter this pairing code.

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.

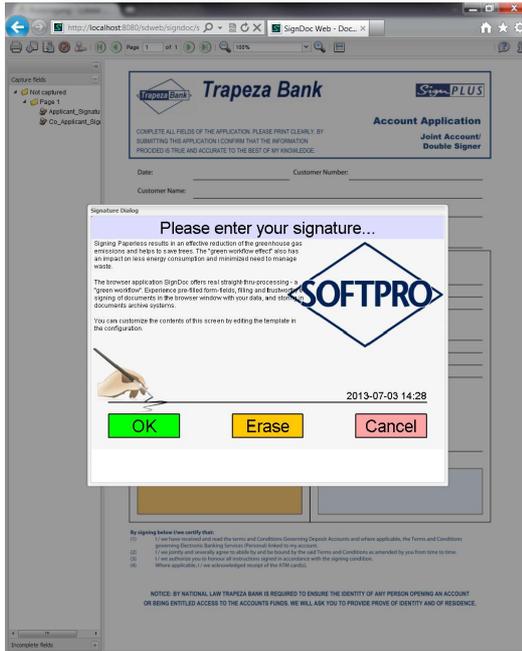


Click **Next** to create a connection with the signature capturing device.

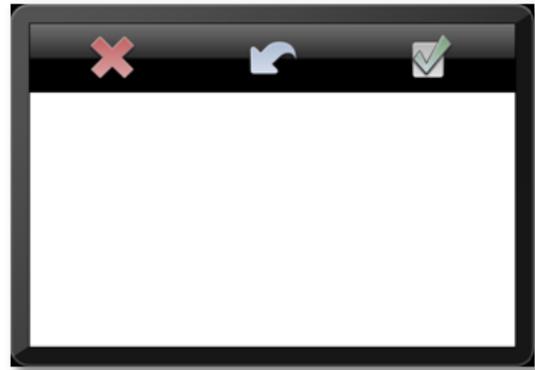


3. Signing procedure

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



SignDoc Web



Sign2Phone App

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.



SignDoc Web



Sign2Phone App

5. Signed document

Once received the document places the signature in the document as an electronic signature.

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  on the smartphone.

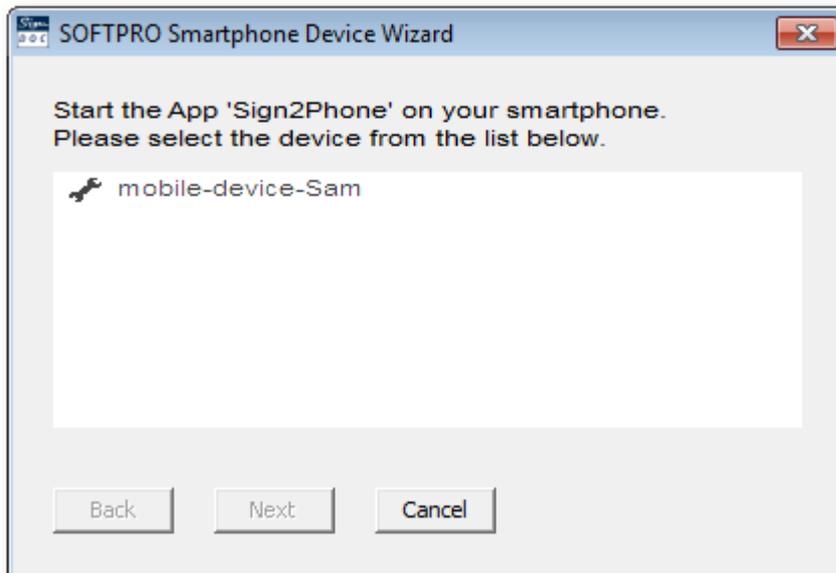


A new pairing code is created and can be entered in the desktop application.



NOTE

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



4.3 Sign2Phone Administration

Configuration

If SignDoc should use mobile devices as the only device for signature capturing you can define this in the SignDoc configuration file. To do this set:

```
sdweb.browserplugin.padclass="SPTabletRemoteTablet"
```

Connectivity

A preliminary to run Sign2Phone with Kofax SignDoc Device Support is, that the mobile device and the PC access the same network.

We recommend to use existing WiFi infrastructure to connect your mobile device with your Kofax SignDoc Device Support 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 iOS device and your computer on which the Kofax SignDoc Device Support is installed.

There are 3 possibilities to set up such local network environment (depending on your iOS 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 iOS device and connect your computer to this WiFi
- USB Cable: Enable personal hotspot functionality on your iOS device and use the USB cable to connect to your computer
- Bluetooth: Enable personal hotspot functionality on your iOS device and connect it to your computer via Bluetooth

The mobile device communicates with the application via TCP Port 46998 (service name is sp-remotetablet) and UDP Port 5353 (for Bonjour service). 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.

4.4 Sign2Phone Troubleshooting and FAQ

Troubleshooting

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

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 Kofax SignDoc Device Support 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.
 - If not, please close SignDoc Web Pairing Dialog and click again in the signature field.
 - 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.

5 Appendix

[Contact Information](#)

[Trademarks](#)

[Legal Notices](#)

5.1 Contact Information

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

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

<https://techsupport.kofax.com>

5.2 Trademarks

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