User Guide

pDoc Signer® for Apple iPad

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1 – Introduction

pDoc Signer is an app for securely signing and form field filling PDF documents on an Apple iPad. Documents signed and form filled using pDoc Signer use the standard PDF form fields for signing and filling, so that they can be opened by other software programs for independent review and verification that the documents have not been changed since the signatures were applied.

With pDoc Signer you can:

- Sign existing digital signature fields in PDF documents
- Create, place, and sign new digital signature fields in PDF documents without having to use expensive PDF document applications
- Fill in standard PDF form fields: radio buttons and boxes (text, check, list, combo)
- Navigate easily through very large PDF documents

1.1 - Features

- **Independent validation** → standard digital signature fields for signing.

  PDF documents signed with pDoc Signer can be opened by other software programs for independent validation of the embedded signatures and verification that the documents have not been altered since the signatures were applied.

- **Sign anytime anywhere** → Internet connection not required at time of signing.

  In mobile applications where an Internet connection is not available, pDoc Signer collects signatures in an offline mode, so that you can distribute signed documents at a later time.

- **Unique signatures** → Collects biometric information for every signature instance.

  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 biometric information, pDoc Signer records other signature information such as the name and e-mail address, the time the signature was collected, and the physical location if available.

- **Signature creation** → Signature fields you create can be resized, reshaped, and relocated.

  The flexibility to manipulate new digital signature fields provides an easy method for fitting signatures into existing forms.

2 – Getting Started

2.1 – Supported Devices and OS Versions

- iPad and iPad Mini – iOS 9.0 and higher

2.2 – Installing the pDoc Signer App

To use the Apple iPad for signing documents, you must download the pDoc Signer App onto your iPad device. The pDoc Signer app is available from the Apple App store for a one-time license fee; there are no recurring or usage charges.

2.3 – Signature Capture and Embedding

The pDoc Signer App is designed to enable PDF documents to be electronically signed locally on an iPad in three easy steps (see sections 2.5 and 2.6).

2.4 – Menu Toolbar
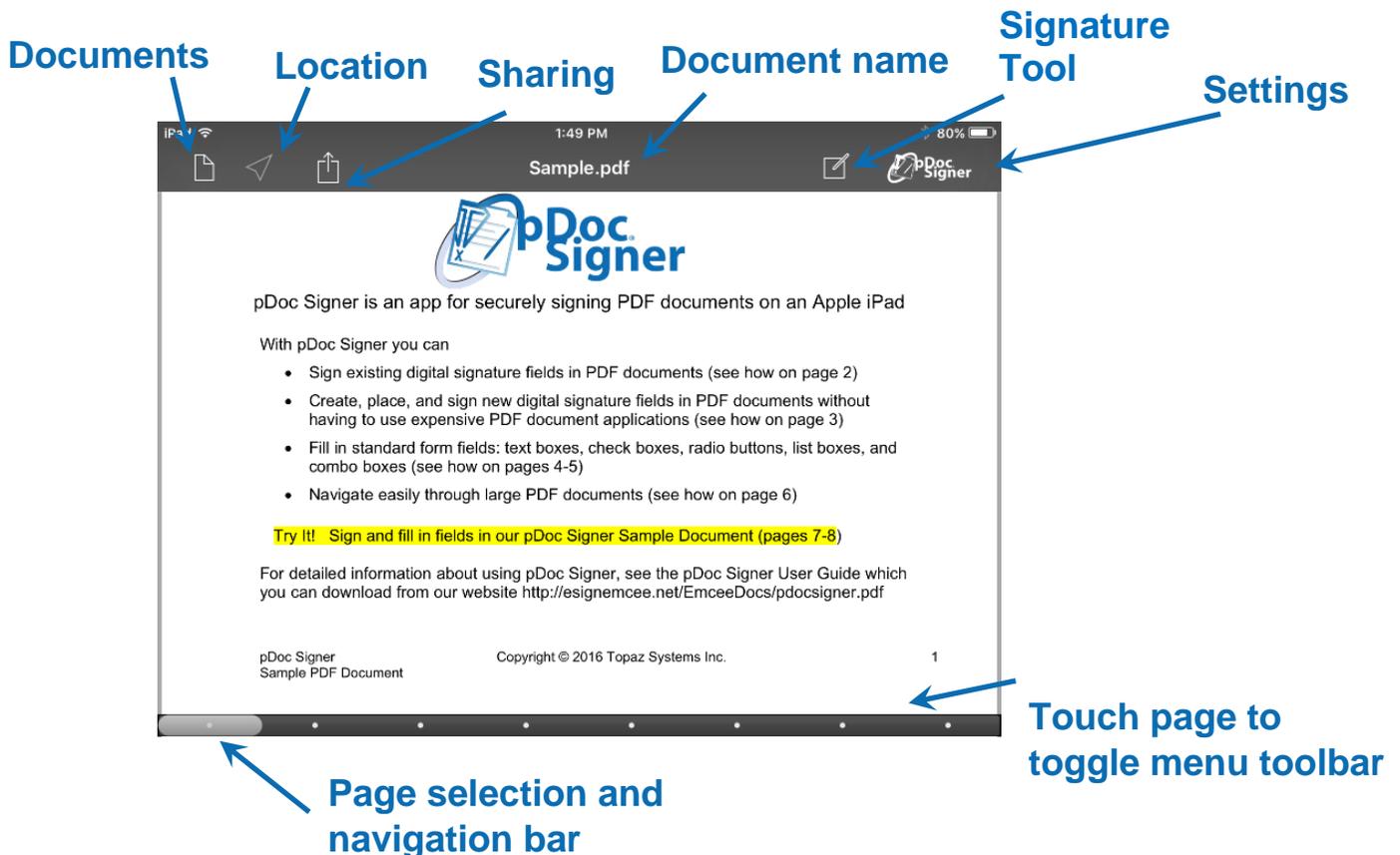
2.5 – Quick Steps for Signing Existing Digital Signature Fields in PDF Documents

Step 1: Capture the signature

- Touch a signature field, which is indicated by a black rectangle.
- A "Sign Here" window will open.
- Write your signature in the "Sign Here" window using your finger or a stylus
- Touch the "Done" button.
- The "Sign Here" window will close and the signature will be placed in the signature field.

   Note: You do not have to be connected to the Internet to capture the signature.

Step 2: Distribute the signed PDF document

- Touch the "Share" icon.
- A share menu options window will open.
- To e-mail the signed PDF document
  - Touch the "E-mail Document" button.
  - A "New Message" e-mail window will open.
  - Enter the e-mail information (addresses, subject, and message) into the e-mail form.
  - Touch the "Send" button to send the e-mail.
- To open the signed PDF document in another application
  - Touch the "Open Document In …" button.
  - A window will open that displays program icons on your iPad that can open a PDF document.
  - Touch the icon of the desired program, and it will open the signed PDF document.
- To lock the signed PDF document
  - Touch the "Lock Document" button.
  - A "Warning" window will open that describes the effect of locking the document.
    Note that a locked document cannot be unlocked before distributing.
  - Touch the "Lock" button to lock the signed PDF document, or touch the "Cancel" button to cancel the operation.

2.6 – Quick Steps for Signing New Digital Signature Fields in PDF Documents

Step 1: Create the new signature field and capture the signature

- Touch the "Sign" icon (the hand holding a pen) on the menu bar at the top right of the screen.
- A "Sign Here" window will open.
- If you want to sign the document immediately, write your signature in the "Sign Here" window using your finger or a stylus.
  Note: You do not have to be connected to the Internet to capture the signature.
  Note: If you want to create a new empty (unsigned) signature field, simply proceed without signing or touching the "Cancel" button. In this case, a new empty signature object will appear with an icon showing a hand holding a pen, until the document is modified or distributed, which will embed the empty signature field into the document to make it ready for signing.
- Touch the "Done" button.
- The "Sign Here" window will close and the signature field will be placed in the middle of the portion of the document page visible on the screen.

Step 2a (optional): Fit and place the signature field in the document

- To move the signature field on the page, simply drag it to the desired location with your finger.
- To resize the signature field proportionally, use the standard Apple pinch-zoom gestures.
- To resize the signature field anamorphically, use the grip at the lower right corner of the signature field; note that the shape of the signature is not changed.
- To "lock" the signature in place, simply tap on the signature; you can toggle the locked/unlocked state by tapping on a signature at any time. An unlocked signature is denoted by a surrounding purple rectangle; for a locked signature, the rectangle is removed.

Step 2b (optional): Edit or delete the signature if desired

- Touch and hold the signature for at least one second.
- A signature menu options window will open.
- To delete the signature, touch the "Delete" button and follow the confirmation instructions.
- To edit the signature information details (name and e-mail address), touch the "Edit" button and enter the new information in the signature information window that opens.

Step 3: Embed signatures permanently for distribution

- Touch the "Share" Icon and select an option, either e-mail the signed document or send the signed document to another local app that supports PDF documents.
- The distribution ready document can then be sent by e-mail or opened in another app.
- To distribute the signed PDF document, see Step 2 in Signing Existing Digital Signature Fields.

3 – PDF Documents

pDoc Signer includes a powerful PDF document reader that can load very large documents for review before signing. Documents with hundreds of pages can be easily navigated in sequence or you can skip forward or backwards to direct pages using the page navigation scrollbar at the bottom of the page.

3.1 – Opening PDF Documents

The pDoc Signer App is designed to enable PDF documents to be electronically signed locally on an iPad in three easy steps (see sections 2.5 and 2.6). PDF Documents can be sent to pDoc Signer using the standard Apple file share interface between apps. For example, a PDF file received as an e-mail attachment can be sent to pDoc Signer by touching the attachment itself in the e-mail client to open the file in the Apple file preview app. From there it can be sent to pDoc Signer by selecting "pDoc Signer" from the app's Share icon "Open in …" menu option.

Note: PDF documents may be password protected. If a password protected document is selected to be opened by pDoc Signer, you will be prompted to enter the password protecting the document. Without the valid password, the document cannot be opened.

Once the PDF document is opened in pDoc Signer, a copy of the original document will also be available from pDoc Signer's "Document" icon under the "**Inbox**" folder, as shown in the following figure:
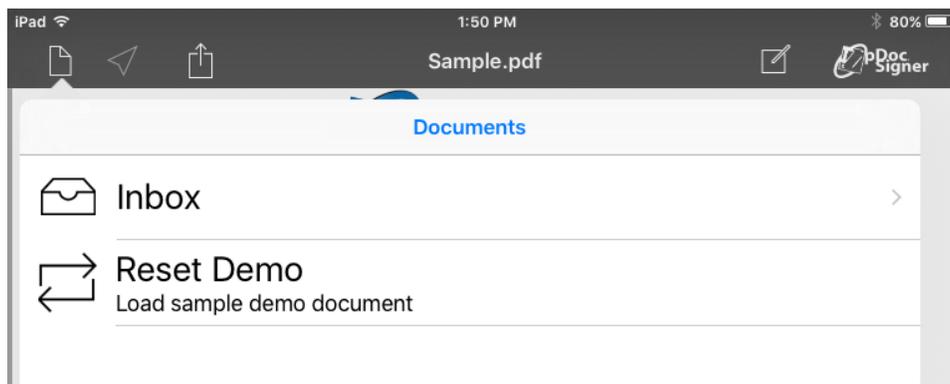

Note: A sample PDF document is included with the pDoc Signer app and can be loaded for demo purposes anytime by selecting the "Reset Demo" menu option in the Documents menu.

3.2 – Opening Cloud PDF Documents

pDoc Signer supports PDF documents stored in file cloud services (namely Apple's own iCloud Drive and Drop Box). To access documents available in these online repositories, select the corresponding folder from the Documents list like the local Inbox folder. For iCloud access, you need to be logged into the iCloud service using your Apple ID in the device settings and enable the iCloud Drive option. For Drop Box, you will be asked to login to the service on first use.

Note: Cloud documents listed in pDoc Signer's cloud folders are stored in a special "application folder" within the service's folder structures. When accessing files using their respective native apps or other supported apps, you will find a "pDoc Signer" folder. Only documents stored in this application folder will be available inside the pDoc Signer app.
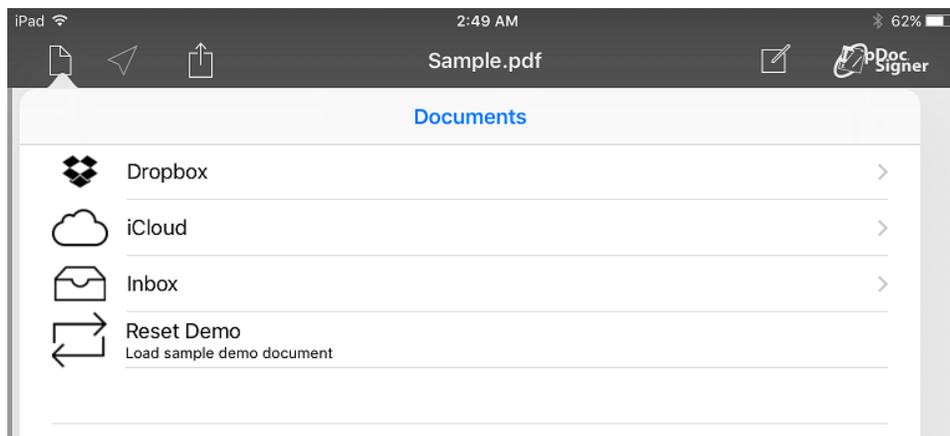

3.3 – Reading PDF Documents

The pDoc Signer App is designed to enable PDF documents to be electronically signed locally on an iPad in three easy steps (see sections 2.5 and 2.6).

For document navigation, note that there is a page selection display at the bottom of the page - a series of dots in which the highlighted dot represents the page currently displayed. If the document has a very large number of pages, there is a black scroll bar with a white vertical line representing the page currently displayed.

There are three ways to navigate among pages in a document:

Page-by-page: Swipe your finger from right to left across the page to move to the next page; swipe your finger from left to right across the page to move to the previous page. As you do this, the highlighting will change on the dots, or if the document has a large number of pages the white bar will move, indicating the new page selected. See the following figure.
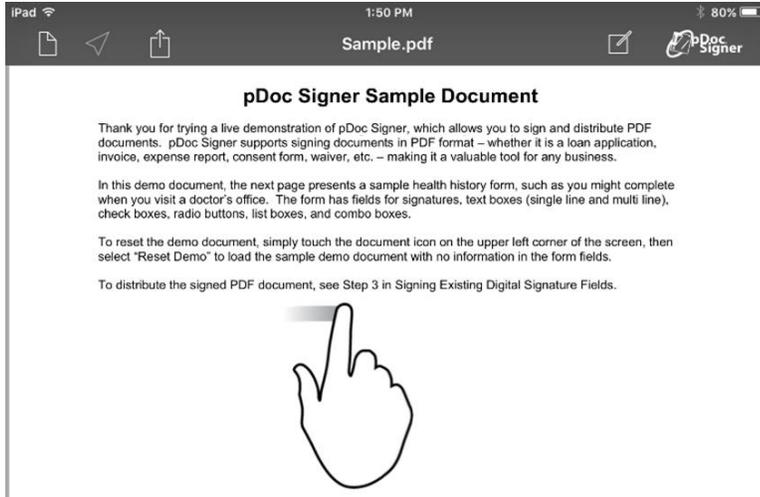

Page selection: Touch the dot that corresponds to the page you want to display, or if the document has a large number of pages touch the black scroll bar in the position of the page to be displayed.
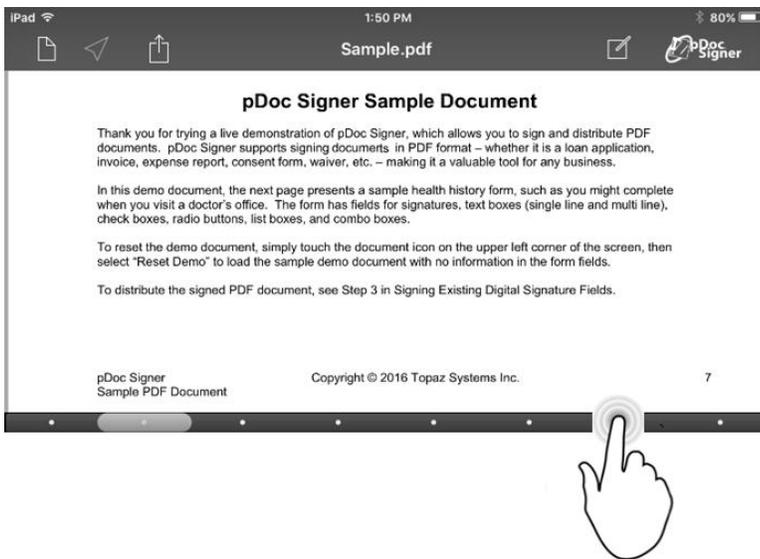
Page scrolling: Touch a dot on the page scroll bar or for documents with a large number of pages touch the white line on the scroll bar, and slide your finger left or right across the scroll bar. The screen will dim and a message will appear in the middle of the screen corresponding to the position of the white line on the scroll bar. As you move your finger left and right, the page number will change. Lift your finger when you reach the desired page, then the screen will brighten and display the selected page.
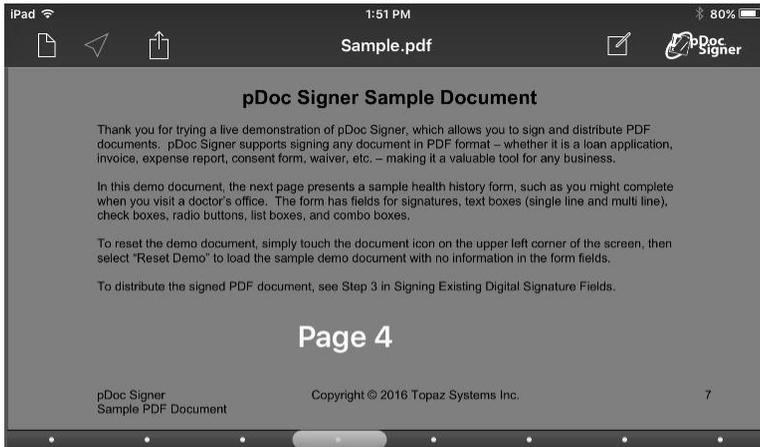
To zoom-in or zoom-out on a page, use the standard Apple pinch/zoom gestures. A page that is zoomed in can be scrolled in all directions using the single finger panning gesture.
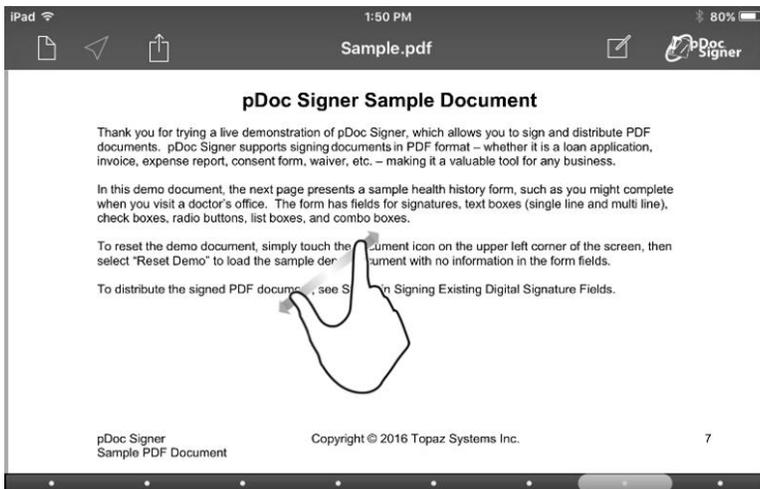
Note: *Page scrolling forward or back to other pages in the document resets the zoom level.*

4 – Capturing the Signature

pDoc Signer introduces a new way of electronically signing PDF documents. Unlike other document signature products that annotate documents with images of signatures, pDoc Signer captures signatures in real time at the biometric data level. This enables pDoc Signer to represent signatures on document pages as independent objects that can be resized and repositioned at will while maintaining at all times the true representation of the signer's signature. This novel approach allows signers full control over the appearance and placement of their signatures in documents.

4.1 – Creating a Signature Object

To sign a document, first navigate to the desired page within the document that you want to sign and touch the "Sign" button. This will open the signature capture window.


4.2 – The Signature Capture Window

Capture a signer photo
Changes the signature line color
Changes the signature line size
Clears the signature or photo
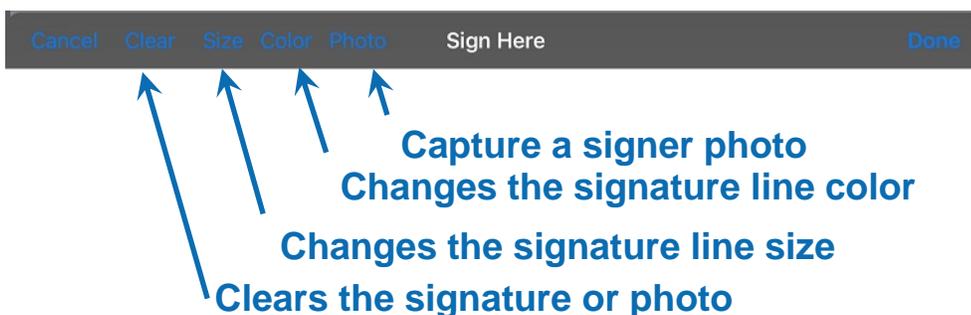
4.3 – Adding a Signer Photo to a Signature

To add a photo to a signature, touch on the Photo button to take a picture of the signer. The captured photo will be cropped to include only the section indicated by the preview portrait guidelines.
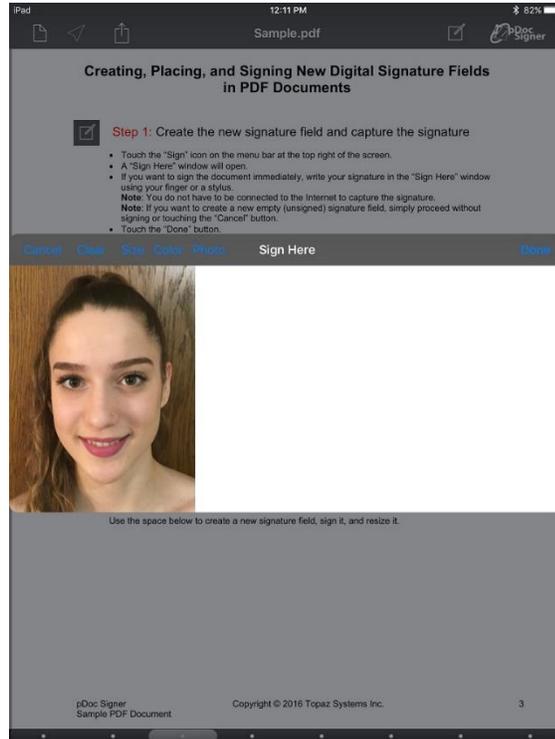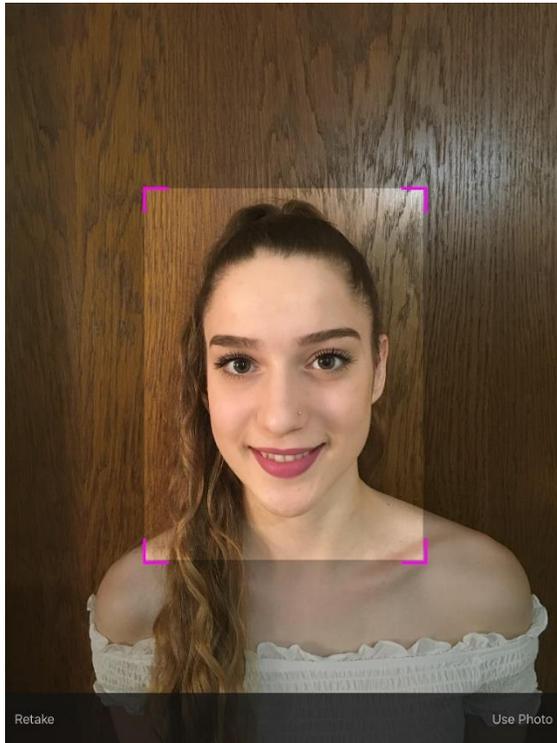

4.4 – Signing

To sign, simply draw your signature within the capture window using your finger or stylus. The captured signature data is automatically rendered in real time as you sign within the window. At any time, you can clear your signature or change the size or color of the signature strokes, and re-sign. To clear the photo, touch the Clear button twice. To cancel signing in this signature window, touch the "Cancel" button. To complete this signature and place the signature within the document page touch the "Done" button.

Note: Before a signature object is placed on the document page, an integrity check is performed on the captured signature data and a warning may be displayed if unusual signing activity is detected. The signature object can be deleted and a new signature captured if the signing style is not normal for your particular signature.

4.5 – Signing Existing PDF Signature Fields

pDoc Signer also supports signing of existing PDF digital signature fields. These unsigned fields are automatically detected in a PDF document and indicated with a black empty frame within the page where they are defined.
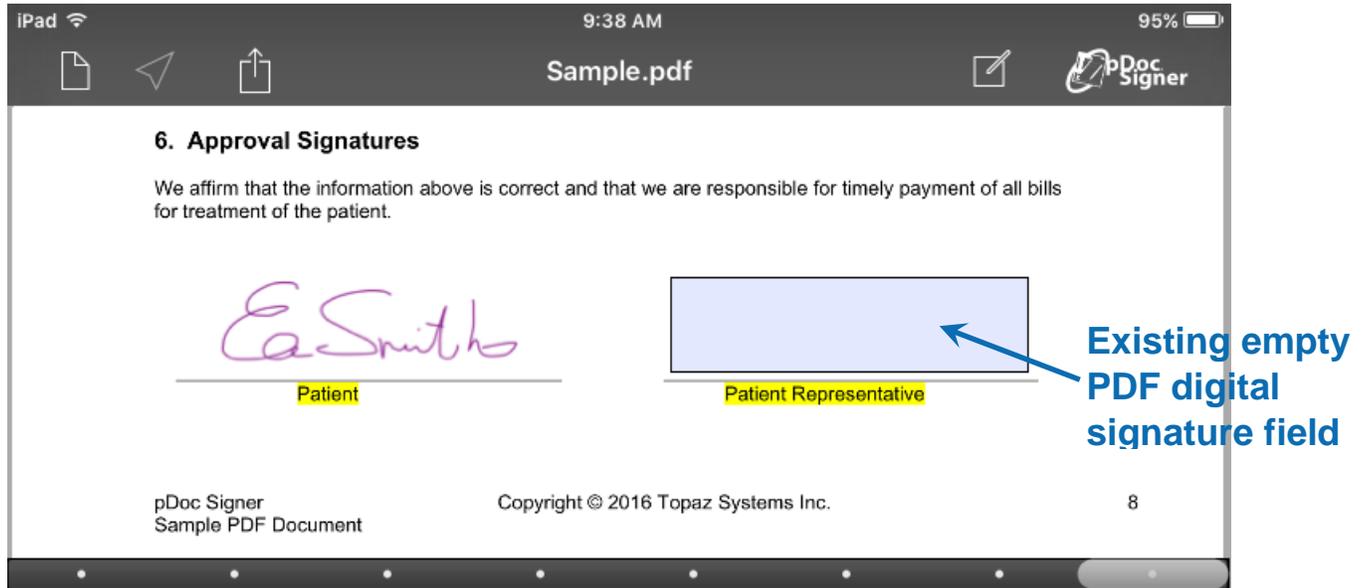

To sign an existing signature field, simply touch the field to open the signature capture window and sign as usual. Similar to signature objects, signed signature fields also contain signature details that can be edited. Deleting a signed signature field returns the field to its original unsigned state and does not remove the field from the document. See section 5.1 for details about editing or deleting signature objects.

Note: *Signature objects associated with existing PDF digital signature fields cannot be moved or resized. Their location and dimensions are defined by the existing PDF signature field.*

5 – Placing the Signature

After a signature is captured, pDoc Signer places the new signature object within the boundary of the current document page. The modifiable signature object will remain tinted with a blue transparent color until it is embedded in the PDF document. Once embedded, the signature will appear fully transparent.
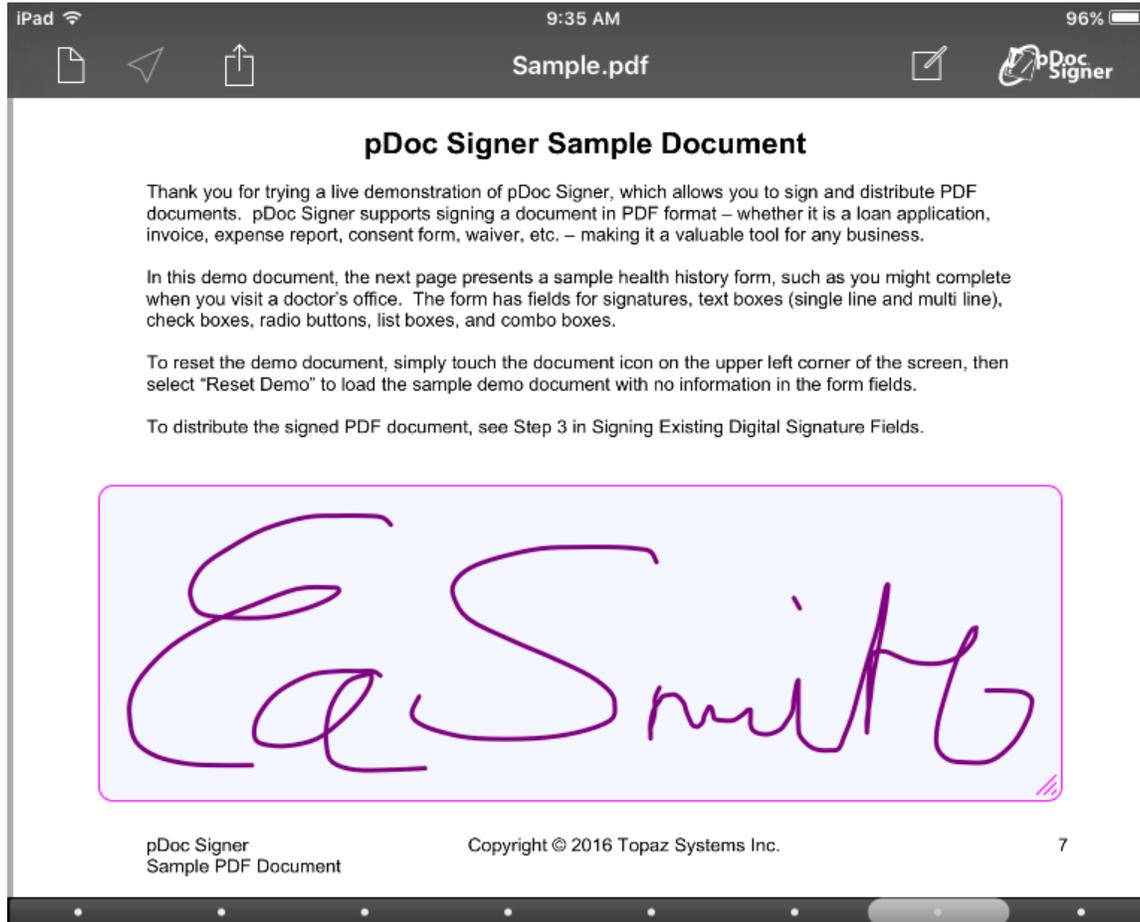
5.1 – Editing and Deleting the Signature

Every signature object contains the raw signature capture data as well as extra metadata that will be included in the embedded Adobe digital signature field. The following signature information is included:

- Name and e-mail
    - This information is editable in each signature and defaults can be defined in the app (See Settings section).

- Current location
    - This is the GPS location at the time of signature capture (see Location section).

- Date and Time stamp
    - This is the local date/time of the signature capture.

- Device ID of the capturing signature
    - This is a unique identifier that defines the device that captured the signature.

Some of the information such as name and e-mail can be edited by accessing the signature details window. To edit the signature, touch and hold the signature until the signature menu appears and select "Edit".
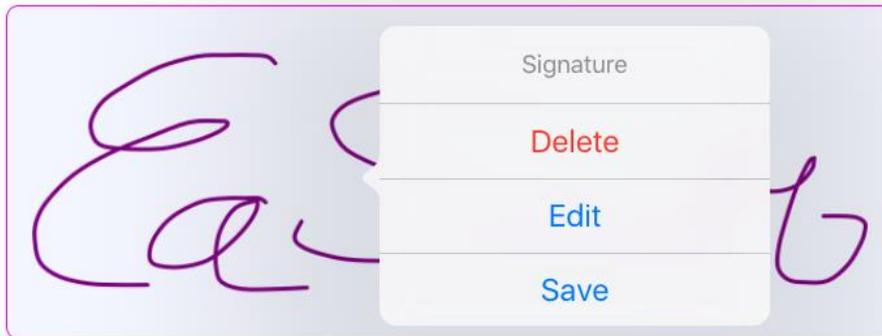
Note: *The same signature menu can be used to delete a signature object.*

5.1.1 – Signature Information

The Signature information (details) window reveals the additional information associated with the signature object. Each signature has a unique identifier indicated in the window title and includes both editable and fixed signature information.

5.2 – Resizing the Signature

pDoc Signer supports two methods for resizing a signature object. In both methods, the aspect ratio of the captured signature is maintained to ensure a true representation of a signer's signature. Signatures can be resized proportionally or anamorphically. The difference between the two methods is the size of the bounding area around the signature.

5.2.1 – Resizing Proportionally

To proportionally resize the signature itself and not the frame area around the signature, use the standard Apple finger pinch/zoom gesture. This method resizes the signature and the frame proportionally to maintain the original signature and frame aspect ratio.
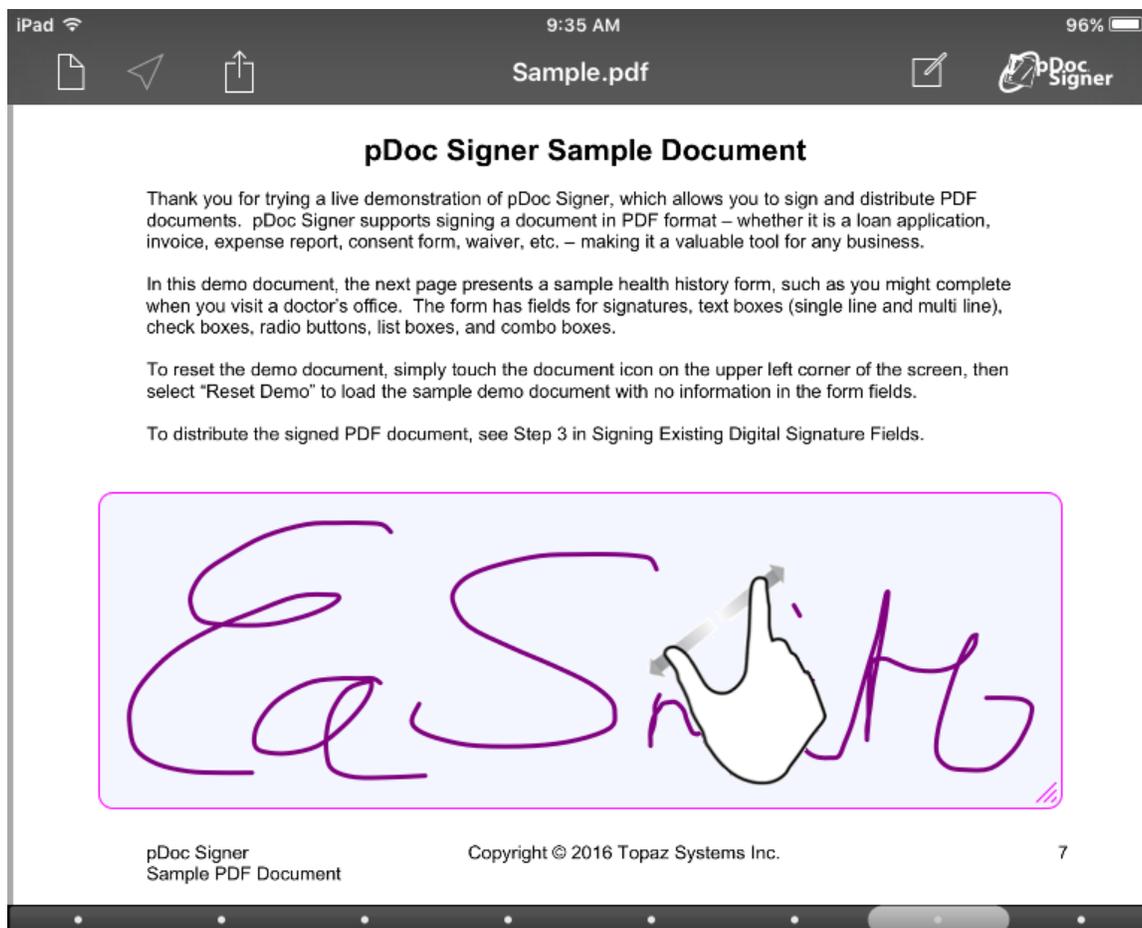
5.2.2 – Resizing Anamorphically

To anamorphically resize the signature frame, touch the resize grip icon in the bottom right corner of the signature frame and move it to resize the frame. This resizing method allows you to freely resize the signature frame without maintaining its original aspect ratio. The signature itself is resized to fit within the resized frame; however, its aspect ratio is always maintained.
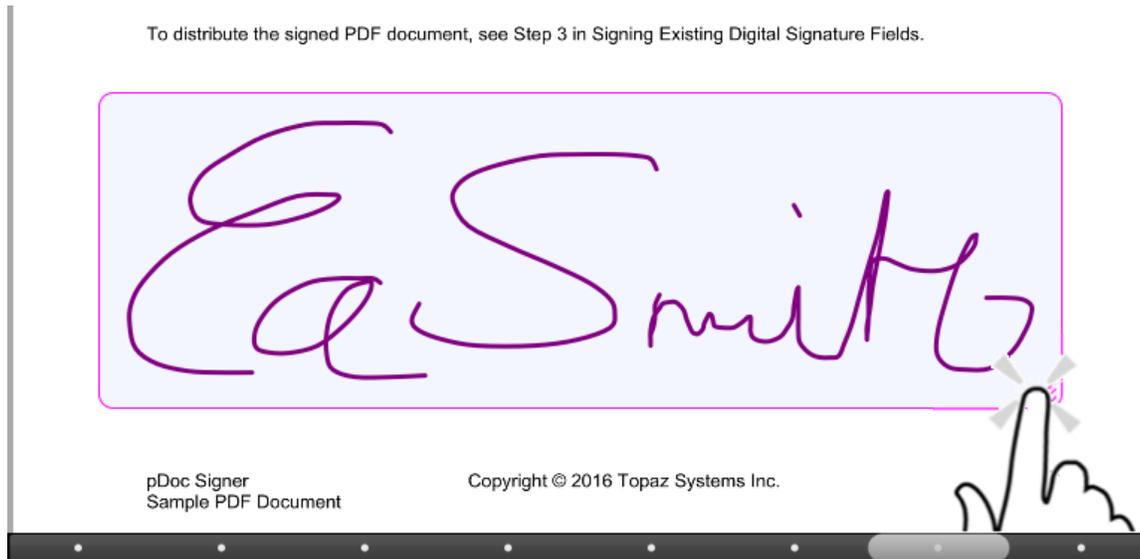
5.3 – Moving the Signature

To move a signature object within the page, use the standard Apple finger panning gesture. Simply touch the signature and move your finger around the page freely. The signature object will follow the movement of your finger continuously. To place the signature in the desired location within the page, simply release it by lifting your finger from the screen.

Notes:
1. Signatures placed in zoomed-in PDF pages will compete for touch (pan/pinch zoom) gestures with the PDF page itself.
2. To "select" the signature (instead of the page itself) for interaction, simply touch and very briefly hold the signature field (less than a second or else the signature menu will appear) before panning or pinch zooming.
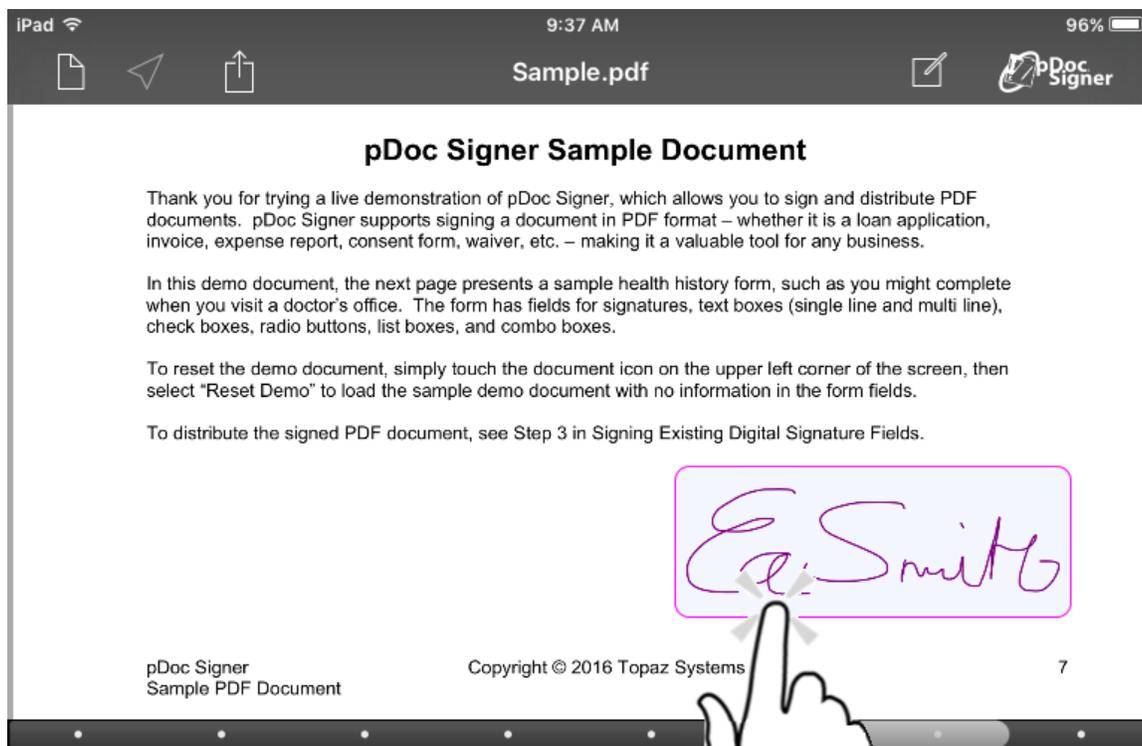
5.4 – Locking the Signature

A signature object is placed on the document page in unlocked mode to allow precise placement and resizing. Once the signature is in the desired location and size, it can be locked into place by simply tapping on the signature. This removes the bounded frame and toggles the lock/unlocked state to locked. In the locked state, the signature cannot be moved or resized. To unlock the signature again, simply tap to return the re-sizing frame.
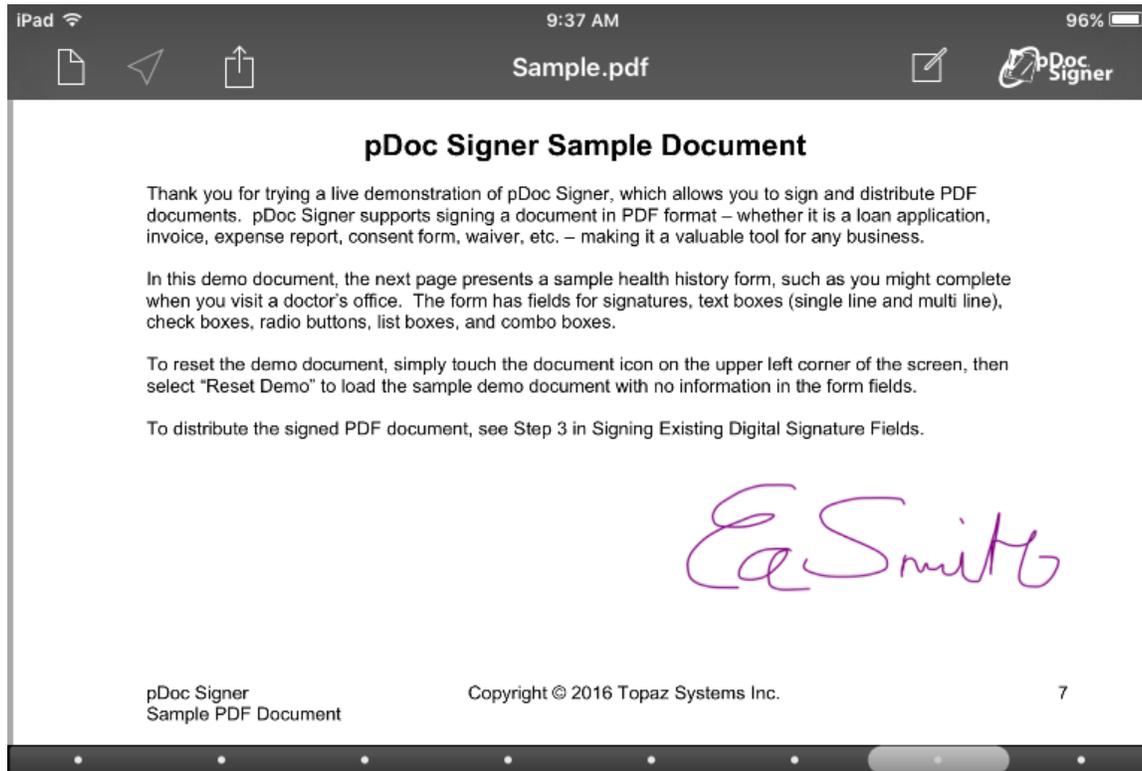

Notes:
1. *Locking a signature may result in a warning being displayed about overlapping signatures. Although signatures can be overlapped due to their transparent appearance, it is recommended that they are positioned to avoid overlapping.*
2. *Scrolling back or forward to another page in the document will automatically lock signature objects on the current page.*
3. *Tapping on a document page instead of a signature will toggle the toolbar.*
4. *The signature in the above screen capture illustrates a finalized embedded document signature that is fully transparent without a blue tint indicating it is no longer modifiable.*

5.5 – Creating Empty Signature Fields

pDoc Signer also supports the creation of new signature fields to remain empty for future use. To create an empty signature object, touch the "Sign" button to open the signature capture window and then the "Done" button without signing. This action will prompt you to create an empty signature object.
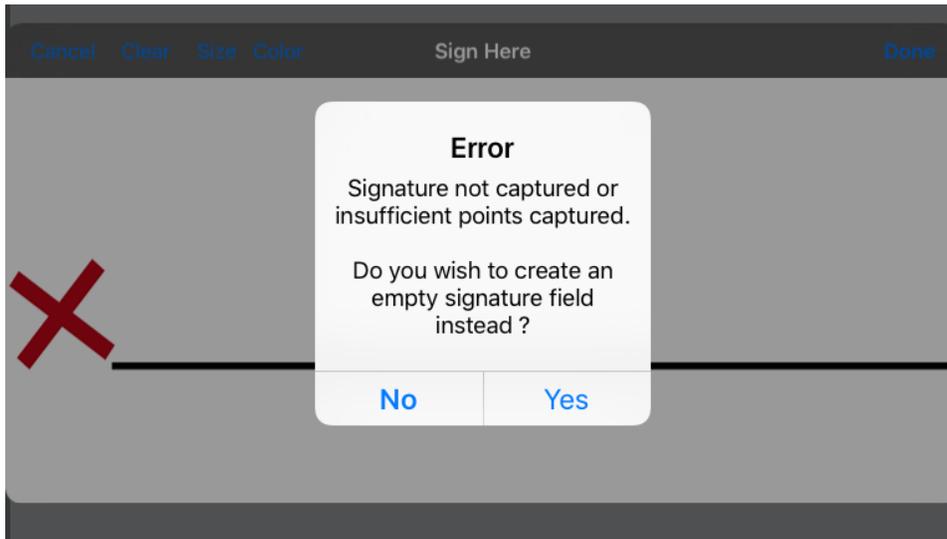
Choosing "Yes" will create an empty signature object. As illustrated in the screenshot below, a new empty signature object will appear with an icon showing a hand holding a pen. Newly created empty signature objects can be resized, reshaped, or deleted. To sign an empty signature object, it must first be converted into a PDF signature field and embedded in the document.
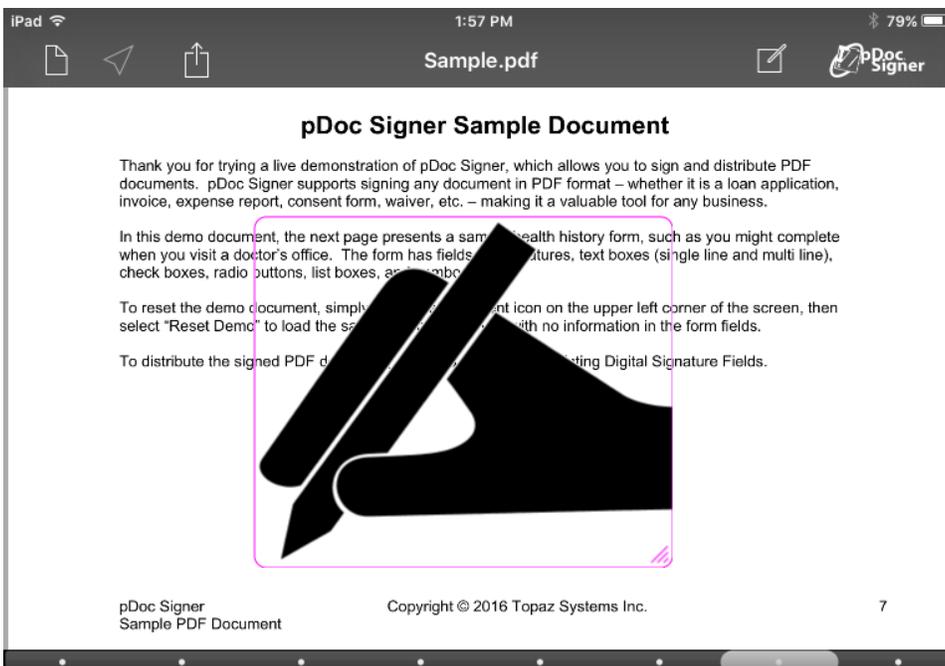
6 – Signature Location Information

pDoc Signer supports Apple Location services to add the current GPS location into the signature object details. In order for location information to be included, the service must be enabled for the pDoc Signer app in the iPad settings. pDoc Signer automatically reads location information for inclusion in signature objects. This information can be checked anytime and prior to signing a document. The pDoc Signer tool bar contains a Location icon that can be either disabled or enabled.

6.1 – Checking Location Information

If enabled, this means that pDoc Signer has acquired GPS location information and will be included in all signatures. If the icon is disabled, no information is available. This condition can be due to disabled Location services in general on the iPad or for the pDoc Signer app specifically. A disabled icon can also mean that accurate location information has not been acquired yet.

To check the current location, simply touch the icon to open the location in Google Maps or Apple Maps. Signature location can also be checked by touching on the GPS coordinates in a signature object's details.

7 – Fillable Forms

pDoc Signer supports PDF form fillable fields allowing for documents to be filled and signed in one signing session. As with signature objects, form data objects can be modified using pDoc Signer and then these changes made permanent and embedded into the PDF document along with signature objects.

The following form fields are supported:

- Single line and Multiline text fields
- Check boxes
- Radio boxes

- List boxes (single or multiselect)
- Combo boxes (both editable and non-editable)

7.1 – Text Fields

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 multiline text fields.

Here is a single line text field example:

What's your favorite color?   THIS IS A SINGLE LINE TEXT FIELD

Here is a multiline text field:

Describe the effect of the Hundred Years War: THIS IS A MULTILINE TEXT FIELD

pDoc Signer also 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.

HELLO I AM A CLONED FIELD

HELLO I AM A CLONED FIELD

7.2 – Check Boxes

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 touching a box.

Here is a field of check boxes:

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 Dept.   ☐ Sales Dept.   ☐ Operations Dept.   ☑ Dept. of Redundancy
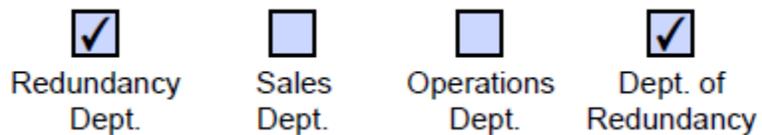
7.3 – Radio Buttons

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. In some cases, radio buttons may represent identical options and selecting one will automativally select another in unison.

Here is an example:

In what time zone do you live?

○ Eastern   ○ Central   ○ Mountain   ⦿ Pacific   ○ Other

7.4 – List Boxes

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?

AR
CA
CO
CT
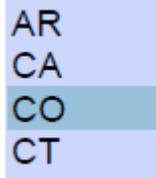
What level of education have you completed?

High School
Bachelors
Masters
Doctorate

High School	
Bachelors	
Masters	✓
Doctorate	
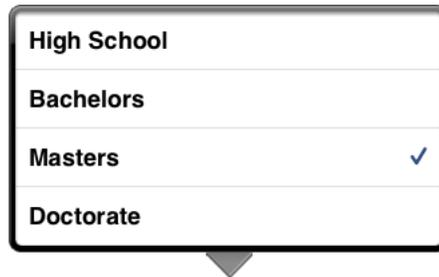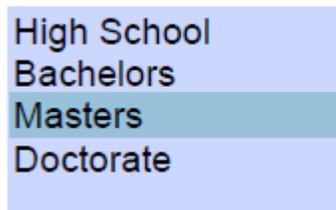
7.5 – Combo Boxes

A combo box is a single line text field that expands to a list box (showing a list of selectable values) by touching 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 may be editable to enter data other than the predefined choices.

Here are some examples:

What type of loan do you want?

Auto ▼

Auto

Education

Home Improvement

Small Business

In what county do you live?

Other (Enter Your County) ▼

8 – Embedding Signature & Form Data into PDF Documents for Distribution

pDoc Signer signature objects must be converted to Adobe digital signature fields and embedded into the PDF document permanently before the document can be shared or distributed from pDoc Signer. At times, pDoc Signer may require signature objects to be embedded before further modifications to the document can be made. This is necessary to ensure the integrity and security of signed PDF documents. pDoc Signer will prompt a message indicating that the document needs to be saved when this condition occurs.

8.1 – Document Sharing and Distribution

Documents can be distributed from the pDoc Signer app either by e-mail as attachments or by sending the document to other apps installed on the iPad.

To send a document by e-mail touch the "Share" icon and select the "E-mail Document" option.

To send the document to another app touch the "Share" icon and then select the "Open Document In…" option.

Note: Only apps supporting the PDF document format will be listed in the apps to choose from, when selecting the "Open Document In" option. Only a limited number of app entries are supported by Apple. If your desired app is not listed, try removing other PDF supported apps.
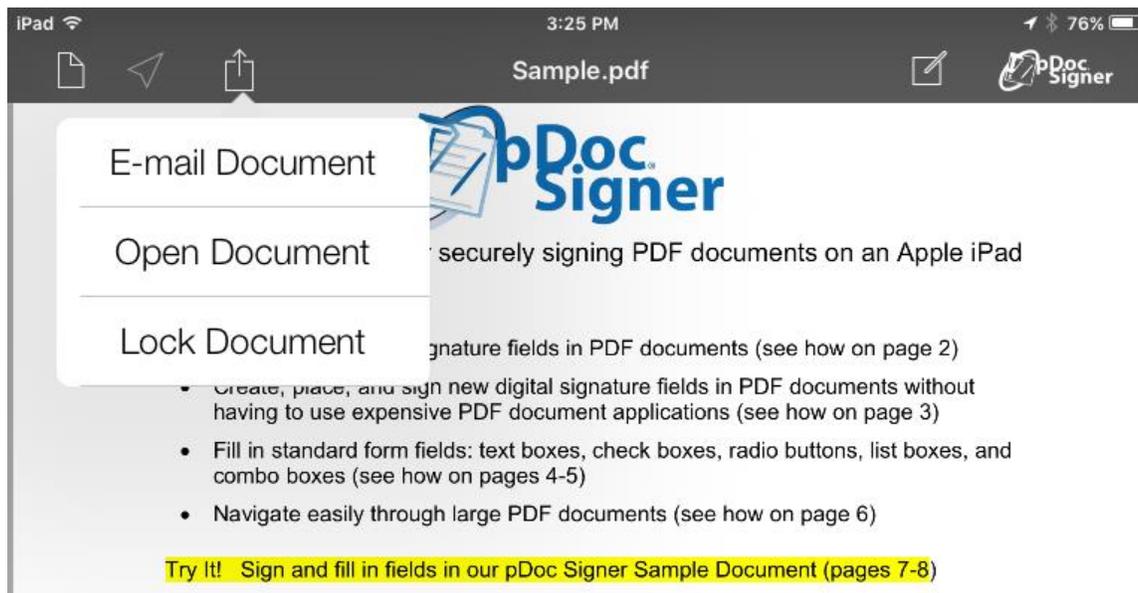
8.2 – Signature Embedding

If newly signed signature fields, newly created signature objects, or newly filled fields are detected when the document is to be e-mailed or shared with another app, pDoc Signer automatically embeds them into the document prior to executing the share request. The shared document contains only Adobe digital signature fields in place of the pDoc Signer signature objects, securely containing all the signature details. If pDoc Signer does not detect any new signatures, any new signature objects, or any new data in form fields, it immediately processes the document for e-mailing or sharing with another app.

Note: Signed PDF documents maintain versioning within the document itself. You can use Adobe Reader to view the version of the document in-between signatures.

8.3 – Form Data Embedding

If original PDF document form data is changed or new data is added, pDoc Signer will detect the changes and, as with applied signatures and embed the changes before you can share the document by e-mail or send it to another app. If form data is changed and one or more signature fields are signed at the same time, pDoc Signer will embed data and signatures are required to maintain the document integrity and properly reflect the sequence of document change events.

8.4 – Document Locking and Deleting

Since signature objects must be converted into permanent signature fields before they can be distributed, it may be necessary to lock the document to not allow any more changes to the document until current changes are embedded. Locking the document ensures that signature objects and form data cannot be modified or new signatures added. To lock a document with modifications but without final embedding or sharing, access the Share menu from the Share icon in the toolbar and select "Lock Document"
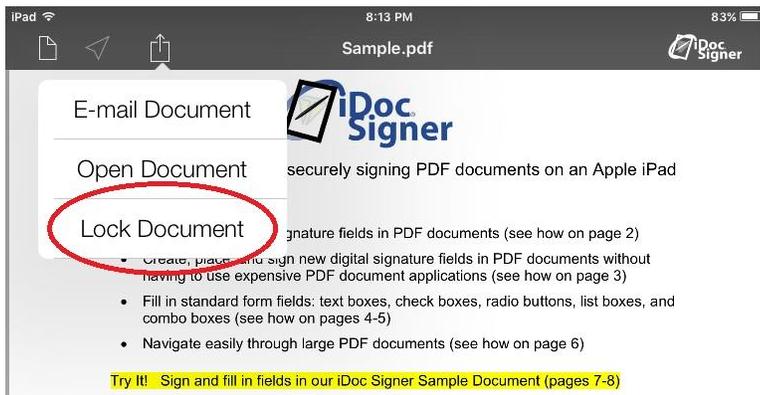
Once locked, the document remains protected until distributed. A locked document is indicated by a red toolbar.
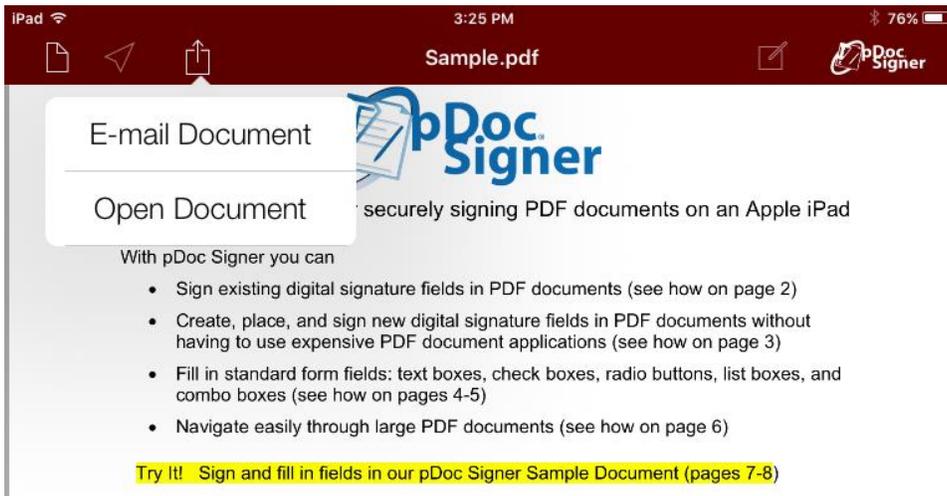

A document can be deleted anytime even if it is locked. To delete a document, open the Documents menu and swipe across the name of the document to reveal a deletion button.
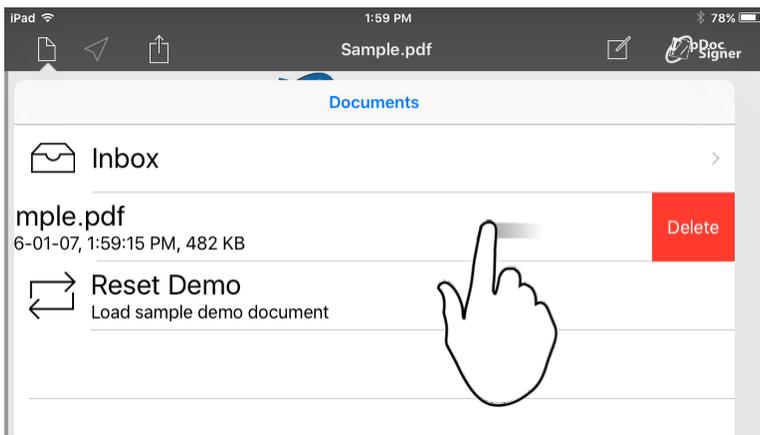
Note: Currently loaded documents cannot be deleted from the document menu.

9 – pDoc Signer Settings

The pDoc Signer settings window can be accessed by touching the app logo in the toolbar. In the Settings window, default signature information and other application options can be adjusted.
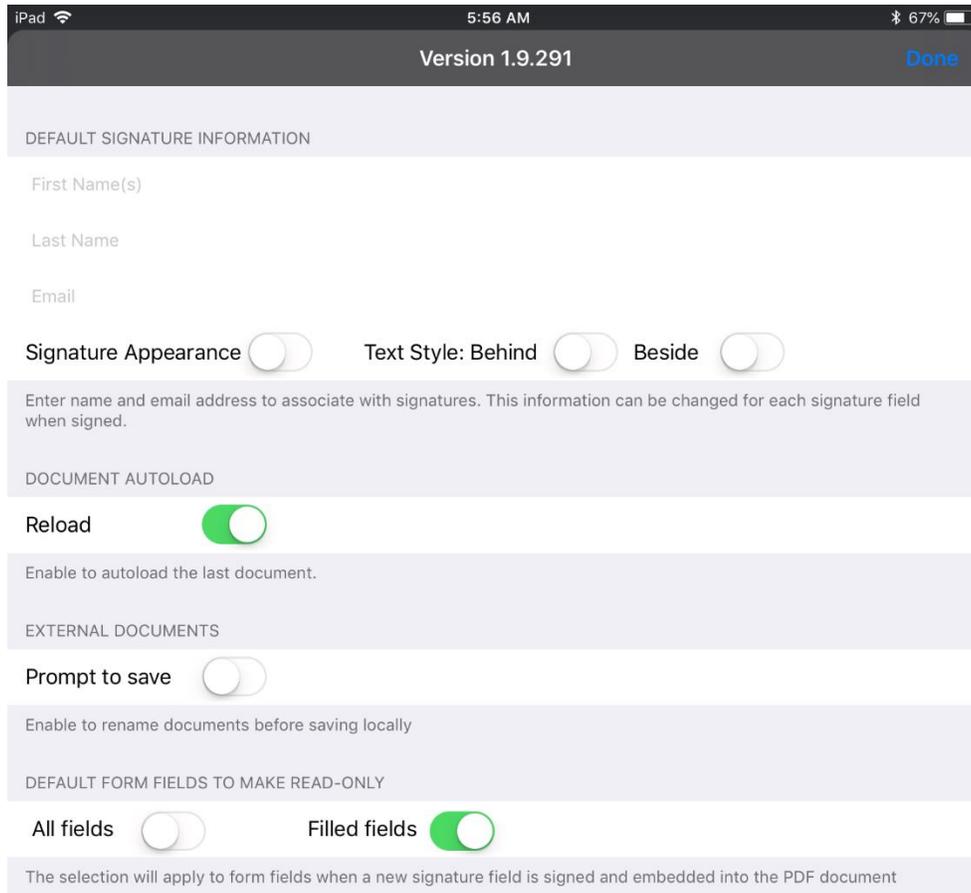

9.1 – Default Signature Details

In the Settings window, a default name and e-mail can be entered for inclusion in every signature created in pDoc Signer.

Note: *Default signature information can be edited and changed in individual signature objects after signing.*

9.2 – Signature Appearance

The signer details text can be added to the signature image by enabling the signature appearance option. If no signer details are provided, the date and time will be included with the signature image. There are two text details layout styles supported. In "Behind" mode, the text is overlaid on the signature image and left bottom justified. In "Beside" mode, the details text is top left justified but at the half field length point to separate the signature image from the text. If neither style mode is selected, the best appearance style will be automatically used based on the size and shape of the signature field.
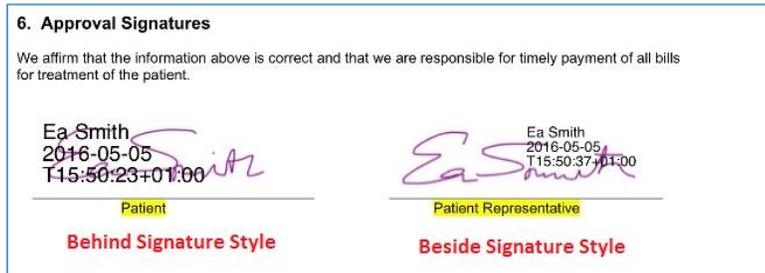
9.3- Document Loading

By default, pDoc Signer automatically reloads the last document opened when the app launches. In certain situations, this may not be desired. To not automatically load a document when the app launches, turn off the "Reload" option

9.4 – Document Saving

pDoc Signer preserves original documents it receives in the "**Inbox**" document folder and creates copies of documents that are signed or form filled. The initial saving of the original document is automatically version renamed with a '-1', '-2' etc suffix to avoid overwriting any existing documents with the same name. To manually rename original documents when initially saving, enable the "**Prompt to save**" option in the pDoc Signer settings.

Note: Subsequent document modifications of saved documents are overwritten to maintain a single copy of the document.

By default, and unlike Inbox documents, cloud storage documents are saved back in their original cloud location, overwriting the original document. This allows online storage folders to become sources of documents to be signed and replaced automatically. To preserve cloud documents and save copies of the documents locally, enable the "**Prompt to save**" option in the pDoc Signer app's settings. In addition to renaming documents before saving, this setting will also treat cloud documents like Inbox documents as described above.

Note: Any PDF document loaded in pDoc Signer can also be manually saved in a cloud storage location using the pDoc Signer's Share feature (see Section 8.1) and selecting the corresponding cloud service or cloud service app.

9.5 – Form Field Read-Only Rules

When a signature field created in pDoc Signer is signed, it will make filled form fields read-only by default. Optionally, you can select a read-only rule to apply with each signature. Turning on the "All fields" option will make all form fillable fields read-only when the document is signed. The option "Filled fields" (default) will only make read-only fields with content at the time of signing. These rules are applicable only for new signature fields added to the document by the pDoc Signer application. These settings will not affect preexisting signature fields. The default or adjusted form field read-only rule is copied into each signature field. However, each signature object's read-only rule can be modified by editing the signature object properties. As such, different rules can be applied to the document's form fields by different signature fields.

10 – Automatic Signing Certificate Update

pDoc Signer utilizes a signing certificate issued by a trusted Certificate Authority to securely encrypt each signature into your PDF documents. This enables PDF viewer software systems, like Adobe Reader, to validate signatures and determine if a document has been altered after the signature was applied. Signing certificates are like licenses in that they are issued for a certain period, typically one to three years.

pDoc Signer periodically checks the expiration date of the certificate being used for signature encryption. If the expiration date of the signing certificate is imminent or has passed, pDoc Signer will notify you by displaying a message and then will attempt to connect to the Internet and automatically download a new signing certificate from the Topaz site. If the signing certificate has expired, pDoc Signer will not allow you to proceed with the signing process until the expired certificate is replaced.