# Introduction Guide

# pDoc Signer

**www.topazsystems.com**

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## Overview

pDoc Signer is a Windows desktop application for securely signing PDF documents with electronic signatures written on an electronic signature pad connected to your PC or on the touch screen of a Windows tablet.

With pDoc Signer you can
- Sign existing digital signature fields in PDF documents
- Create, place, and sign new digital signature fields in PDF documents
- Enter text comments in PDF documents
- Fill in standard form fields: text boxes, check boxes, radio buttons, list boxes, and combo boxes
- Utilize advanced features to add value to PDF documents:
  - Insert sticky note comments
  - Use the Pencil Tool to create free-form drawings
  - Attach PDF files and other types of files
  - Extract pages from and insert pages into a PDF document
  - Secure documents with passwords

**Note:** Using our companion software application, pDoc Forms Designer, you can create forms for signing in pDoc Signer using the following form field creation capabilities:
- Create and place new digital signature fields in PDF documents without having to use expensive PDF document applications
- Create and place standard form fields: text boxes, check boxes, radio buttons, list boxes, and combo boxes

*Try It! Create and place fields in our pDoc Signer Sample Document (see pages 8-9).*

For detailed information about using pDoc Signer, see the pDoc Signer User Manual which you can access on our website.

## pDoc Signer Features

1. **Independent validation → standard digital signature fields for signing**
   a. PDF documents signed with pDoc Signer can be opened by other software programs for independent validation of the embedded encrypted signatures and verification that the documents have not been altered since the signatures were applied.

2. **Sign anytime anywhere → Internet connection not required at time of signing**
   a. As a desktop/laptop/tablet application, pDoc Signer collects signatures and embeds them into PDF documents without requiring Internet connectivity for signing, enabling you to collect signatures anytime anywhere.

3. **Unique signatures → Collects biometric information for every signature instance**
   a. Like handwritten signatures, every pDoc Signer signature is distinguishable. There is no replication of signature images or selection of signature fonts; each and every signature is the result of a specific instance of your writing. In addition to storing biometric information, pDoc Signer records the name and email address of the signer and the time the signature was collected.

## Signing Existing Digital Signature Fields in PDF Documents

pDoc Signer displays an existing digital signature field as a blue rectangle with a red "Sign Here" arrow in the upper left corner.

To sign an existing digital signature field, simply:

1. Click on the signature field; a Signature Capture Window will appear on the screen and the attached signature pad will be enabled.

2. Write your signature on the signature pad; as you write your signature, pDoc Signer displays it in the Signature Capture Window.

3. Click on the OK button in the Signature Capture Window; pDoc Signer will close the window, securely embed the signature in the PDF document, and display the signature in the signature field.

Here is a sample signature field for you to sign:

## Creating, Placing, and Signing New Digital Signature Fields in PDF Documents

To create, place, and sign a new digital signature field, simply:

1. Click on the Insert & Sign icon (the pen superimposed over a sheet of paper).

2. Move the cross-hair cursor to the point on the page where you want to position the upper left corner of the signature field.

3. Click and hold the left mouse button, drag the mouse down and to the right to the point where you want the lower right corner of the signature field, and release the mouse

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button; a Signature Capture Window will appear on the screen and the attached signature pad will be enabled.

4. Write your signature on the signature pad; as you write your signature, pDoc Signer displays it in the Signature Capture Window.

5. Click on the OK button the Signature Capture Window; pDoc Signer will close the window, securely embed in the signature in the PDF document, and display the signature in the signature field.

## Entering Text Comments in PDF Documents

To enter a text comment in a PDF document:

1. Click on the text comment icon (the capital letter "T") on the toolbar.

2. Move the cross-hair cursor to the point on the page where you want to position the upper left corner of the text comment.

3. Click and hold the left mouse button, drag the mouse down and to the right to the point where you want the lower right corner of the text comment, and release the mouse button. pDoc Signer will place a text comment box at the specified location and open a Text Comment Window.

4. Using your keyboard, enter your text comment in the Text Comment Window, and then click on the Add button to place the text in the document and close the Text Comment Window. Note that you can choose the font used in the text comment by selecting Tools → Preferences → Comments from the menu bar.

## Filling in Form Fields

1. **Text Fields**
   a. A text field is a box or space in which the user can enter text from the keyboard. pDoc Signer supports both single-line and multi-line text fields.

**Here is a single line text field into which you can enter text:**

What's your favorite color?

**Here is a multi-line text field:**

Describe the effect of the Hundred Years War:

pDoc Signer supports clone text fields, so that when you enter text into one field, and then move control to another part of the document, the text will be replicated in the clone field.

**Here are two clone fields with which you can experiment:**

Clone Text Box #1:

Clone Text Box #2

2. **Radio Buttons**
   a. Radio button fields contain a set of related buttons, each of which can be on or off. At most one radio button in a set can be on, although initially they can all be off. Selecting any one of the buttons in the set automatically deselects all the others, so radio buttons represent mutually exclusive categories.

   **Here is an example:**

   In what time zone do you live?

   Eastern        Central        Mountain        Pacific        Other

3. **Check Boxes**
    a. Check boxes toggle between two states, on and off. A check box field is a group of one or more check boxes, each of which can be independently toggled, simply by clicking a box.

       **Here is a field of check boxes you can try:**

       What veggies do you like?
       (Check all that apply)

                                        Tomatoes       Carrots       Corn       Spinach

       pDoc Signer supports clone check boxes, so that when you toggle one check box, its clone check box toggles the same way. Here's an example in which the first and last check boxes are clones:

       In what department
       do you work?

                                     Redundancy       Sales       Operations       Dept. of
                                     Dept.             Dept.       Dept.       Redundancy

4. **List Boxes**
    a. A list box presents multiple choices to the user using a drop-down list of selectable values. Depending on the size of the list box and the number of options, a list box may be scrollable. List boxes may allow selection of one or multiple items from the list.

       pDoc Signer supports normal and scrollable list boxes as well as single and multiple selection list boxes.

       **Here are some examples:**

       In what state do you live?

       What degrees have you earned?

5. **Combo Boxes**
   a. A combo box is a single line text field that expands to a list box (showing a list of selectable values) by clicking the down arrow button on the right of the field. In addition to selecting one item from the drop down list, the text box part of the field can be editable to enter data other than the predefined choices.

   **Here are some examples:**

   What type of loan do you want?                In what county do you live?

## pDoc Signer Sample Document

Thank you for trying a live demonstration of pDoc Signer, which allows you to sign PDF documents electronically with your own unique biometric signature. pDoc Signer supports signing any document in PDF format - whether it is a loan application, invoice, expense report, consent form, waiver, etc. - making it a valuable tool for any business.

In this demo document, the next page presents a sample health history form, such as you might complete when you visit a doctor's office. The form has fields for signatures, text boxes (single line and multi-line), check boxes, radio buttons, list boxes, and combo boxes. This form was created using pDoc Forms Designer.

To save your changes to the demo document, simply select File → Save As, and enter the new name and location for your file. Then you can reload the demo document from the About menu.

## pDoc Signer Sample Document – Health History

**1. Patient Information**

Name

Street Address
City, State, ZIP

**2. Medical History**

| | | | |
|---|---|---|---|
| Insomnia | No | Yes | Comments: |
| Weight Change | No | Yes | Comments: |
| Drug Allergies | No | Yes | Comments: |

**3. Family History**

Check for family members still living

Mother
Father
Maternal Grandmother
Maternal Grandfather
Paternal Grandmother
Paternal Grandfather

**4. Payment Method**

**5. How did you hear about us** (select all that apply)

**6. Approval Signatures**

We affirm that the information above is correct and that we are responsible for timely payment of all bills for treatment of patient.

_____          _____
Patient                                                      Patient Representative