



signotec  
e-signature solutions

**SOFTWARE  
SOLUTIONS**

signoSign/2

## Documentation signoSign/2

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## 1 List of revisions

Version	Date	Person responsible	Note
1.0	05 Apr. 2012	Ferenc Hilker	Documentation created
1.1	23 Apr. 2012	Ferenc Hilker	Additions made: form mode, scan function, line width and archiving name
1.2	08 May 2012	Ferenc Hilker	Additions made: archiving subfolder, notes, placeholder definitions and SML files
1.3	22 Jun. 2012	Ferenc Hilker	Additions made: webcam function, extraction mode, application behaviour and transfer application
1.4	27 Aug. 2012	Ferenc Hilker	Additions made: parameters and iPhone capture plug-in
1.5	06 Sep. 2012	Ferenc Hilker	Additions made: import and export of single document types, sending an e-mail without an attachment and IP list capture plug-in
1.6	20 Dec. 2012	Ferenc Hilker	Additions made: saving the signatures as a graphic and adding a PDF document
1.7	22 Mar. 2012	Ferenc Hilker	Additions made: archive query, fetching the documentation and new pad configuration
1.8	02 Aug. 2013	Ferenc Hilker	Additions made: PDF/A compliance, signing on the pad, print settings per document type, saving of biometric data, application parameters, switching the pad during signature capture, setting up an ad hoc network, adjusting the pad configuration and information on plug-ins
1.9	31 Jul. 2014	Ferenc Hilker	Additions made: certified timestamp, signotec content signing, actions after opening or closing the document, signature approval per signature field, version status for content signing, file names as well as external programs and their parameters for signature images and biometric data, deleting placeholders and signing in Alpha mode

1.10	30 Sep. 2014	Ferenc Hilker	Additions made: control of the signature process via keyboard
1.11	28 May 2015	Ferenc Hilker	Additions made: log file name, brightness and contrast of scans, signoStorage, add picture after opening, own print settings, signature additions settings, overwrite source file and manually add a picture
1.12	09 Feb. 2016	Ferenc Hilker	Configuration of the Gamma pad added
1.13	08 Jul. 2016	Ferenc Hilker	Additions made: archive service and custom pad display
1.14	05 Oct. 2016	Ferenc Hilker	Additions made: support of TWAIN scanners and certificate exchange
1.15	12 Jan. 2017	Ferenc Hilker	Additions made: configuration of the Delta pad, interactive signing mode, index file name, placeholder from form fields, signature field groups, actions after opening the document and e-mail settings
2.0	16 Nov. 2017	Ferenc Hilker	Full revision
3.0	18 May. 2020	Ferenc Hilker	Full revision
3.1	27 July 2020	Ferenc Hilker	Additions made: new placeholders and check of the XML coding
3.2	25 August 2020	Ferenc Hilker	Additions made: handwritten notes, new placeholders, the signature pad signotec Zeta and adaptation of the 'capture signature manually' mode
3.3	15 October 2020	Ferenc Hilker	Revision of maintenance and signature field groups
3.4.	10 December 2020	Ferenc Hilker	Additions made: printing by Adobe, parameter OpenResubmission, e-mail dispatch for resubmission and more available placeholders
3.5	22 February 2021	Ferenc Hilker	Revision of the e-mail settings

## 2 Configuration

signoSign/2 provides a variety of configuration options so that you can customise it to your requirements.

You can open the configuration window by selecting the menu item **Tools > Configuration...**. Alternatively, you can open the configuration window using the **F8** key or the Quick Start bar icon.



## 2.1 General settings

### 2.1.1 General settings

With the **Start minimized, if no document is opened.** check box, you can specify that signoSign/2 should start minimised if you open it without a document. This is useful if, for example, signoSign/2 was put into autostart but you do not want it to gain focus when the computer is started. This option is disabled by default.

With the **Minimize to System Tray** setting, you can define whether signoSign/2 should be minimised to the system tray or, alternatively, to the taskbar. This option is disabled by default, so the software is minimised to the taskbar.

The general settings allow you to define how signoSign/2 should behave once the last open document is closed. You can choose between **Do nothing** (signoSign/2 remains open), **Minimise the application** (signoSign/2 will be minimised and can be reactivated using the icon in the taskbar or the system tray) or **Close the application** (signoSign/2 will be closed). The option 'Minimise the application' is selected by default.

You can also use the setting **Show info box at startup** to specify whether a window containing important information should be displayed when signoSign/2 starts up. In the window itself, you can deactivate this setting by clicking the button **Do not show again**. This option is enabled by default.

### 2.1.2 Accessing the configuration dialog boxes requires login

By enabling this option, the configuration dialog boxes and document type administration are protected from unauthorised access through a user name and password.

Use **User name** to specify your chosen user name, and **Password** and **Repeat password** to define your chosen password. This option is disabled by default.

Before you can configure signoSign/2, you must enter your user name and password in a window. The configuration dialog box or document type administration opens only after successful authentication.

Alternatively, **Use different login for document type administration** allows you to save separate login data. To do this, activate the option and then enter **User name**, **Password** and **Repeat password** here as well. This option is disabled by default.

The configuration and the document type administration now have their own login data and can only be accessed via the corresponding dialog.

If you have forgotten your user name or password, please contact our support by filling out our [online form](#).

### 2.1.3 Language

To select the required language, use the selection list displayed. The selected language is only enabled after restarting signoSign/2. If **Automatic** is selected, signoSign/2 will use the language set in the operating system or – if this language is not available in signoSign/2 – English. The option 'Automatic' is selected by default.

### 2.1.4 Logging

For the type of logging, you can select **Log nothing**, **Only errors and warnings**, **Log everything** and **Debug mode** from the drop-down list. This logging helps you and us to understand which actions the application has performed. The option 'Only errors and warnings' is selected by default.



If you select **Log nothing**, no log file is created.

If you select **Only errors and warnings**, only problems that occur when using signoSign/2 are documented.

If you select **Log everything**, every event, such as the archiving of individual documents or the insertion of signatures, is logged.

The **Debug mode** should be selected only if Support advises you to do so. This mode is intended for error analysis and causes highly detailed log files to be generated, which may have a negative impact on system performance.

Normally one log file is created per day, in which the corresponding processes are recorded with a precise timestamp. You can select any directory as the **Directory for log files**. To do this, click the button with the three dots. The default directory is **%USERPROFILE%\Documents**.

The **Include the machine name in the log files name** and/or **Include the user name in the log files name** check boxes allow you to add the respective information to the file name. The structure of the log file name is: **signoSign2\_machinename\_username\_date.log**. These settings are disabled by default.

A few examples of log file names are given below:

*signoSign2\_20181112.log*

*signoSign2\_FerencHilker\_20181112.log*

*signoSign2\_FERENCHILKER-PC\_20181112.log*

*signoSign2\_FERENCHILKER-PC\_FerencHilker\_20181112.log*

### 2.1.5 Folders of configuration files

If the optional **Alternative configuration folder** is activated, a folder can be defined for the configuration file **signoSign2\_Configuration.xml**. You can select this folder by clicking the button with the three dots or you can enter it into the input field and edit it manually. When you confirm and close the configuration dialog, a copy of the configuration file is saved to the defined folder. From now on, this configuration file will be displayed in the configuration of all settings and all configuration settings that are made will be saved in this copy. If the defined folder does not contain a configuration file when signoSign/2 is started, a copy of the configuration file from **%PROGRAMDATA%\signotec\signoSign2** will be saved there. The configuration file and its settings from **%PROGRAMDATA%\signotec\signoSign2** will also be used if the defined folder is not present or cannot be accessed. This option is disabled by default.

Under **Directory for document types**, you can change the storage location of the **signoSign2\_DocTypes.xml** and **signoSign2\_DocTypeTemplates.zip** configuration files. The default directory is **%CommonApplicationData%\signotec\signoSign2**.

The **signoSign2\_DocTypeTemplates.zip** file contains all document type template files that were configured in document type administration. This ZIP file is needed on the workstation only if changes to the document type settings are made or new document types are created. This file is not required on workstations that just use the document types but do not process them.

You can click the button with the three dots to select any directory you like.

The effect of the **Remind to check document types for uniqueness** setting is that clicking on OK or Apply in the document type administration will cause an info box to be displayed if no check has been made that the document type identification is unique. You can select **Yes** to confirm to save the changes that have been made and close the window or select **No** to reject and remain in the document type administration view. This option is disabled by default.



## 2.1.6 Maintenance

Use the options provided here to export your configurations and later reimport them.

Click **Export configuration** to export configuration files from the folder **C:\ProgramData\signotec\signoSign2**. You must specify a storage location in which signoSign/2 should store the files. The following must be observed: If an alternative configuration folder is defined for the configuration, this file is also exported and called **signoSign2\_Configuration\_EXTERN.xml**. If a non-default directory is defined for the directory for document types, the **signoSign2\_DocTypes.xml**, **signoSign2\_DocTypes\_Locked.xml** and the **signoSign2\_DocTypeTemplates.zip** are exported from there and not those from **C:\ProgramData\signotec\signoSign2**. If a non-standard directory is defined for the biometric certificate, the biometric certificate is exported from there and not the one from **C:\ProgramData\signotec\signoSign2**.

To import existing configuration files using **Import configuration**, you must select the folder containing the files. signoSign/2 then imports configuration files from this directory to **C:\ProgramData\signotec\signoSign2** and the existing settings are overwritten. The following must be observed: If an alternative configuration folder is defined for the configuration, the **signoSign2\_Configuration\_EXTERN.xml** must be manually renamed to **signoSign2\_Configuration.xml** and stored in the corresponding configured directory. If for the directory for the document types a directory different from the standard one is defined, the **signoSign2\_DocTypes.xml**, **signoSign2\_DocTypes\_Locked.xml** and the **signoSign2\_DocTypeTemplates.zip** were imported but must be stored manually in the corresponding configured directory. The biometric certificate will not be imported and must be placed into the configured directory manually.

## 2.2 Print settings

### 2.2.1 General print settings

First you can define how the document is to be printed by **Print mode**. You can choose between **Default** and **Acrobat Reader**.

If you select **Default**, the document is printed by signoSign/2.

If you select **Acrobat Reader**, the document will be printed by Adobe Acrobat Reader. This requires the Adobe Acrobat Reader to be installed. The [setting Adjusting page size](#) and the [setting Print custom text starting with the 2nd copy](#) are deactivated by this. We recommend using this option if problems occur by printing using the Default mode.

You can adjust the page size using the general printer settings. In the drop-down list, you can choose between **No adjustment**, **Fit to print area** and **Reduce to print area**.

If you select **No adjustment**, the document remains unchanged.

If you select **Fit to print area**, the document is reduced or increased in size so that it fits into the configured print area, thus making the best use of the print area.

If you select **Reduce to print area**, a document that is too large for the print area is reduced so that it fits into the configured print area. Documents that do fit into the print area are not scaled.

### 2.2.2 Printer preselection

You can preconfigure up to four different printers using the printer preselection.

Use the drop-down list to select which of the available printers you would like to use. In the **User-defined text** boxes, you can also enter a text to identify the printer.

If you have configured a printer, you can select the **Display in quick access toolbar** check box to display the printer in the toolbar. The printer is identified by the corresponding number; subsequently, you can print an open document simply by clicking the icon, without the need for another dialog box or any additional actions.



## 2.3 E-mail settings

### 2.3.1 General settings

You can configure a mail client to send the document by e-mail. You can use **Outlook** or **SMTP** as the mail client. Alternatively, you can deactivate the sending of e-mails in general by **Deactivate e-mail transmission**.

If you select **Outlook**, the e-mail program Outlook installed on the system and the associated user account are used for sending e-mail. Other e-mail programs are not supported.

### 2.3.2 SMTP settings

To use an SMTP client, you must configure the following settings.

First, configure the associated **Server** and **Port**.

You can optionally encrypt the data transmission on the Internet by encryption protocol with activating **Encrypted connection required (TLS)**. You can use SSL/TLS as well as STARTTLS if the SMTP server supports it.

In the **Sender (e-mail)** field, enter the e-mail address of the e-mail account to be used. The **Name (optional)** field can be used if a name is to be displayed at the recipient in addition to the sender e-mail address.

If the e-mail server requires a login, the **Server requires authentication** check box must be selected.

Finally, enter the **User name** and **Password** for the e-mail account to be used, if a login is necessary.



*If you use a Gmail account for sending e-mail, for example, you may need to activate the option for allowing access to less secure apps in the account's security settings.*

## 2.4 Signature settings

### 2.4.1 General signature settings

In the general signature settings, first specify how the **Orientation of signatures** within the signature field. Select **Centred**, **Left-aligned** or **Right-aligned** to display the signature as centred, left-aligned or right-aligned in the signature field. The option 'Left-aligned' is selected by default.

In the **Color of signatures** field, select the colour in which the signature will appear in your document. You can choose from the following colours. The option 'Blue' is selected by default.

You can also define the **Line width of the signatures**. The signature is then placed in the document with a thinner or thicker line, depending on the configuration. This setting does not affect how the signature is displayed in the signature pad. Please note that a line width that is too thin or too thick can lead to a situation where the legibility of the signature becomes a problem. The option 'Normal' is selected by default.

You can also turn off the **Pressure-dependent rendering of the signatures**. This way, the line thickness no longer varies according to the pressure used when creating the signature. This setting also has no effect on the display in the signature pad itself and only affects the display in the signature dialog and the signature inserted in the document. This option is enabled by default.

The **PDF/A Compliance** setting allows you to specify whether PDF documents in this format are recognised and thus handled according to the relevant specifications. **PDF/A-**

**1b** and **PDF/A-2b** allow you to enforce compliance for the respective format, so that the changes will be inserted according to the specifications regardless of whether the document is a PDF/A document or not. **Off** means that the PDF/A format is not retained and the specifications are not taken into account. If **Automatic** is selected, signoSign/2 recognises whether the document to be signed is a PDF/A-1b or PDF/A-2b document and automatically inserts the changes according to the specifications. The option 'Automatic' is selected by default.

Furthermore, you can force **Use of algorithm SHA256**, if a document has not yet been signed. The document will be converted to PDF version 1.6, as SHA256 can only be used from this version. Older PDF versions use the SHA1 algorithm. If a conversion is not possible (for example, because the document already contains signatures), the SHA1 algorithm will be used. This option is enabled by default.

The last setting, **Capture biometric data and save them into the document**, can be used to specify whether biometric data (X-coordinate, Y-coordinate, time and pressure) should be captured during signing and saved in the document in encrypted form. This storage is done in order to later prove who the document was signed by. In line with the GDPR, a confirmation text will be displayed to the person signing before every signature. If you would prefer this data not to be stored, you can disable this setting. This option is enabled by default.

All these settings apply to all signature fields.

## 2.4.2 Configuration for time servers

In the **Origin of time of signature** field, select the source from which the timestamp for each signature is obtained. If you select **Local system**, the bottom drop-down list is locked, and the local system time is used. Otherwise, you can select either **SNTP server** or **SNTP server, if available**. If you select '**SNTP server, if available**', the server time is used if it is available. If it is not available, the local system time is used. You can either choose an SNTP server from the list or enter/define your own. The option 'Local system' is selected by default.

Alternatively, you can select **Certified timestamp (RFC 3161)**, in which case you need to enter further details.

The advantage of a certified timestamp is that its authenticity is confirmed by a trusted authority. In addition, the timestamp is linked with the signature data and is only valid with this data. Therefore, a third-party authority confirms that precisely this signature was provided at precisely this time.

In the **URL of timestamp server** field, please enter the link for the time server. If the timestamp server requires **authentication**, activate this and enter the corresponding login data under **User name** and **Password** to enable a certified timestamp to be requested during a signing process.

## 2.4.3 Settings for the signing process

Select the first option **Fit document to page width during the signing process** to fit the document to the page width in the signoSign/2 window and display it in the window during the signing process. This option is enabled by default.

**Mode for confirmation of signatures** is used to decide when the signature is accepted and inserted in the document. With **Signature device or dialog**, the signature can be confirmed on the pad or in the signature dialog on the PC. If **Signature device first, dialog second** is selected, the signature must first be confirmed on the pad before the **Input checked and accepted** button is enabled in the signature dialog. The pad is locked for further entries until the signature is confirmed on the PC in the signature dialog. This setting is ignored when using the signature pad signotec Sigma Lite because the device has no display. In this case, the signature must be confirmed in the signature dialog on the PC. If **Dialog only, signature device optional** is selected, the signature must be

confirmed in the signature dialog. You can confirm the signature on the pad, but this has no effect on signature insertion; it merely blocks the pad for further entries. The option 'Signature device or dialog' is enabled by default.

If the document contains mandatory signature fields, you can select **Do not allow mandatory fields to be skipped** to require these fields to be signed before moving to the next signature field. This option is disabled by default.

Use **Cancelling the signature process in the case of unsigned mandatory fields closes the document** to specify whether the document should be automatically closed if the signing process for a mandatory field is cancelled. Before closing, a prompt will be displayed that you will have to confirm. This option is disabled by default.

You can also use **Always display the signature dialog centered** to define whether the signature dialog should always be displayed in the centre of the screen, which is also where the main signoSign/2 window is displayed. If this setting is disabled, the signature dialog can be placed in any position and this position is saved, which will cause the dialog to be displayed in the same place for the next signature field. The position can also be placed on another monitor, independently from the main window. This option is disabled by default.

## 2.4.4 Certificate settings

You can manage the **Certificate for Adobe DigSig signatures** and the **Certificate for biometric data** in the certificate settings.

You can set which **Mode** and which certificate is to be used. **Always PC** means that the certificate saved under **Certificate file** is always used. If **Always signature device** is selected, the certificate from the signature pad is always used. If no certificate is stored in the signature pad or if the pad does not support the required RSA functionalities, an error message will be displayed during signing. Or you can select **Signature device if possible**. This means that the certificate saved on the signature pad is used. If no certificate is stored on there or if the signature pad does not support the required RSA functionalities, the local certificate file is used.

The **Include only the end certificate in the X.509 certificate chain information** setting has the following effect: from the complete certificate chain for the signature, only the end certificate used for signing will be inserted as information in the document. This option is disabled by default, so the entire certificate chain is included.

The **Exchange certificate of the signature device** option for the biometrics certificate allows you to specify that the certificate stored in the certificate file is to be loaded onto the signature pad. This is carried out on a general basis. With the **Only if no certificate is stored in the signature device** setting, you can ensure that the certificate will only be exchanged if there is none in the signature pad. Otherwise, the stored certificate is retained. Both options are enabled by default.



*To be able to use the certificates in the signature pad, a Sigma (from firmware 1.16), an Omega (from firmware 1.25), Sigma Lite, Alpha, Gamma, Delta or Zeta is required.*

### 2.4.4.1 Selecting an existing certificate

Use the button to select a certificate.



A window then opens where you can access an 'Open file...' dialog by clicking the same button; here you can select the certificate (.p12 or .pfx for the signature certificate or .cer, .cert or .crt for the biometric certificate). These are the file formats we recommend for the certificates to be used. After making the selecting, the certificate is displayed under **File** and the corresponding **Password** for the certificate must be entered. You can use the option **Save password** to specify whether the password will need to be entered for each

document before the signing process. The following information about the selected certificate is also displayed once the correct password has been entered: **Owner**, **Serial number**, **Hash value**, **Duration of validity** and **Key length**.

#### 2.4.4.2 Creating a new certificate

Instead of selecting an existing certificate, you can create a new, self-signed certificate by clicking on the corresponding button.



A window will then open where you can enter the data relevant to the certificate. The mandatory fields marked in red **Name**, **Company**, **Password** and **Repeat password** must be filled out. All other fields such as **E-mail address**, **Organisational unit**, **City**, **Federal State** and **Country** are optional and you can thus leave them blank. You can use the option **Save password** to specify whether the password will need to be entered for each document before the signing process. You can use the setting **Duration of validity** to define how long the certificate should remain valid. You can either choose a period between **1** and **10 Years** or enter a year under **Valid until end of**, which can correspond to more than 10 years of validity and will expire on 31.12.XXXX. With a **Key length** of up to **4096 bits**, we offer the highest degree of security and the latest security technology.

Click **OK** to confirm your entries and display a 'Save as...' dialog. Here you can save the created signature or biometrics certificate in a location of your choosing. The biometrics certificate is saved split up into a public and a private key. The selected path is then shown as a certificate file and this certificate is then used for all future signing processes.

#### 2.4.5 Settings for the interactive signing mode

With the interactive signing mode, you can read through the document on the signature pad using a signotec Delta. You can use the pen to scroll vertically through the document and also insert hand-written marks and notes in the document. This is not possible in the normal signing mode.

The following settings relate solely to the interactive signing mode when using the signotec Delta signature pad.

The **Line width of notes** setting allows you to specify how thick or thin the line width of inserted notes should be. This has no effect on the display of notes during their capture; it concerns only their display after confirmation and insertion in the document. The option 'Thin' is selected by default.

With the **Color of notes** setting, you can define the colour in which notes are displayed both during their capture and after confirmation and insertion in the document. You can choose from various colours. The option 'Blue' is selected by default.

**Line width of marks** determines how thick or thin the line width of inserted marks should be. The behaviour here is the same as for notes; the setting concerns the display of marks only in the document and not during capture. The option 'Normal' is selected by default.

The last setting **Color of marks** defines the colour of the captured mark. This function can be used as a text marker to highlight content. The option 'Yellow' is selected by default.

The note mode and the start mode can be started by clicking the corresponding button on the pad, as long as the document has not yet been signed.

#### 2.4.6 Use 'signotec Content Signing'

As an alternative to Adobe-compliant digital signatures (DigSig), you can use 'signotec Content Signing'. This makes it possible to use the RSA functionalities of the signature pad signotec Omega, Gamma or Delta. In this case, the pad is switched to a special mode during signature capture in which the current screen content of the display is signed. The possibility of external influences (manipulation) is ruled out. The hash of the document for signing is shown on the display during signature capture. This hash is additionally entered



into a preconfigured form field of the PDF document. In this way, the signer can ensure that he/she is signing the 'right' document. Alternatively, it is also possible to show a PDF document of a matching size (640 x 480 px for the Omega, 800 x 480 px for the Gamma or 1280 x 800 px for the Delta) fully on the display and sign it. For such documents, it is not necessary to generate and compare a document hash. Instead of the actual signature, the entire display of the signature pad is inserted in the document as an image on a new page. This option is disabled by default.

In the **Field for hash value of document** field, please enter the name of the form field in which the document hash is to be entered. Note that this form field must already be contained in the document. If a field with this name is not found, a check is first made to determine whether the document is of a matching size (if configured accordingly, see below). If this is not the case, DigSig is used for signature insertion. The example below illustrates the structure of the document hash:

*/anJdc WC q8LO k9 eX Oel54o fuK4sG 38 EJpv zu Lh yKuDg=*

The effect of the **Print the document when the hash value changes** setting is that the document is printed whenever a new document hash is generated and entered into the corresponding field. This is generally the case for the document's first signature field. For all other signature fields, it will depend on their configuration in the document type administration. The document is printed before the signature capture, so this function is useful for handing over a printed copy to the signer, for example. The hash printed on the copy can then be immediately compared with the display on the signature pad. This option is disabled by default.

If the **Display documents of matching size completely in the signature device (no document hash)** check box is enabled, documents with a size of 640 x 480 px, 800 x 480 px or 1280 x 800 px are shown fully on the signotec Omega, Gamma or Delta pad display and signed. If the function is disabled, these documents are handled in the same way as all other documents. This means that they are signed with DigSig if no form field with the appropriate name is found. This option is disabled by default.

Insofar as a document hash is used, you can configure the display on the signature pad. The basic structure, the document hash, the buttons and the line for the signature are preset. However, there are four areas for which customised texts can be entered. Placeholders can also be used for each area. The corresponding input fields, namely **Heading**, **Running text**, **Bottom left** and **Bottom right**, can be found under **Configure display**.

## 2.5 Signature device settings

### 2.5.1 General settings

You can set the **Location of the signature device configuration** here. Either select the **Configuration file of signoSign/2**, or create a **Separate file** or a **Separate file (user-specific)**. This setting may be necessary when using a terminal server system. The option 'Separate file' is selected by default.

Option	Storage location and file name
Configuration file of signoSign/2	%ProgramData%\signotec\signoSign2\signoSign2_Configuration.xml
Separate file (user-specific)	%AppData%\signotec\signoSign2\signoSign2_PadConfiguration.xml
Separate file	%ProgramData%\signotec\signoSign2\signoSign2_PadConfiguration.xml

Use the **Button design** to set the layout of the button for the signature pad. The three icons on the left (Cancel, Retry, OK) relate to the signotec Omega, Alpha, Gamma and Delta display, while the three icons on the right relate to the signotec Sigma and Zeta. You can choose between two different designs in two sizes. The last two designs (wide buttons) are generally not supported by the Delta signature pad in interactive mode or by the Alpha signature pad in general. If selected, the appropriate buttons in normal width will be displayed instead for these signature pads. By default, the third option is selected.



In the signature device settings, you can select whether to **Mirror the entire pad display in the dialog box for signature capture**. If you select this option, the pad display is also shown in the signature dialogue box on the monitor screen. Otherwise, only the signature that is provided will be mirrored. For the signotec Delta, you can also click buttons from the PC and scroll the document in the pad. This option is disabled by default.

Use the setting **Signature process timeout (in seconds)** to define whether the signature provided is automatically confirmed after X seconds. You can select values from **1** to **15**. The timer starts the first time you remove the pen from the display after signing. If you continue to sign after the timeout, the timer will be reset and will start again when you next remove the pen. This function can be used in both normal and interactive signing mode and applies exclusively to signotec signature pads. This option has no effect on reading mode or any configured confirmation text. This option is disabled by default.

## 2.5.2 Selecting signature devices

The field underneath contains a list of the Tablet PC and Pen Display and any installed Plug-Ins by default, permanently. All connected signature pads are only listed in accordance with the search criteria once the search has been completed successfully. **Signature device** and **Connection (USB, WinUSB, COM or IP)** are displayed to provide information on the signature pads.

To the right of the field listing the signature pads, you can search for signature pads. To do so, click the **Search devices** button. A search for USB devices only is performed by default. If the search is to include other devices, this can be defined using the **Configure search** button. This configuration is permanently stored.

Individual connection types for the search can then be enabled or disabled here so as to include or exclude them from the search. The search for serial devices and devices that are connected via a USB Ethernet Adapter takes more time and is therefore not activated for the search by default. All COM ports are searched in the case of serial devices. For IP devices, it is possible to enter two IP addresses and the port under which to search for the devices.

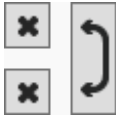
Click **OK** to apply your changes and then start a search with the new settings by clicking **Search devices**.

A device included in the list can be selected by clicking it. You can now **Identify signature device**, whereby a lamp is shown on the display of your signature pad. This is useful if several signature pads of the same type are connected and you want to find out which device is which. First of all, a signature device has to be defined as the primary device using **Assign first signature device**. There is an option to define another signature pad as the secondary signature pad using **Assign second signature device**. Alternatively, you can assign the first signature pad as first signature device by double-clicking it or, if the first device is already configured (assigned), assign it as second signature device. See the following chapters for details on how to switch between devices during a signature process and how to pre-select the signature device for signature fields.

If you assign a signature pad, you can enter a **Description** for the pad to make the assignment more descriptive. This name is purely for administrative purposes and does not affect the application or the function in any other way.



Depending on the selection, the defined devices appear on the list as the **First** or **Second signature device**. The assignment can be deleted using the button with the cross. If the first signature pad is deleted, the second signature pad automatically moves into the place of the first. If two signature pads are defined, you can swap their positions by clicking the button with the arrow.



The option **Use second signature device as fallback** defines whether a second configured signature device should be used as a backup if the first configured signature device is not available. If, for example, a Sigma is configured as first signature device (but not connected) and the Tablet PC and Pen Display mode as second signature device, the signature would be requested on the Tablet PC if this option is activated. If the option is disabled, you would not be able to start the signing process as not both of the configured signature devices are available. If no second signature device is defined, this setting has no effect. This option is disabled by default.

If a signature pad has been defined as either the first or second signature device and is no longer available because it is no longer connected to the computer for example, the signature pad is displayed in red font colour. You should check that the device concerned is connected properly or define another device as required.

### 2.5.2.1 Configuring the signature pad

If a signature pad has been defined as the first or second signature device, special settings can be made for this device.

Click the cog icon to open these special settings in a new window.



#### 2.5.2.1.1 Signature device settings

The signature device settings are available for the signature pads signotec Sigma, Sigma Lite, Omega, Gamma, Delta and Zeta, but not for the signotec Alpha.

Use the **Sampling rate** drop-down list to adjust the signature quality. You can choose between the values **125 Hz – Low bandwidth requirement**, **250 Hz – Default value** and **500 Hz – Very precise sampling**. The higher this value, the higher the quality of the signature. However, please keep in mind that this may cause the data volume to increase, which may affect your network performance depending on the connection type, as well as the file size of the signed document. The option '250 Hz – Default value' is selected by default.

This setting always relates to the type of signature device. Assuming two signotec Sigma signature pads are connected, it is not possible to set a sampling rate of 125 Hz for the first signature pad and a sampling rate of 250 Hz for the second signature pad. In such a case, the setting applies for both devices and is adjusted synchronously in both settings dialog boxes. If two different types of signature device are connected, for example a Sigma and an Omega, the setting applies only for the corresponding device type. The settings are saved permanently and used for any new connected signature pads of the same type.

You can use **Replace standby image** to configure a graphic that will be loaded into the configured (first and second signature device) signature pad when signoSign/2 is closed, if the graphic saved there differs from the one in signoSign/2. You can use the check box to activate and deactivate this option. Click the button with the three dots to access the 'Choose image...' dialog where you can select a graphic in the format **.bmp**, **.jpg**, **.gif** or **.png**. Alternatively, you can enter the path for the graphic and edit it directly in the input field. Please make sure that the graphic is the right size (see table below) as graphics of different sizes are not scaled.

Signature pad	Size
Sigma	320 x 160 px
Omega	640 x 480 px
Gamma	800 x 480 px
Delta	1280 x 800 px
Zeta	320 x 200 px



*The signature pad signotec Sigma Lite uses the setting of the signotec Sigma. However, this setting is ignored for the signotec Sigma Lite as it does not contain a display.*

Clicking the button with the arrow transfers the configured graphic directly to the signature pad and you don't have to wait for signoSign/2 to close.

This setting also always relates to the type of signature device, but manual transfer is only ever performed for the signature pad for which you have called up the configuration.

### 2.5.2.1.2 Display a preview of the document in the signature device during signing

The preview settings are available for the signature pads signotec Omega, Alpha, Gamma and Delta, but not for the signotec Sigma, Sigma Lite and Zeta.

You can display an excerpt of the document on the signature pad while a signature field is being signed.



*This preview option cannot be configured for the signotec Alpha as DIN A4 Portrait documents are already shown in full because of the size of the display.*

The horizontal and vertical spacing is entered as a percentage and it defines the **Spacings** between the signature field and the edge of the document. This makes it possible to determine the position of the signature field within the excerpt. Use the sliding scale beneath the sample excerpt to set the magnification level. A **Size** of 100% means that the display size in the signature pad corresponds exactly to a 1:1 print-out on paper. 200% corresponds to a signature pad display magnified by a factor of two. Magnifying simultaneously reduces the displayed area of the document.

If the **Highlight signature fields in the signature device** option is enabled, the position and size of the signature fields is indicated by a blue rectangle. This option is enabled by default.

In combination with this option, by selecting the **Limit the signing area to the signature field** option, you can specify that signing is possible only in the blue area. However, we recommend selecting this option only if the magnification level is sufficiently high, so that the displayed signature field is sufficiently large. If this option is not selected, the entire pad surface can be used for signing. The signature is then adjusted to the signature field when it is inserted into the document. This option is disabled by default.

### 2.5.2.1.3 Maintenance options

The maintenance options or settings are available for all signotec signature pads.

The unique **Serial number** for the signature pad is displayed. It can also be found on the sticker (see following example image) on the rear side of the signature pad beneath the barcode.

The **Firmware version** for the signature pad is also displayed. Please let us know the version on request if you need technical support.



You can use the **Adjust sensor** button to recalibrate the signature pad if entries on the signature pad are displayed offset from the pen position. A white area with a cross in the upper-left corner now appears on the signature pad display. Please press the intersection point of the two lines with the tip of the pen. Now the cross appears in the upper-right corner where you need to press the intersection point again. The pad is then recalibrated and displays the background graphic once more.

Please perform the calibration on the signature pad first and then confirm the dialog box that opens when the adjustment is started.

Furthermore, you can use the **Service menu** button to access the configuration menu for the signature pad. In this menu, you can modify settings for the display brightness or the connection type and its configuration, depending on the particular signature pad. Further information is provided in the manual for the signature pad on our website.



*The Service menu cannot be called up for the signotec Sigma or Sigma Lite as these settings cannot be configured.*

Please make the changes on the signature pad first and then confirm the dialog box that opens when the service menu is started:

## 2.5.2.2 Configuring the IP list capture plug-in

If the IP list capture plug-in has been defined as the first or second signature device, special settings can be made for this plug-in.

Click the cog icon to open these special settings in a new window.



### 2.5.2.2.1 Available IP adapters

To operate a signature pad through the USB Ethernet adapter, make sure that this is connected properly and is therefore available on the network. You can use the tool [XT Admin XXL](#) to configure the adapter. If this is the case, the IP adapter should be displayed in the list of available IP adapters, provided that it is in the same IP range as the PC.

Click the **Refresh** button to refresh the display of the available IP adapters at any time. This will remove IP adapters that are no longer available or that have already been configured from the list. IP adapters that have been newly added will be displayed.

Use the **Identify** button to establish which signature pad is addressed via which IP address. A lamp briefly lights up on the signature pad for identification purposes.

The **Add** function allows you to assign an available IP adapter to the plug-in so that the signature pad can be selected for signature capture. After the button is clicked, a new window opens in which you can enter a **Description** for the IP adapter. After you have

clicked **OK**, the IP adapter appears in the **Assigned IP adapters** list. **Click Cancel** to cancel the process so that no ID adapter is added.

#### **2.5.2.2.2 Manual input**

If the signature pad or the USB Ethernet adapter is not in the same IP range as the computer, but you want to use it anyway, a signature pad can be defined manually. In addition, the signotec Alpha and Delta signature pads, which do not require an adapter, can be added in Ethernet mode. To do so, enter the **IP address** of the adapter or signature pad and the **Port** via which communication takes place and click **Add** to include it in the list of assigned IP adapters. You can also identify a signature pad here using the corresponding **Identify** button. A lamp briefly illuminates on the signature pad for identification purposes.

#### **2.5.2.2.3 Assigned IP adapters**

You can change the description of the signature pad here using the **Edit** button. Click **Delete** to remove the configured signature pad from the list of assigned IP adapters again so that it can no longer be used for signature capture.

If an assigned signature pad is no longer available because it has been removed from the network or power supply, it is shown in red and cannot be used for signing. In this case, you should check that the signature pad concerned is connected properly.

#### **2.5.2.3 Configuring the Mobile capture plug-in**

The Mobile capture plug-in does not require any special configuration; hence, assignment as the first or second signature device is sufficient.

Please refer to [here](#) for more information.

#### **2.5.2.4 Configuring the SmartCard Signing plug-in**

The SmartCard Signing plug-in does not require any special configuration; hence, assignment as the first or second signature device is sufficient.

Please refer to [here](#) for more information.

### **2.6 Scanner and webcam settings**

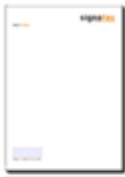
#### **2.6.1 Use the interface of the scanner driver (recommended)**

signoSign/2 offers you the option to scan a document using a locally connected scanner and attach it to the end of the document that is actually open. This option is enabled by default.



*In this variant, communication takes place via the TWAIN interface of the scanner.*

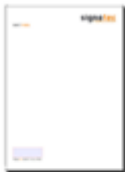
On the one hand, you can define the **Size of appended pages**. Here you can choose between **Like last page of document**, **Same size as scanned image**, **DIN A4 Portrait** and **DIN A4 Landscape**. The setting 'Like last page of document' is selected by default.



Here, the scanned page was inserted with the setting **Like last page of document**. This means that the appended page has been inserted in the same size as the last page of the opened document.



Here, the scanned page was inserted with the setting **Same size as scanned page**. This means that the appended page has been inserted in the size that is stored in the TWAIN scanner settings (in this case, DIN A5).



Here, the scanned page was inserted with the setting **DIN A4 Portrait**. This means that the appended page was inserted in the format DIN A4 portrait, irrespective of other settings or last pages.

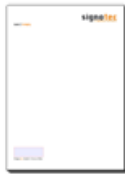


Here, the scanned page was inserted with the setting **DIN A4 Landscape**. This means that the appended page was inserted in the format DIN A4 landscape, irrespective of other settings or last pages.

On the other hand, you can define the **Size of inserted images**. Here, you can choose between **Only shrink too large images** and **Fit image to page**. The default setting is 'Only shrink too large images'.



Here, the DIN A5 page was scanned and appended with the setting 'DIN A4 portrait'. As the scanned image was not too big, it was inserted 1:1. There was thus no need to apply the setting **Only shrink too large images**.



Here, the DIN A5 page was scanned and appended with the setting 'DIN A4 portrait'. As the scanned image should be fitted to the page, it was scaled to DIN A4. The setting **Fit image to page** was thus taken into consideration.



## 2.6.2 Use the interface of signoSign/2

You can also use this option to scan a document using a locally connected scanner and append it to the document that is currently open. This option is disabled by default.



*In this variant, communication takes place via the WIA interface of the scanner.*

On the one hand, you can define the **Color depth**. You can choose between **Black and white (1 bit)**, **Greyscale (8 bit)** and **Color (16 bit)**. The option 'Greyscale (8 bit)' is selected by default.

Furthermore, you can specify the **Resolution** and therefore the image quality. The higher the resolution, the better the quality of the scanned image. You have the choice between **Low – Low storage space requirement**, **Medium – Medium storage space requirement** and **High – High storage space requirement**. The default setting is 'Medium – Medium storage space requirement'.

You also have the possibility to define the **Brightness** and **Contrast** using the slider control. If the image should be scanned darker with a low contrast, you must move the control to the negative area. If the image should be scanned brighter with a strong contrast, you must switch to the positive area. The default setting for both values is 0.

## 2.6.3 Webcam settings

You can use the webcam settings to set custom names for the buttons to capture images, under **Name of the first image** and **Name of the second image**. Nothing has been stored here by default, so the buttons are named Capture first image and Capture second image.

## 2.7 Settings for resubmission

### 2.7.1 General settings

Resubmission can be used to save documents temporarily. You can use **Use resubmission** to activate the function. This is useful if, for example, not all signers are available at the time of the signature capture, and therefore the document has to be opened again later before subsequently being archived. The corresponding functions will be displayed in the menu bar and the quick access toolbar only if the setting is activated. This option is disabled by default.

There are two options for the **Storage location**. **signoStorage** is an additional fee-based application that makes it possible to save the document to a database so that it can be called up later via a selection dialog in signoSign/2. The application is installed on a server and various settings can be applied, such as creating groups for users to control which users can see and call up which documents. Alternatively, you can select **File system** to have the document saved to a predefined folder, also with the option of subsequent access from a selection dialog in signoSign/2.

### 2.7.2 Settings for signoStorage

If signoStorage has been selected, you will need to save certain information in the configuration. In the **URL** field, you enter the server address via which signoStorage can be accessed. In the **User name** and **Password** fields, you must enter the correct login information in order that signoSign/2 may connect to signoStorage. The option **Use remarks** defines whether an input field will be displayed underneath the toolbar. This makes it possible for you to define text that will be stored for the document as a remark when it is saved in signoStorage.

### 2.7.3 Settings for resubmission in file system

If file system has been selected, you will need to save a folder under the item **directory** where the documents will be stored temporarily. Clicking on the corresponding button opens a new window. There, under **Access with logged in user account (Default)**, you can click the corresponding button in the find folder dialog to select a storage location that will be used for the temporary storage. The default directory is **%USERPROFILE%\Documents**.

Alternatively, you can select **Access with different user account** and make the necessary entries for the archiving in the **Directory**, **User name**, **Domain** and **Password** fields. Click **OK** to perform a check with the saved data on the target directory for the purpose of accessibility and authorisation.

## 2.8 Customising the user interface

### 2.8.1 General settings

The general settings allow you to change the appearance of the Quick Access toolbar. Select **Use small symbols in quick access toolbar** to display small icons instead of the normal icons. This option is disabled by default.

You can also choose to **Display texts in quick access toolbar**. This makes it easier to understand what function each icon represents. This option is disabled by default.

### 2.8.2 Menu item

Select or deselect the checkboxes in **Function available** to activate or deactivate the individual functions of the menu items. All functions are activated by default.

Select the checkbox for the relevant option in the **Display in quick access toolbar** column to control which icon should be displayed in the toolbar. All icons are activated by default.



In the associated input fields, you can enter your own text under **User-defined text**. This text will then be used in the menu item, in the optional Quick Access toolbar as text and in the tool tip.

Please note that when an option is disabled, the associated shortcut key is no longer available (for example, **Ctrl + F** for **Search**). The configuration and the document type administration are an exception to this rule. The **F8** shortcut key always opens the configuration dialogue box, no matter which setting has been made. The same applies for the **F9** shortcut key and the document type administration dialog. Therefore, you should always use a user name and password to protect against unauthorised access.

## 2.9 Main index file settings

### 2.9.1 Content of the main index file

The index file can be created during the archiving process, and the file structure can be defined as desired. In this area, you configure the main index file, which is used by all document types. The default setting is %docTypeIndexFile%.

To enable the content from the index file of the corresponding document type to be entered at a later time, you must enter the variable **%docTypeIndexFile%** in the main index file.

An example of the structure is given below:

Content of the configuration of the main index file

```
<?xml version = "1.0" encoding = "utf-8"?>
<content>
<target>signotecArchive</target>
<information>%docTypeIndexFile%</information>
</content>
```

Content of the configuration of the [setting](#) **Content of the index file** for the document type

```
<name>%var1%</name>
<date>%dateFileName%</date>
<number>%var2%</number>
```

Content of the index file after archiving

```
<?xml version = "1.0" encoding = "utf-8"?>
<content>
<target>signotecArchive</target>
<information>
  <name>Ferenc Hilker</name>
  <date>04.02.2019</date>
  <number>1896</number>
</information>
</content>
```

## 2.10 Plug-in information

### 2.10.1 Information on the plug-in

The list on the left shows which plug-ins you currently have installed. Selecting a plug-in displays information such as **Name**, **Description** and **Company** (manufacturer).

The following plug-ins are currently available from signotec:

```
signotec signoSign/2 IP list capture plug-in
signotec signoSign/2 mobile capture plug-in
signotec signoSign/2 SmartCard Signing plug-in
```

Any plug-ins that are installed but not licensed are shown in red. Please ensure that your licence supports the plug-in to be used. In the 30-day demo version of signoSign/2, it is not possible to use any of the plug-ins listed.

## 3 Document type administration

In signoSign/2, you can create document type templates. These templates are especially useful for documents that have the same structure, such as invoices. signoSign/2 is able to use identification definitions to recognise the matching document type when opening a document and to use templates to load the settings for creating signature fields, performing customised, automated processing and much more. The following sections explain how to create document types and the available options.

You can open document type administration via the menu **Tools > Document types...**. You can also open the document type administration with the **F9** key or the Quick Start bar icon.



### 3.1 General settings

#### 3.1.1 List of document types

The left side of the window displays the list of configured document types. Deactivated document types are greyed out in the list. The settings displayed on the right and all changes made here always relate to the document type selected in the list. The default setting is the document type 'All other documents', with settings that can also be used as standard values for future document types.

In addition to the document type name, the document type **Version** is also displayed. The version is updated every time the document type is changed and saved.

For all documents opened in signoSign/2 for which no document type has been administered or could be found, the settings for the document type **All other documents** are used. Please note that not all settings are available for this general document type.

#### 3.1.2 Document type functions

Several functions are available for the document types. These functions are shown below the list of document types.



##### **New document type from current document**

This option is available if at least one document is opened in signoSign/2. Click the icon shown above to create a new document type and use the currently active document as a template file.



##### **New document type**

Click the icon shown above to create a new document type. An 'Open file' dialogue box then appears. Select the document to be used as the template file for the new document type.



##### **Copy document type**

To copy an existing document type, first select the document type to be copied from the list so that it is highlighted and then click the icon shown above.



##### **Delete document type**

To delete an existing document type, select the corresponding document type from the list, and then click the icon shown above. This marks the document type for deletion. The document type to be deleted is marked with a line through it in the list.

If you click on the button **OK** or **Apply**, you will be asked if you are sure that you want to delete the document types marked for deletion. Depending on how you respond, they will

then be deleted or you will be returned to the document type administration. Click **Cancel** to keep the document types and not delete them. All unsaved changes are also discarded and the document type administration is closed.

  **Change order of document types**

The document type order is important if the identification definitions for one document type are a subset of the identification definitions for another document type. If this is the case, more specific document types should come before less specific document types. signoSign/2 always uses the first document type in the list, from which all identification definitions are found. To move the respective document type up or down within the list, select it and click the icons shown above.

 **Export document type**

Click the relevant icon to export the selected document type with its defined settings. This opens a Save as dialog where you can select the storage location and the file name of the XML file. The template files are not exported. You cannot export the 'All other documents' document type.

 **Import document type**

Click the relevant icon to import an exported document type with its settings. The imported document type is added to the end of the document type list. If the document type already exists, you will be asked whether you want to replace the current document type with the document type being imported. It is not the file name that is relevant here, but the document type ID, which is not displayed. Click **Yes** to replace the document type. The version numbers of the two document types are shown to provide a clearer overview. If you click **No**, the document type will not be imported.

 **Check for uniqueness**

To check whether your document types have been defined in a way that enables specific identification, click on the relevant icon. The identification definitions of all active document types will then be checked. Document types that are deactivated or marked as deleted and document types with no identification definition are not included in the check. The check involves attempting to determine the document type on the basis of the template file, in order from top to bottom. If the check for a document type is successful, the next document type will then be tested, starting from the first template again as reference. If the document type identified for the document type being tested on the basis of the template file is incorrect, an error message will be displayed stating that the relevant document types could not be specifically identified. In this case, please check the saved identification definitions and change them to enable a specific identification. You will also be informed if the test does not reveal any problems.

### 3.1.3 Document type

After you create a document type, it automatically receives a name based on the name of the template file. This **Name** is displayed in the list of document types. You can change this name if you want.

You can also enter a **Description** for every document type. This description, which is a text of your choice, is visible only in the document type administration. You can optionally add a short descriptive text to make it clearer which document type is involved or internal remarks to this field.

Under **Template file**, you will see the name of the document that you selected as a template for administering the document type. This file is saved in **signoSign2\_DocTypTemplates.zip** in **%PROGRAMDATA%\signotec\signoSign2** (standard path, may differ if the [setting Directory for document types](#) has been configured differently) with a specific ID for this document type. You can select a different template file using the button. By default, the name of the template file is saved and cannot be edited.

Finally, you can use the setting **Use document type** to disable the document type. This will cause the document type to be ignored in the detection. This can be useful if you want to create a document type but aren't yet ready to make it active or if you simply want to deactivate it rather than definitively deleting it, for example. If the document type is deactivated, it will be displayed in grey in the list of document types. This option is enabled by default.

### 3.1.4 Identification definitions

For every document type that you create, you can select one or more identification definitions. If you create a new document type, the list of identification definitions will be shown with a red outline, as this is an important setting. It is not a mandatory field, as the detection of document types can also be determined via SML files, which will be explained in a later section. However, remember that only document types with identification definitions are taken into account during automatic identification. To add an identification definition, click the following icon.



A new window opens showing a document preview on the left and the raw text contained in the document on the right. If no text is displayed, the template file is not suitable for the identification definitions.

If there is readable text, you can now highlight a word that is helpful for identifying your document. The marking of the search term must not cover multiple lines.

You can also enter the word into the field **Search term** and then search for this definition by clicking the relevant button. If the definition is contained in the document, apply the identification definition by clicking **OK**. Clicking **Cancel** discards the changes that have been made and returns you to the main window of the document type administration. If there are multiple instances of the definition, click of the search icon again to select the next instance. The search results are displayed on the left in the preview, highlighted in yellow.

You can use **Type** to specify on which page of your document you should search for this definition for the identification definition. You can choose between **Any page**, **Specific page** and **Last page**. If you have selected the setting Specific page, you now need to use the search button to search for the definition. Under **Page** the page number is automatically saved that contains the found search term. For the options Any page and Last page, this value is not of importance, and it is therefore disabled. The option 'Any page' is selected by default.

The selected identification definitions are shown in the list and all must match for the identification of the document type (AND-linked). For the identification, it is not sufficient for two out of three identification definitions to match, for example.



*Make sure that you select unambiguous identification definitions. They should only apply to the corresponding document type, to enable signoSign/2 to differentiate/assign identity.*

You can use the following button to edit or delete existing identification definitions.



**Edit identification term**



**Delete identification definitions (without prompt)**

### 3.1.5 Document processing

Under document processing, you can specify how the document should be displayed when it is opened. Do this by using the setting **Resizing on opening**. You can choose between the settings **No adjustment**, **Fit to page width** or **Fit to page height**. The default setting is 'No adjustment'.

In addition, you can decide which mode is to be started **After opening the document**. The default setting is 'Edit form fields'.

If **Do nothing** is selected, the document is merely opened and shown.

With **Edit form fields**, the form mode is opened so that the existing form fields can be edited. If the document does not have any form fields, the form mode will not be enabled.

**Start signing** starts the signing process on the configured signature pad. If no signature pad and no signature field have been configured, an attempt is made to start the interactive signing process (if enabled) on the signotec Alpha or Delta, which needs to be in WinUSB mode. Otherwise nothing happens. If no signature pad but at least one signature field is configured, an attempt is made to start the signing process on a connected signature pad, which needs to be in HID or WinUSB mode. Otherwise nothing happens. If a signature pad is configured but no signature field, nothing happens unless the interactive signing process is enabled and a signotec Alpha or Delta in WinUSB mode is saved. If both signature pad and signature field are configured, the signing process is started as normal.

With the **Capture signature manually** setting, the application switches directly to the mode that allows you to draw one or more signature fields with the mouse. This disables the setting **Only allow available signature fields to be signed**, as this is a basic requirement and can thus not be unselected.

With **Start scanning**, a scan will be started according to the settings defined in the configuration. If no scanner is connected, you will be notified accordingly.

With the **Archive immediately** setting, you can specify that the document should be archived immediately. All other settings under 'Document processing' are disabled accordingly. Please note that immediate archiving is not possible if the document contains mandatory fields and the setting **Only allow archiving when all signature fields have been signed** is enabled.

With **Close immediately**, the document is opened and directly closed again without a user prompt. All other settings under 'Document processing' are disabled accordingly.

By selecting **Print**, the document is printed immediately according to the print settings. If no configuration exists in the print settings, the print dialog will appear.

The last setting you can select is **Print and close**; if selected, the document is first printed and then closed. Here, too, you need to pay attention to the print settings.

You can use the setting **Delete XFDF files after opening** to specify whether the relevant file should be deleted after the document has been opened in signoSign/2. This type of XFDF file can be used to fill the form fields in the document being opened automatically with the values saved in the XFDF file. This is only possible if the path to the document and the values are specified in the XFDF file. It is sufficient to specify the file name rather than the entire path if the XFDF file is stored next to the document. The XFDF file can then be opened with signoSign/2. An example is given below. This option is enabled by default.

```
<?xml version="1.0" encoding="UTF-8"?>
<xfdf xmlns="http://ns.adobe.com/xfdf/" xml:space="preserve">
<f href="Test.pdf"/>
<fields>
  <field name="E-Mail">
    <value>ferenc.hilker@signotec.de</value>
  </field>
</fields>
</xfdf>
```

The setting **Backup and restore incomplete processed documents** causes a backup to be created under **%APPDATA%\signotec\signoSign2\Backup** after the document is opened. The directory cannot be configured and if it is not present it is automatically created by signoSign/2. The name of the backup is made up of the name of the original

document (max. 30 characters) and a GUID. For example: *Test\_450f7d86-3f4b-460d-959b-c82db4f190a8.sbf*. If the original document has been archived, the backup is subsequently deleted. If the original document was closed without being archived, the backup is retained and opened automatically the next time signoSign/2 is restarted. If the directory contains several backups, all will be opened automatically. This option is disabled by default.

You can use the setting **Only allow available signature fields to be signed** to specify whether the signing process can only be started if the document contains signature fields. This means that signature fields cannot be drawn manually with the mouse and the interactive signing process is not started if there are no signature fields (free signing). This option is disabled by default.

You can also use **Allow filling out of signed documents** to define whether the document's form fields can still be filled out after a signature has been inserted. Please also bear in mind the setting **Lock form fields** in the signature field settings in this regard. This option is enabled by default.

Furthermore, you can use **Automatically launch archiving after signing process** to configure whether the document should be archived automatically once it has been signed. However, this happens only if the configured conditions in accordance with the [settings](#) **Only allow archiving when all signature fields have been signed** or **Only allow archiving with minimum number of signatures** have been met. Skipping signature fields is no problem, but if the signing process is cancelled, the setting will not take effect and the archiving must be initiated manually. This option is disabled by default.

You can use the **After closing the document** drop-down list to specify which action is to be performed after the document has been closed. The default setting is 'Prompt to save'.

If **Prompt to save** is selected, a corresponding prompt appears when closing the document, if any change has been made to the document. By selecting **Yes**, the original file is overwritten with the changes. If you click **No**, the changes to the document are discarded and the document will be closed. Press **Cancel** to go back to the document. If no changes were made to the document, the document is closed without any prompt.

If the setting **Prompt to Save As...** has been selected, a corresponding prompt appears when closing the document, if any change has been made to the document. If you select **Yes**, a 'Save as...' dialog will be displayed where you can specify file name and storage location. If you click **No**, the changes to the document are discarded and the document will be closed. Press **Cancel** to go back to the document. If no changes were made to the document, the document is closed without any prompt.

The **Prompt to save in resubmission** setting is only relevant if resubmission is used. A corresponding prompt appears when closing the document, if any change has been made to the document. If **Yes** is selected, instead of the original file being overwritten in the file system, the file will be stored in resubmission, provided that the resubmission is enabled and configured. If you click **No**, the changes to the document are discarded and the document will be closed. Press **Cancel** to go back to the document. If no changes were made to the document, the document is closed without any prompt.

The setting **Prompt to archive** causes a prompt to always appear asking whether the document should be archived in accordance with the archiving settings, regardless of whether anything in the document has been changed. By selecting **Yes**, the document is stored in accordance with the settings. If you select **No**, the document and any changes made to it will also be discarded. Click **Cancel** to go back to the document.

Alternatively, you can select **Archive automatically**, in which case the document is stored in accordance with the archiving settings without a prompt.

### 3.1.6 Content to insert after opening the document

This setting allows you to automatically insert images or text into the document after it has been opened. You can configure new content for insertion using the following button.





A window opens, in which you must first define a **Name** for the content. This enables a better overview in the list of contents and is a mandatory field.

If you wish to configure an **Image file**, you can click the button with the three dots to open an 'Open file...' dialog box, and select a **\*.bmp**, **\*.jpg**, **\*.gif** or **\*.png** file. Confirm the selection with **Open** and select **Cancel** to close the selection dialog and return to the administration. Alternatively, the path to the image file can also be entered, edited or deleted manually. No check is performed as to whether the path links to a valid image file. This field is only a mandatory field if no text has been configured.

Instead of or in addition to an image file, you can configure a **Text**. The text can consist of a user-definable text and/or the available placeholders. This field is only a mandatory field if no image has been configured. You can configure the text using the following settings.

Use the **Font** setting to define the font for the text. The default setting is 'Arial'.

**Font size** allows you to define the size of the text. With **Automatic**, the font size is based on the size of the drawn area, which is defined by means of **Set position**. Otherwise you can choose between fixed font sizes between **8** and **72**. The option 'Automatic' is selected by default.

Another setting is the **Background color** of the text. You can choose between various colours. This setting is disabled as soon as an image file has been configured, as the graphic is then the background for the text. The default setting is 'Transparent'.

You can also use the **Set position...** button to select where in the document the image or text is to be inserted. A window opens where you can see a preview of the document on the left and see the text in the document on the right. The alignment and the size of the note can be defined with the **Absolute positioning**. This causes the note to always be inserted in the document in the configured position. You can change the position of the coloured field using drag and drop or change its size by pulling the little black boxes. Alternatively, you can also edit the position manually using the values **Page**, **Left**, **Up**, **Width** and **Height**.



Alternatively, you can also switch to **Relative positioning**, in which case the position relates to the search term. First, you must mark the **Search term** in the text to the right of the document preview; the position is then suggested in colour. Alternatively, you can enter a term in the input field and then click the relevant button to search for it in the document. You will be informed if the term is not found. Click on the button again to attempt to find the next occurrence of the search term if it appears several times in the document. The **Use every occurrence** setting allows you to specify that a note should be inserted according to the defined size and offset in relation to the search term whenever the defined search term is found in the document. In this way, you are able to define a note for a n positions. This is useful, particularly for documents that can have a variable length. You can then change the position using drag and drop or change the size by pulling the little black boxes. The values **Offset left**, **Offset up**, **latitude** and **Height** are updated automatically; no manual adjustment is needed. Click **OK** to confirm the position; you can discard the changes by clicking **Cancel**. The default setting is 'Absolute positioning'.



**Edit note**



**Delete note (without prompt)**





Please note that the document loses its conformity with PDF/A if you insert images and/or text with a transparent background. This note only applies to PDF/A-1b documents.

### 3.1.7 Split document

The option **Split document** allows you to split a multi-page document with signoSign/2; the separated document can belong to a different document type. This option is disabled by default.

First, you can define the **split type** by choosing between **Fixed number of pages**, **Number of pages from document** and **Search term not found**. The default setting is 'Fixed number of pages'.

If **Fixed number of pages** is selected, you must enter the number of pages after which the document is to be split in the **Number of pages** field. So if, for example, the document is a four-page document and you want it to be truncated after the third page, you must enter a **3**. The fourth page will be opened as a separate document and can belong to a different document type.

If **Number of pages from document** is selected, the text changes from **Number of pages** to **Number from document**. For this setting, you must configure a placeholder that identifies the number from the document after which the document should be truncated. How to define this type of placeholder is explained [here](#). Click the button with the three dots to define this placeholder. For example, the term **Page 1 of** could be searched for in the footer using 'Start term and end of line'. The value determined would be the number **3**, which is visible in the Preview field. Therefore, a five-page document, for example, would be truncated after the third page and the following two pages would be opened as a separate document. This placeholder is configured separately from the other placeholders, and can only be used in this option.

If **Search term not found** is selected, the text changes from **Number of pages** to **Search term**. A term must be defined there that is searched for in the document. If this term does not appear, or no longer appears, on one of the pages, then this will be the first page of the new document. For example, **Kundenausfertigung / customer copy** could be defined as the search term. In a six-page document where this term is found on the first three pages, the document would be truncated after the third page, and the following three pages would be opened as a separate document.

In addition, there is the **Name of separated document** setting. Here, you can define the name of the new, split document. If, for example, **Leer\_DE\_EN** is defined here, this will be the name of the file and will be displayed on the tab. If you do not define a name, the split document will have the same name as the original file, along with a counter in brackets. If the original document is called **Document\_DE\_EN**, for example, the new split document would be called **Document\_DE\_EN (1)**.

## 3.2 Print settings

### 3.2.1 General settings

To enable printing without a print selection dialog, the **Default printer** option can be used to define a printer for this document type. You can select one of the available printers, **Default printer** or **No selection**. If you have defined the **Default printer**, the printer saved as the default printer in Windows will be used. If **No selection** is chosen, the print dialog will be displayed when you print, where you can select the printer. The default setting is 'No selection'.

The **Number of copies** option allows you to specify how many copies of the document in question are to be made. To this end, you can use placeholders via the Plus button. This

means that you can also obtain the number of copies from the document itself. This setting impacts the manual start of the print process via the relevant print icon and, if enabled, automatic printing when archiving and if a document should be printed or printed and closed after being opened. A print selection dialog no longer appears in any of these cases. If **No selection** is chosen, the print selection dialog appears as usual, where you can enter the number of copies. The value 1 is entered by default.

### 3.2.2 Print custom text starting with the 2nd copy

User-defined text can be inserted in a document when it is printed. Text is inserted in a location you have defined from the second copy onwards. This option is disabled by default.

To do so, enter the appropriate text that is to be inserted in the document under **Text**. Nothing has been stored by default.

You define the position by the distance in pixels from the top left border under **Distance top** and **Distance left**. The best way to find out whether the text is positioned in the desired place is to perform a test printout, so you can correct the data as needed until the position is correct. The value 0 is entered by default.

## 3.3 Signature field settings

### 3.3.1 Global signature field settings

These settings apply to all signature fields regardless of whether they are created automatically by signoSign/2, drawn using the mouse or are already part of the document.

The first setting, **Time stamp in signature**, allows you to specify whether the signature fields should have a time stamp and, if so, the display format for the time stamp. A drop-down list is provided for selecting the desired format. You can choose between various formats and **Do not display**. The time stamp corresponds to the date and time when the signature field was signed and it is inserted at the bottom in accordance with the [setting Origin of time of signature](#). The default setting is the format DD.MM.YYYY hh:mm.

The second option allows you to specify the **Color of signature additions**. This includes the time stamp and the optional data from the setting **Allow the input of additional information during signing**. Various colours are available. The default setting is 'Dark grey'.

You can also define the **Alignment of signature additions** (the time stamp and optional entry) within the signature field. You can choose between **Left-aligned**, **Centred** and **Right-aligned**. Depending on your selection, the signature additions are aligned with the bottom edge of the signature field. The option 'Left-aligned' is selected by default.

With **Lock form fields** you can determine which form fields should still be available once a signature has been inserted. You can choose from the options **All**, **As defined in the document** or **Filled and defined in the document**. With **All**, all form fields (apart from signature fields) are locked when a signature has been inserted and can no longer be edited. If **As defined in the document** is selected, all form fields that are dependent on the signed signature field according to their properties are locked once the signature has been inserted, whether they have been filled out or not, The dependency cannot be defined in signoSign/2; this must be done when the PDF form is created. The option **Filled and defined in the document** locks all form fields once the signature has been inserted that either have been filled out or are dependent on the signed signature field according to the properties. The option 'Filled and defined in the document' is selected by default.

The setting **Biometric Data** defines whether recorded biometric data should be saved. The options **Use configured setting**, **Collect and save** or **Do not collect and save** are available. For **Use configured setting** the [setting Capture biometric data and save them into the document](#) from the configuration is used and applied accordingly. If **Collect and save** is selected, the biometric data of the signature is saved. If the option **Do not collect and save** is selected, the biometric data of the signature is not saved. The default setting is 'Use configured setting'.

The setting **Display an information in the capture dialog** expands other settings when enabled and then reads **Display the following information in the capture dialog**. This setting allows you to specify whether information should be displayed during the signing process. The text is displayed underneath the signature dialog and can be configured as desired. You can also activate additional entry with the setting **Allow the input of additional information during signing**. This causes a text field to be displayed underneath the information text where you can enter information which will be printed as information in the signature field above the time stamp once the signature has been confirmed. Activating these options also activates the three other settings. With **Default for input** you can define a value that will be entered in the input field by default. While the signature is being captured, you can, of course, edit and change this value. With **Store in field**, you can specify whether the entry should be entered in one of the signature properties of the signature field. You can choose the information **Reason, Location, Contact Info, lives up to its name** or **None**, which causes the entry not to be saved anywhere. For example, you could configure the information *Please enter the location* and specify *Hannover* as the default value and save it in the field **Location**. If the document has been signed, you can find this information in the signature properties of the signature field. By the last setting **The input of additional information is mandatory**, you define whether the text field must be filled or not. This option is disabled by default.

You can also use **A text must be confirmed in the pad before the signing process** to define whether a confirmation text should be displayed before the signature capture dialog. When activated, this expands further settings and then reads **The following text must be confirmed in the pad before the signing process**. This text is displayed before the signature dialog on the signature pad and can be configured as desired. The signer can only access the signature dialog if this confirmation text is accepted. If the text is rejected, the signature process is cancelled and a corresponding message is displayed to the user. You can also use **Store in field** to specify whether the defined confirmation text is to be entered in one of the signature properties of the signature field. For example you could configure the confirmation text *As part of capturing your signature, dynamic characteristics such as pressure and writing speed are processed. The secure storage of these biometric data in the document is done in order to later prove that the document has been signed by you* because of the GDPR and saving in the field **Reason**, so that after the signature has been inserted, the information about the confirmation of this text is stored in the signature properties of the signature field. This option is enabled by default.

The next option is **Display a text during signature capture**, which after activation becomes **Display following text during signature capture**. This setting causes the name of the signature field to be displayed on the signature pad at the top of the display when **Use field name** is enabled. Alternatively, you can deactivate the use of the field name to define your own text for display in the input field below. You can also use **Store in field** to specify whether the defined display text is to be entered in one of the signature properties of the signature field. You can choose the information **Reason, Location, Contact Info, Name** or **None**, which causes the text not to be saved anywhere. For example, you could define the display text `%var1%` where the contact information of the signer is read (if configured as a placeholder with the [function Define placeholder](#)), i.e. *Ferenc Hilker, Schützenweg 1b, 31637 Rodewald* and save this in the field **Contact Info**. This would save this information accordingly in the signature properties of the signature field. This option is disabled by default.

Alternatively, you can make different settings for each signature field, as described below.

The setting **Use interactive signing mode (if supported by the signature device)** can be activated as an alternative to normal signing mode. This mode allows more extensive control within the signature pad and is suitable if the customer is to have the option of reading through the document to be signed on the signature pad. To be able to use it, you must have a signotec Alpha or Delta signature pad. If the interactive signing mode is enabled and no corresponding signature pad is configured, the normal signing

mode will be used and the setting will be ignored. This interactive signing mode is a further development of the former 'Alpha mode'.



*The maximum number of pages of a document for use with the Delta signature device in interactive signing mode is 21 DIN A4 pages, 30 DIN A5 pages and 42 DIN A6 pages. For longer documents, the normal signing mode must be used.*

As the last option, you can use **Use static instead of virtual signature fields** to define whether the signature fields will be permanently inserted in the document, i.e. whether they will also be available outside of signoSign/2. Otherwise the signature fields will only be available as long as the document is open in signoSign/2. Please note that static signature fields will not be inserted into a PDF/A-compliant manner and that your documents will no longer be compliant if they are used. Furthermore, it should be noted that this setting must be made before a corresponding document is opened. If you change the setting while a corresponding document is open, the change cannot be made to the open document and only applies to the next document that is opened. This option is disabled by default.

### 3.3.2 Defining signature fields

You can create signature fields for your document so that they do not need to be drawn manually. These signature fields are not permanently inserted and are therefore only available as long as the document is open in signoSign/2. You can use the following button to configure a new signature field.



A new window opens showing a document preview on the left and the raw text contained in the document on the right. There are two ways to define a signature field. Use the option **Relative positioning** to configure a signature field based on a search term that the document contains. This is useful if the structure/content of the document is variable but the search term for the signature field is always the same regardless of the position. To do this, select a search term in the window on the right (*e.g. Customer signature*) which is always included for this document type or alternatively enter the search term in the text field **Search term** and then click the relevant button to search for it. The first occurrence of the search term is then highlighted in yellow in the left window. You can also see via the light blue area the coloured signature field, which you can drag and drop to a desired position or adjust the size of by pulling the little black boxes. If the defined search term occurs several times and you want to define the signature field for one of the following occurrences, click the search button again until the correct **Occurrence** is stored. The **Use every occurrence** setting allows you to specify that a signature field should be inserted according to the defined size and offset in relation to the search term whenever the defined search term is found in the document. In this way, you are able to define a signature field for n signature fields. This is useful, particularly for documents that can have a variable length. Below this, you can set an offset to the left and up which defines the distance between the signature field and the search term. If you enter a positive value for **Offset left**, the signature field is moved to the right by that value. If you enter a negative value using a minus sign, it is moved to the left by that value. The same procedure applies to **Offset up**. If you enter a positive value, the signature field is moved upward. If you enter a negative value, the signature field is moved downward. If you move the signature field using drag and drop, the values are updated automatically. You can use the values **Width** and **Height** to determine the size of the signature field. The display of the signature field in the preview is adjusted after each change of the values. The values are also updated automatically when you adjust using drag and drop.

Instead of using relative positioning, you can also select **Absolute positioning**. This is useful if the structure/content of the document is permanently defined so that the position of the signature field is always in the same place. Rather than being based on a search term, the positioning must be fixed. Here, too, you can change the position of the light blue signature field in the preview using drag and drop or adjust the size. The values **Left**,

**Up**, **Width** and **Height** are updated automatically. For positioning on another page in multi-page documents, the corresponding value must be entered manually under **Page**. The position and size can also be edited manually and are updated in the preview immediately.

Click **OK** to finish the configuration. The dialog will then close and you are taken to the window **Edit signature field settings...** Clicking **Cancel** discards the settings and you are taken back to the main window of the document type administration.

### 3.3.2.1 General settings

**Field name** displays the name of the signature field, which must be unique. You can assign any name and change it. If the signature field was defined by a search term (relative positioning), the search term is stored as the field name by default. If the option **Use every occurrence** is also activated, a counter is appended to the field name. If the signature field was stored using absolute positioning, **New signature field** is stored as the field name by default. A counter may be added if a signature field with the same name already exists.

Under **Time stamp in signature** you can specify whether the signature field should have a time stamp and, if so, the display format for the time stamp. With **Color of signature additions**, you can define which colour the additions (time stamp and optional entry) should have. You can also define the **Alignment of signature additions** (the time stamp and optional entry) within the signature field. The following applies for all three settings: The option **Use global setting** means that the [setting Alignment of signature additions](#) from the global signature field settings are used and not signature field-specific ones. Alternatively, you have the same options available here as in the global signature field settings. By default, the 'Use global setting' option is selected for all three settings.

The next property is **Mandatory field**. Here you can select whether the signature field should be a mandatory field. Mandatory fields are depicted in red, and optional signature fields in blue. This option is disabled by default.

**In the case of dual-pad operation, capture the signature on the second pad** is relevant only if you have connected two signature pads. You can use this option to specify that the corresponding signature field will be captured via the device that you have set as the second signature pad. If only one signature pad is connected and configured, this setting is ignored. This option is disabled by default.

### 3.3.2.2 Display the following information in the capture dialog

Using the setting **Display the following information in the capture dialog**, you can specify whether corresponding information should be displayed during the signing process. The option **Use global setting** means that the [settings Display the following information in the capture dialog](#) from the global signature field settings are used and not signature field-specific ones. Alternatively, you can use the options **Do not use** or **Use individual text**. The latter offers the same setting options as the global signature field settings. The default setting is 'Use global setting'.

### 3.3.2.3 The following text must be confirmed in the pad before the signing process

Use the property **The following text must be confirmed in the pad before the signing process** to require specific text to be confirmed on the signature pad before the signing process. The option **Use global setting** means that the [settings The following text must be confirmed in the pad before the signing process](#) from the global signature field settings are used and not signature field-specific ones. Alternatively, you can use the options **Do not use** or **Use individual text**. The latter offers the same setting options as the global signature field settings. You can also select the option **Use custom pad display**. This activates the **Configure** button which takes you to the configuration dialog. The default setting is 'Use global setting'.



In the configuration dialog for the individual pad display, you can insert any text or use placeholders in the input box, to be later displayed as confirmation text on the pad.

The **Image file** setting allows you to select a graphic as the background for the confirmation text. The common formats **.bmp**, **.jpg**, **.gif** and **.png** can be used. This option is enabled by default.



*Please use the suitable size of graphic for the signature pad to ensure optimal viewing. Furthermore, the height 52 px for the button bar has to be subtracted from the size of the graphic so the optimum size for the Omega is 640x428 px, the Gamma 800x428 px and the Delta 1280x748 px.*

Use the **Font** setting to define the font for the text. You can choose from various fonts. The text is immediately displayed with correct formatting in accordance with the selected font. The default setting is 'Arial'.

**Font size** allows you to define the size of the text. You can choose between fixed font sizes between **8** and **72**. The text is immediately displayed with correct formatting in accordance with the selected font size. The default setting is 12.

You can also specify the **Font color** of the text. You can choose from various colours. The default setting is 'Black'.

In the **Scale dialog for** list box, you have the possibility to change the dialog for the signature pad to be used. Here you can choose between **signotec Gamma**, **signotec Omega** or **signotec Delta**. The display will be adjusted according to the resolution of the respective signature pad. The default setting is 'signotec Gamma'.

With the **Show grid (only in this editor)** setting, a grid is shown over the dialog to facilitate better alignment of the entries. The grid is shown in this configuration dialog only (not in the preview on the PC or in the signature pad itself). This option is disabled by default.

To simulate the display on the pad, you can use the **Preview** button. In the configuration dialog, an image will be shown where the display is shown 1:1 (replaced placeholders, font size, line spacing and so on) as it would appear later in the signature pad. By clicking the image, you can exit the preview and return to the configuration dialog.

### 3.3.2.4 Display following text during signature capture

Use the property **Display following text during signature capture** if you want the signature pad to show specific text during the signing process. The option **Use global setting** means that the [settings Display following text during signature capture](#) from the global signature field settings are used and not signature field-specific ones. Alternatively, you can use the options **Do not use** or **Use individual text**. The latter offers the same setting options as the global signature field settings. The option **Use field name** is also available, which shows the name of the signature field on the signature pad at the top of the display. You can also select the option **Use custom pad display**. This activates the button **Configure**, which takes you to the configuration dialog. The last variant is ignored if the interactive signing mode is used. The default setting is 'Use global setting'.

All settings and options in the configuration dialog for the individual pad display are identical to the [settings](#) in **The following text may be confirmed before the signing process** for the individual pad display of the confirmation text.

### 3.3.2.5 Condition

This setting can be used to link the configured signature field to a particular condition, which must apply in order for the signature field to be generated.

First, you can configure the **Type** of condition to be checked. Here, you have a choice between **Text**, **Number** and **Age**. The default setting is 'Text'.

Use the **Reference** setting to select a placeholder to be used as reference for the comparison. The placeholder must, of course, be configured beforehand in the corresponding tab, so that a value is read out that can be used for the check. You can find further information [here](#). The default setting is 'Placeholder 1'.

The **Comparison** setting defines how the reference (placeholder) is to be compared with the value. Here, you have a choice between **Greater than**, **Greater than or equal**, **Equal**, **Less than or equal** or **Less than**. The default setting is 'Equal'.

Lastly, you enter the **Value** that the reference (placeholder) is to be checked against. If you chose 'Number' or 'Age' as the 'Type', you can only enter a number here; no other entries are permissible. This causes the input field to be shown with a red outline and the **OK** button will remain disabled until a permissible input is entered. If the 'Text' type was chosen, any desired entry is possible.

If we assume, for example, that we want to check an age that is less than 30, the configuration would have to be as follows so that the signature field is either created or not created on the basis of this condition. **Age** must be selected as type and we select **Placeholder 1** as the reference which is used to read out the value **12.11.1988**. If today's date is **30.07.2019**, the condition would not apply, as the age is not less than 30. The signature field would therefore not be created. But if today's date were **30.07.2018**, the signature field would be created, as the condition then does apply. The age would be 29 and therefore less than 30.

### 3.3.2.6 Overwrite configuration

With the **Mode for confirmation of signatures** setting, you can specify where the signature must be confirmed for the relevant signature field. The option **Use configured setting** means that the [setting Mode for confirmation of signatures](#) is used from the configuration and is not signature field-specific. Alternatively, you have the same options available here as in the settings for the signing process. The default setting is 'Use configured setting'.

### 3.3.2.7 Configure position

You can use this button to configure the position of the signature field, which was explained [here](#).

### 3.3.2.8 Use 'Content Signing'

Clicking this button causes a new dialog to be displayed where the corresponding settings can be made. You can find further information on the topic of content signing [here](#).

#### 3.3.2.8.1 General settings

You can use the **Sign the latest version of the document** check box to specify which version of the document the signature is to relate to. If the check box is enabled, the latest version of the document (in other words, the document with all signatures captured to date) is signed. This corresponds to the behaviour when signing with Adobe DigSig. If the option is disabled, the original document is always signed, i.e. without any previous signatures. This setting has no effect on the validity of the individual signatures. At the end of the process, you still obtain just one document containing all the captured signatures.

If, for example, the option is activated and **Mr Hilker** signs a document of suitable size for the display resolution of the signature pad, the first signature is then visible for the next signer, **Mr Bartsch**. But if the option is deactivated, **Mr Bartsch** would not be able to see the signature of **Mr Hilker** when signing.

If you are signing a document whose size does not match the display resolution of the signature pad, or in other words, if a document hash is used, the check box will affect when a new document hash is generated. The check box is irrelevant for the first signature field, since a new document hash is always generated for the first signature field. If the



check box is disabled for all further fields, there is just this one document hash, since all the following signatures continually relate to the same original document (which always has the same hash). If the check box is enabled for all following signature fields, in other words, each signature that follows relates to the latest version of the document, a new hash is generated before every signature. Any combinations are possible. Please keep in mind the interdependence with the [setting \*Print the document when the hash value changes\*](#) in the configuration.










### 3.3.2.8.2 Overwrite configuration

Furthermore, you can enter texts for the display that differ from those entered for the general configuration. This means that the signature-field-specific texts defined here are used instead of the settings for *Heading*, *Running text*, *Bottom left* and *Bottom right* configured under 'signotec Content Signing'.

### 3.3.2.9 Configure signature field groups...

Signature fields can be assigned to signature field groups, which you configure using the [Configure signature field groups...](#) button. In this case the order of the signatures is based on the groups rather than on the order of the signature fields.

After you have clicked the button, a new window opens where you create the configuration. In the left window *Default group*, all signature fields are displayed that have been configured but not yet assigned to a group. Under *Custom groups*, you can see all signature field groups that have been created for this document type. After selecting a group, all signature fields that are assigned to this group are displayed in the right-hand window under *Assigned fields*. No signature field groups are defined by default.

-  **Assign signature field to a group**
-  **Remove signature field from a group (back to default group)**
-  **Move the order of the group up one position**
-  **Move the order of the group down one position**
-  **Create new signature field group**
-  **Edit selected signature field group (change name of the group)**
-  **Delete selected signature field group (assigned signature fields back to default group)**
-  **Move the order of the signature field one position up within the group**
-  **Move the order of the signature field one position down within the group**

If a document of this document type is now opened and the signature process is started, you will see in the interactive signing mode only the signature fields of the first signature field group in read mode, and will only be able to sign these signature fields. In the normal signing mode there is no display of the signature fields in the signature pad itself. Once all signature fields of this group have been processed (signed or skipped), and if a further group is defined, a prompt will be displayed on the PC asking you how to proceed. The name of the group you are currently in and of the one that will follow next are displayed under *Current group* and *Next group*. Use the button *Reading mode* to switch to the corresponding mode in the interactive signing mode and see only the signature fields of the corresponding group. By clicking *Sign*, you can start the signature process for the next signature field group; clicking *Exit* will end the entire signature process and close the connection to the signature pad.

### 3.3.3 Save signatures as images

You can optionally save the captured signatures as graphics. If you enable and configure this setting, it applies to all signature fields of this document type. This option is disabled by default.

First, you can use **File name** to define the name of the graphic. By default, the placeholder %sigFieldName% is stored here, which stands for the name of the signature field. You can define your own text here and/or use placeholders.

Using **Store signature images in the archive folder**, you can specify whether the graphics are saved directly to the directory where the archived document is also saved. This is the directory from the [setting Archive folder](#). Alternatively, you can set a different storage path under **Folder for signature images**. The default here is %USERPROFILE%\Documents. Use the button with three dots to select a directory where the images are to be saved. To do so, you can use **Add a subfolder** to define whether a subfolder should be created in the target directory, the name of which can be freely selectable text and/or contain placeholders. By default, the placeholder %dateFileName% is stored here, which stands for the date, for example **2019-12-11**. This option is disabled by default.

If an external program is to be started after the graphic has been saved, this can be activated with **Launch application**. Use the button with the three dots to select the application to be called up. Only executable applications (\*.exe) can be selected. The **Application parameters** field can be used to transfer specific parameters to the application that is to be called up. These parameters must be placed in quotation marks and the individual parameters must be clearly separated from one another. By default, the placeholder %sigImage% is stored here, which stands for the path to the file. You can use this field to pass any other values to the external application, depending on what is required. This option is disabled by default.

If, for example, the graphic of the signature is to be saved after the signature has been captured and opened in the browser in addition to the visual signature check, the browser must be stored as a path and the graphic as a parameter, e.g. **C:\Program Files (x86)\Google\Chrome\Application\chrome.exe** and **%sigImage%**.

Finally, if the [setting Use 'signotec Content Signing'](#) is enabled, you can use **Save signed image instead of signature image (only 'signotec Content Signing')** to save the signed image rather than the signature image. The complete display on the pad is saved as a graphic, not only the signature graphic itself. This option is disabled by default.

### 3.3.4 Save biometric data to files

You can optionally save the biometric data (SignData) for your captured signatures in SDB format, which can then be analysed using the application eSig-Analyze produced by signotec GmbH, for example. If you enable and configure this setting, it applies to all signature fields of this document type. This option is disabled by default.



*This is a special function for saving the biometric data additionally and separately. Regardless of this setting, the biometric data is always stored in the document in encrypted form.*

First, you can use **File name** to define the name of the biometric data. By default, the placeholder %sigFieldName% is stored here, which stands for the name of the signature field. You can define your own text here and/or use placeholders.

Using **Store biometric data files in the archive folder**, you can specify whether the biometric data is saved directly to the directory where the archived document is also saved. This is the directory from the [setting Archive folder](#). Alternatively, you can set a different storage path under **Folder for biometric data files**. The default here is %USERPROFILE%\Documents. Use the button with three dots to select a directory where the biometric data is to be saved. To do so, you can use **Add a subfolder** to define whether a subfolder should be created in the target directory, the name of which can be freely selectable text and/or contain placeholders. By default, the placeholder %dateFileName% is stored here, which stands for the date, e.g. **2019-12-11**. This option is disabled by default.

If an external program is to be started after the biometric data has been saved, this can be activated with **Launch application**. Use the button with the three dots to select the application to be called up. Only executable applications (**\*.exe**) can be selected. The **Application parameters** field can be used to transfer specific parameters to the application that is to be called up. These parameters must be placed in quotation marks and the individual parameters must be clearly separated from one another. By default, the placeholder %bioFile% is stored here, which stands for the path to the file. You can use this field to pass any other values to the external application, depending on what is required. This option is disabled by default.



*If the biometric data is to be encrypted in the signature pad (**setting Certificate settings**), signoSign/2 can also only store these as an SDB file in encrypted form. You will need the private key to be able to process the data. The encrypted SDB files cannot be processed by the eSig-Analyze program, for example.*

## 3.4 Defining placeholders

### 3.4.1 Defining placeholders

signoSign/2 makes it possible to read out information from a document in order to use it in many different places. This information is read out via so-called placeholders. For example, you can use a placeholder to read an **invoice number** from the document and use this as the name of the archive file.

First, you can use **Number of placeholders** to define how many placeholders should be visually available in the application, which you can configure later. You can choose between 0 and 30 placeholders. The default setting is '10'.



**Edit placeholder**



**Delete placeholder**

If the button for editing a placeholder is disabled, no template file is stored for this document type (**setting Template file**), which would have to be located in the **signoSign2\_DocTypeTemplates.zip**.

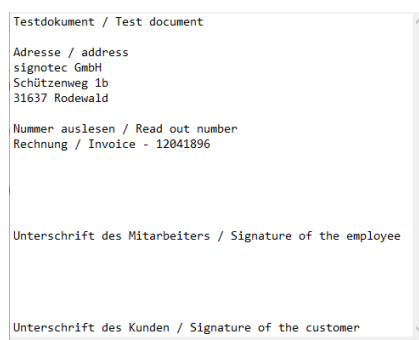
Otherwise, clicking the button opens a new window for configuring the placeholder. On the left, there is a view of the document and on the right, the text that the document contains. If no text is displayed there, your document does not contain any readable text and it cannot be used for the configuration of a placeholder.

#### 3.4.1.1 Configure placeholder

All settings for reading a placeholder can be made here.

First of all, you can use **Type** to choose between six options for declaring a variable. Choose **Start and end term**, **Start term and end of line**, **Fixed number of characters from a start term**, **Form field**, **XMP** or **bar code**.

The following pages use a sample document to describe when it is best to use which of the first three methods to read out the information. This document has the following content.



Once you have selected the type, you can use **Placeholder name** to define a name for this placeholder. This makes it easier to see which placeholder is used to read which information if several placeholders are defined later on. By default, no entry is stored, but once a search term is defined, it is stored as a placeholder name and can naturally be edited.

You can then select **Extraction mode**. The variants **Physical**, **Raw** or **Default** are available. This causes the text content of the document to be prepared and displayed differently during extraction. This can be helpful when the placeholders are being configured, as certain information is easier or harder to read depending on the extraction mode. The default setting is 'Physical'.

Testdokument / Test document Adresse / address signotec GmbH Schützenweg 1b 31637 Rodewald Nummer auslesen / Read out number Rechnung / Invoice - 12041896 Unterschrift des Mitarbeiters / Signature of the employee Unterschrift des Kunden / Signature of the customer	Testdokument / Test document Adresse / address signotec GmbH Schützenweg 1b 31637 Rodewald Nummer auslesen / Read out number Rechnung / Invoice - 12041896 Unterschrift des Mitarbeiters / Signature of the employee Unterschrift des Kunden / Signature of the customer	Testdokument / Test document Adresse / address signotec Gm Unterschrift des Mitarbeiters / Signature of the employee Unterschrift des Kunden / Signature of the customer
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**Physical mode**

**Raw mode**

**Default mode**

Once the appropriate extraction mode has been selected, the readout of the information can be configured according to the defined type.

To read out the **number of the invoice**, we will use the type **Start and end term** in this description. To read out the information, you will need fixed terms that do not change both directly before and directly after the information with this type. All text between these two terms is read and used for the placeholder. In our example document, the variable **invoice number** comes after the fixed term **Invoice -** and before the fixed term **Signature of the employee**. Accordingly, mark the term **Invoice -** so that it is stored with the **Search term** or enter it manually using the keyboard and search for it using the relevant button with the magnifying glass icon. Now define the **End characters** by selecting the term **Signature of the employee** and entering it there or entering it manually and searching for it. You can use **Occurrence** to specify which occurrence of the corresponding term should be used if it occurs more than once in the document. This cannot be edited manually; you will need use the button with the magnifying glass icon to search for it. If you have configured everything correctly, the placeholder information that has been read should be displayed under **Preview**, which in this case would be **12041896**.

To read the **number of the invoice**, we will use the type **Start term and end of line** in this description. To read out the information, for this type you will need a fixed term that does not change before the information and nothing else on the same line after the information. All text after the start term is read out and used for the placeholder. In our example document, the variable **invoice number** comes after the fixed term **Invoice -** and nothing comes after it. Accordingly, mark the term **Invoice -** so that it is stored with the **Search term** or enter it manually using the keyboard and search for it using the relevant button with the magnifying glass icon. You can use **Occurrence** to specify which occurrence of the corresponding term should be used if it occurs more than once in the document. This cannot be edited manually; you will need use the button with the magnifying glass icon to search for it. You can use **Skip lines** to specify whether lines should be skipped during readout and thus have one of the following lines read out first as information. The default setting is 0. Finally, you can use **Reverse Reading Direction** to specify whether to read to the left instead of the right of the search term. This option is disabled by default. If you have configured everything correctly, the placeholder information that has been read should be displayed under **Preview**, which in this case would be **12041896**.

To read the *number of the invoice*, we will use the type **Fixed number of characters from a start term** in this description. To read out the information, for this type you will need a defined term that does not change before the information and the information itself must always have a fixed number of characters. In our example document, the variable *invoice number* comes after the fixed term *Invoice* - and the *invoice number* itself is always exactly **eight characters** long. Accordingly, mark the term *Invoice* - so that it is stored with the **Search term** or enter it manually using the keyboard and search for it using the relevant button with the magnifying glass icon. You can use **Occurrence** to specify which occurrence of the corresponding term should be used if it occurs more than once in the document. This cannot be edited manually; you will need use the button with the magnifying glass icon to search for it. With **Number of characters**, you can define the length in characters of the information which is to be read out. The default setting is 0. Finally, you can use **Reverse Reading Direction** to specify whether to read to the left instead of the right of the search term. This option is disabled by default. If you have configured everything correctly, the placeholder information that has been read should be displayed under **Preview**, which in this case would be **12041896**.

If the information cannot be read out using one of the three types mentioned above, it is advisable to change the extraction mode as described above in order to display the text content in a different way and thus potentially access the information.

The fourth option for using a placeholder to read out information is the type **Form field**. The document type template must contain Adobe-compliant form fields if the content is to be read out from these fields. Text fields, dropdown lists and list boxes are supported. As before, the **Placeholder name** must be defined first. This makes it easier to see which placeholder is used to read which information if several placeholders are defined later on. No entry is saved by default. The **Name of form field** drop-down list shows all of the document's form fields. If the drop-down list is empty, the template file does not contain any form fields. Once you have selected a field on the basis of its name, it is shown highlighted in yellow in the document view. If the form field already contains an entry, the information that is read out is displayed under **Preview**.



*When configuring placeholders on the basis of form fields, we recommend that you always use a document type template with already filled values, to be able to check the correctness of the settings/selection in the preview.*

The fifth option for using a placeholder to read out information is the type **XMP**. Here, you can use the XMP metadata from the document to fill a placeholder. This metadata are generated when the document is created and they contain information that describes the document, such as the title, creation date, creator, etc. As before, the **Placeholder name** must be defined first. This makes it easier to see which placeholder is used to read which information if several placeholders are defined later on. No entry is saved by default. The **XMP Namespace** drop-down list shows all of the document's metadata namespaces. Select a namespace in order to select an element of this namespace under **XMP Element**. Under **Preview** you can see the corresponding information for the XMP element that is read from the document.

Your document could contain the following XMP metadata, for example:

```

...
<rdf:Description                                rdf:about=""
xmlns:photoshop=http://ns.adobe.com/photoshop/1.0/>
<photoshop:AuthorsPosition>XMP                Testdatei      -          Test
file</photoshop:AuthorsPosition>
<photoshop:CaptionWriter>Ferenc Hilker</photoshop:CaptionWriter>
</rdf:Description>
...

```



If you now want to read out the information Ferenc Hilker, you would have to select the XMP namespace <http://ns.adobe.com/photoshop/1.0/> and then the XMP element *CaptionWriter*.

The last option for using a placeholder to read out information is the type **Barcode**. As in the previous paragraphs, the first thing you need to do is specify the **Placeholder name**. This makes it easier to see which placeholder is used to read which information if several placeholders are defined later on. No entry is saved by default. You should only define all the following settings if you have all the information that is relevant for the barcode. Otherwise, leave the settings set to the default values, which will make signoSign/2 try to determine the barcode itself. This naturally takes more time than if the correct settings are already stored. You can use the **Scan direction** to specify the orientation of the barcode within the document. Different variants are available. The option 'All' is selected by default. The next setting **Barcode type** determines the stored type. The following barcodes are supported and can be selected: **Australia Post, Codabar, Code 11, Code 128, Code 32, Code 39, Code 93, Data Matrix, EAN-13, EAN-8, Interleaved 2 of 5, Intelligent Mail, ITF-14, Micro QR Code, Patch, PDF417, Planet, 2-digit supplementals, 5-digit supplementals, PostNet, QR Code, Royal Mail, RSS-14, RSS Limited, TelePen, UPC-A or UPC-E**. The option 'All' is selected by default. You can use **Page** to inform signoSign/2 which page the barcode is located on. You can choose between **Individual pages of the document** and **All**. The default setting is 1. If the document has two pages, for example, you can choose options **1, 2** and **All**. The last thing to define is the **Resolution**; you can choose between **72 DPI, 100 DPI, 150 DPI, 200 DPI, 250 DPI** and **300 DPI**. The default setting is 72 DPI.

If everything is configured correctly, you should be able to select the corresponding barcode and its content, which is read as information, from the **Barcode** drop-down list. If nothing is stored here, your document either does not have a compatible barcode or the settings made do not correspond to the barcode in the document. You can gradually adjust the settings until the desired barcode is available for selection. We recommend the following procedure:

- 1. Define page. This limits the search to a specific page instead of the entire document being searched.*
- 2. Define resolution. Set the DPI one value higher until the barcode is found. It can be found at different resolutions. The following applies: The greater the resolution, the larger the image size and the slower the search or read-out process.*
- 3. Define barcode type. Only one type can be the appropriate one. As before, the search takes longer if all types need to be checked than if the relevant type is specified.*
- 4. Define scan direction. As before, you need to keep checking until you find the correct orientation, as it takes considerably longer to check in all scan directions.*

If you know the barcode's settings, you can, of course, select them directly without trying them out.

The following example corresponds to these settings.



*Type: Barcode*  
*Placeholder name: Website*  
*Scan direction: Top to bottom*  
*Barcode type: QR Code*  
*Page: 1*  
*Resolution: 72 DPI*  
*Barcode: <http://www.signotec.com>*



The **Split barcode** setting allows you to read out a particular part of a barcode if the barcode contains various pieces of information. This activates the input fields **Delimiter** and **Occurrence**.

The following example shows the information we read out from the barcode. This information consists of the country code, company name, employee and date. The individual information items are separated by colons.

*DE:signotec GmbH:Ferenc Hilker:070818*

If we want to read out a certain part of this value, for example *employee Ferenc Hilker*, we must enter **:** under **Delimiter** and **3** under **Occurrence**. The 'Delimiter' field is used to enter the sign that separates the individual information of the value. 'Occurrence' is used to define which information is to be read out from the value.

The information that is read out is displayed under **Preview**. In this case, this would be *Ferenc Hilker*.

### 3.4.1.2 Options

Various options affecting the read-out values can be configured for the configured placeholders.

You can use the **Remove leading zeros** setting to remove all unwanted leading zeros from the read-out value. If, for example, the value *0012041896* (an account number) is read out, the two leading zeros can be removed using this setting. Only the value *12041896* is then displayed in under 'Preview'.

With **Remove non-numeric characters**, you can remove all characters that are not a number from the read-out value. If, for example, the value *17.10.2017* (a date) is read out, the full stops can be removed using this setting. Only the value *17102017* is then displayed in under 'Preview'.

The effect of the **Remove blanks** setting is to remove all blanks contained in the read-out value. If, for example, the value *DE96 2505 0180 0012 0418 96* (an IBAN) is read out, the blanks can be removed using this setting. Only the value *DE96250501800012041896* is then displayed under 'Preview'.

Alternatively, the search term can also be a regular expression. In this case, you need to enable **Search terms are regular expressions**. Example: this option is useful if only the account number (the last ten numbers) is to be read out from the value *DE96 2505 0180 0012 0418 96* (an IBAN). As the value in front of the account number is variable, a regular expression can be used. *DE\d{2}[ ]\d{4}[ ]\d{4}[ ]* would have to be defined as the search term. If 'Start term and end of line' is selected as the type, then *0012 0418 96* would be read out as the value. If we enable the 'Remove leading zeros' and 'Remove blanks' settings, we get the account number *12041896*.

Further information on using regular expressions can be found on [here](#).

## 3.5 E-mail settings

### 3.5.1 Default values for messages

Here, you can configure the settings for sending e-mails. First, use **To:** to specify the recipient. You can enter a fixed e-mail address or use a placeholder, if this placeholder reads out an e-mail address. Alternatively, leave this field empty and enter the e-mail address manually before sending. Exactly the same options are available for **Copy to:** (CC) and **Blind copy to:** (BCC). A fixed subject can also be defined for the **Subject** and/or placeholders can be used.

Under **Message**, enter the text you want to send. As well as using placeholders, you can alternatively use the option **Message from file** here. This deactivates the input field and a text file (*\*.txt*) needs to be configured containing the text for the e-mail. This text file is configured by clicking the button with the three dots. Both variants offer the possibility to

insert a hyperlink in the e-mail by specifying an "[url]" tag. The desired hyperlink must be defined between the opening "[url]" tag and the closing "[/url]" tag. For example `[url]https://www.signotec.com[/url]` so that a link to [www.signotec.com](https://www.signotec.com) is inserted in the e-mail. The default setting is 'Message'.

Use the **Attach document to the e-mail** option to specify whether the document should be sent as an e-mail attachment. This option is enabled by default.

The last setting determines whether the e-mail is sent directly or whether an e-mail window opens where manual changes can be made. This includes To, Copy to, Blind copy to, Subject and Message. This works even for sending e-mails via SMTP. If Outlook is used, the e-mail window will open, where you can make other settings or changes. This is determined by the setting **Send e-mails directly (no e-mail window)**. This option is disabled by default.



*If you use Microsoft Outlook to send e-mails, you will receive a query or warning if the e-mail is to be sent directly as signoSign/2 attempts to send a message via Outlook.*

## 3.6 Archiving settings

### 3.6.1 Configure Archive Service

This section describes the settings for archiving. For **Archive Service**, you can select between the **signoSign/2 File Archiver**, **signoSign/2 Upload Archiver** and any installed archive plug-ins. The variant 'signoSign/2 File Archiver' is suitable if you want to save the document locally or in the network with path and optional user password identification. If you want to send the document to a website / web server, the signoSign/2 Upload Archiver variant would be the correct choice. The default setting is signoSign/2 File Archiver.

If **signoSign/2 File Archiver** is selected, there are five settings which are described below.

By selecting the **Overwrite the source file** option, the opened file is overwritten. If you have printed a document using the signotec PDF Creator, the temporary PDF document generated by the virtual printer in the **%TEMP%** directory is overwritten during archiving. If a PDF document has been opened directly, it will be overwritten in the source directory from which it was opened during archiving. This disables the settings for **Name of the archive file**, **Extension of the archive file**, **Archive folder**, **Subfolder** and **Delete the source file after the document is archived**, as they are no longer relevant in this constellation. This option is disabled by default.

The **Name of the archive file** defines the file name under which the document will be stored. Any name can be chosen, and the placeholders can also be used. When you specify the name, ensure that it is unique to avoid any problems during archiving. If, for example, the document is to be saved only with the name **Invoice**, this would cause problems during the next archiving, as this, too, would be saved under the name **Invoice**, but the target directory already contains a document called **Invoice** from the first procedure. Either you overwrite the file and the first document will be lost or you cancel the process, do not overwrite the file but fail to archive the second document. In this case, a date and time stamp could be added to the file name, for example, which would make each file name unique. **Invoice\_%dateFileName%\_%timeFileNameShort%** would be defined under 'Name of the archive file' to have the document saved as **Invoice\_2019-11-12\_12.04.96**. The parameter **%orgFileName%** is saved by default.

**Extension of the archive file** allows you to specify the file extension, which will be used when archiving the document. Any ending can be chosen, but we recommend using **.pdf** or **.sig**. The extension can be specified with or without a full stop. The default setting is 'pdf'.

The next field, **Archive folder**, allows you to specify the folder where the document is to be archived. You can configure the archive folder by clicking the corresponding button with the three dots, which will open a new window. As there are two options for archiving, these two options are explained in the following two sections. The default is %USERPROFILE%\Documents.

### 3.6.1.1 Access with logged in user account (Default)

You can use **Directory** to specify the storage location where the document is to be saved. This variant uses the logged-in Windows user, so the user must have access to the target directory. You can click the button with the three dots to select the directory or edit it manually in the input field. By default, the setting is activated and stored under %USERPROFILE%\Documents.

### 3.6.1.2 Access with different user account

Instead of using the logged-in Windows user for archiving, you can define a user account here that is to be used for archiving. This is useful if the normal user does not have access to the target directory of the archived documents. To do this, activate the option and then define the settings **Directory** (via UNC path), **User name**, **Password** and **Domain**. When you click OK to confirm the configuration, a check for accessibility is made based on these settings. This may take a short moment and if an error occurs you will be notified of this in a message. This option is disabled by default and nothing is saved.

The last setting for signoSign/2 File Archiver is **Add a subfolder**. Here you can specify whether a subfolder should be added in the target directory in which to store the documents. Any name can be chosen for this subfolder and/or placeholders can be used. You can also use the backslash to define further subfolders and thus map an entire directory structure. If this folder doesn't exist, signoSign/2 will create it during archiving. This option is disabled by default and %dateFileName% is saved.

If **signoSign/2 Upload Archiver** is selected, there are three settings which are described below.

You can use the setting **Upload URL** to define the URL (web server) that will receive the document. We use a standardised **Multipart upload** via **http** for the upload and the file is transferred in the field name **file** within the **Content disposition**. The URL can also consist of placeholders. Nothing has been stored here by default.

As before, the **Name of the archive file** and **Extension of the archive file** define the name of the document during archiving and its file extension. You can find more detailed information and what issues you need to be aware of under the [settings Configure Archive Service](#) for **signoSign/2 File Archiver**.

## 3.6.2 General settings

If you **Only allow archiving when all signature fields have been signed**, the document will only be archived once all signature fields have been signed. If archiving is attempted beforehand, it will fail and you will be informed of this. The message reads *'The document [...] does not contain the required signatures. No archiving could therefore take place. Please insert the relevant signatures and try again.'* This option is disabled by default.

The setting **Optional fields may remain empty** is only active if the setting 'Only allow archiving when all signature fields have been signed' has been enabled. During archiving, this option checks whether all the mandatory fields in the document have been signed; all other optional signature fields can remain unsigned.

Alternatively, the option **Only allow archiving with minimum number of signatures** can be activated. This deactivates the setting 'Only allow archiving when all signature fields have been signed'. This variant checks whether the document contains the defined number of signatures, regardless of whether they are mandatory or optional fields, and only then

allows archiving. Otherwise you will get the same message as mentioned above. This option is disabled by default.

### 3.6.3 Additional actions

Select **Automatically print when archiving** to specify whether the document should be automatically printed after it has been archived. In accordance with how you defined the [setting Default printer](#), the printing process is now carried out. This option is disabled by default.

Furthermore, you can select **Automatically send by e-mail when archiving** to send the document automatically by e-mail after it has been archived. In accordance with how you defined the [settings Default values for messages](#), the sending of the e-mail is now carried out. This option is disabled by default.

If you activate the **Delete the source file after the document is archived** option, the source file to be signed will be deleted after the signed document has been archived. The temporary, unsigned PDF files created by our signotec PDF Creator virtual printer are saved in the **%TEMP%** directory by default and then deleted by this setting. If a PDF file is opened without using our printer, the opened file will be deleted if the document has been archived. Please ensure that this setting is deactivated when using PDF templates that are used repeatedly. This option is enabled by default.

In addition, you can use **Launch application:** to define an application that the document should be sent to after it has been archived successfully. This works even if the [setting Access with different user account](#) is used for archiving. Use the corresponding button with the three dots to define the application to be called up (**\*.exe**). For example, if you installed **Adobe Acrobat Reader** and choose this as the application, the document will open in **Adobe Acrobat Reader** after archiving.

The **Application parameters** setting is only active if the 'Launch application' setting has been enabled. This option allows you to define parameters that are sent to the application being called up. Always enter the parameters in quotation marks if they contain paths or names with spaces. If you are entering several parameters, you can use spaces to separate them. By default, the '%archiveFile%' is stored here, which contains the path of the signed document.

## 3.7 Settings for index file

### 3.7.1 Generate index file

This option allows you to configure the content for an index file for the document being archived. Please bear in mind the configuration of the main index file which is described [here](#). This option is disabled by default.

First, you can specify the **Name of the index file**. You can store any text of your choice and/or use placeholders. By default, the %archiveName% is stored here, which contains the file name of the archived document.

In the **Extension of the index file** field, specify the file format to be used for the index file. The extension can be specified with or without a full stop. The default setting here is 'xml'.

With the next item, **Own path for index file:**, you can define a separate directory for storing the index file. If this option is disabled, the index file will be stored in the same directory as the signed document. You can click the button with the three dots to select the directory or edit it manually in the input field. This option is disabled by default.

The last setting **Treat content as XML** checks the index file's content for a valid XML structure. For example, only one basic element is allowed, the start tag must match the end tag, etc. In addition, the specified coding will be checked and used. If this cannot be determined, UTF-8 will be used. The check covers not only the content of the document type-specific part but also the content of the main index file from the configuration. The

check is performed when you click buttons **OK** and **Apply** and a message is displayed if any errors are found. If multiple errors are found, detailed information is always displayed for the first error. If you click **Yes** to confirm the message, the changes are accepted and saved. If you click **No**, no changes are made to the content but it is not saved. This option is disabled by default.

The **Content of the index file** can be established as desired. It is up to you whether you enter text and/or use existing placeholders. This index file can be used, for example, to enable the signed document to be transferred and assigned to archive systems. Nothing has been stored here by default.

## 3.8 Settings for resubmission

### 3.8.1 General settings

All settings can only be configured if the [setting Use resubmission](#) has been enabled and administered. Resubmission allows you to store documents temporarily in order to access them again at a later time.

First of all, with **Use resubmission** you can select whether documents of this document type should be stored in resubmission at all. If the option is disabled, the function will not be available in signoSign/2. This option is enabled by default.

Under **Name of document**, you can specify the file name that should be used for storing the document in resubmission. The specification must be made without file format, for example `%orgFileName%` for the original file name rather than `%orgFileName%.pdf`. The default here is `%orgFileName%`.

By activating the setting **Delete source file after filing in resubmission**, the source file to be signed will be deleted after the document has been successfully saved in signoStorage. Please also note the information regarding source files in the [setting Delete the source file after the document is archived](#). This option is disabled by default.

With the **Close document after filing in resubmission** option selected, the document is closed in signoSign/2 as soon as it has been stored in resubmission. If the setting is disabled, the document is stored in signoStorage but remains open for further processing. This option is enabled by default.

With the function **Send e-mail after filing in resubmission** you can determine whether an e-mail is to be sent after successful saving in the resubmission. The [settings Default values for messages](#) are taken into account and used, with the exception of the [setting Attach document to the e-mail](#). The option is disabled by default.

### 3.8.2 Settings for signoStorage

These settings can only be configured if the [setting Storage location](#) has been set to signoStorage. If file system is stored there, these settings remain disabled and cannot be configured.

To make it easier to find documents in signoStorage, up to ten different user-defined index criteria can be sent as information. Click the relevant button to allocate a placeholder to the index criterion, or enter the relevant value directly into the entry field. For example, for **Index1**, the value `Date_%dateShort%` could be sent for `Date_26.04.2019`. Nothing has been stored here by default.

## 4 Operating signoSign/2

### 4.1 The menu bar

#### 4.1.1 File

##### **Open...**

This function allows you to open a file selection dialog that you can use to open a file in signoSign/2. The supported formats are **PDF files (\*.pdf, \*.sig)**, **Document stack for**



*signoSign/2 (\*.sml), XML Forms Data Format (\*.xpdf) and Compressed archives (\*.zip, \*.szp)*. Alternatively, you can use the key combination **Ctrl + O** to open the dialog.

### **Open from resubmission...**

This function enables you to open a document from resubmission for further processing.

### **Reload**

This function enables you reload the document that is currently open. Any changes that have been made, such as signatures or notes entered up to saving of the document are discarded and the status at the time of opening is displayed again.

### **Save**

This function allows you to save the document if a storage location has already been specified for the file. This is the case, for example, if the document was opened via the 'Open file' dialog, was created and sent by signotec PDF Creator or was transferred from Adobe Acrobat Reader by signotec Document Transfer. The file is then simply overwritten in the source directory. If no path for the storage location has been stored, e.g. if the document has been split, a 'Save file as' dialog will be displayed where you can define the file name and storage path. Alternatively, you can use the key combination **Ctrl + S**.

### **Save in resubmission**

This function allows you to save the document in resubmission in accordance with the [setting General settings](#)

### **Save as...**

This function allows you to save the document in any folder of your choice. A 'Save file as' dialog opens where you can define the file name and storage path.

### **Save all**

This function allows you to save all documents (one tab per document) that are open in signoSign/2 and have been changed. The files are then simply overwritten in the source directory (see 'Save'). Alternatively, you can use the key combination **Ctrl + Shift + S**.

### **Close**

This function allows you to close the current document (current tab). Alternatively, you can use the key combination **Ctrl + W**.

### **Close others**

This function allows you to close all other documents apart from the current document.

### **Close all**

This function allows you to close all documents that you have opened in signoSign/2.

### **Print...**

This function allows you to print the current document. A print dialog opens where you can to select the printer and adjust various settings. If you have configured one or more printers in the [setting Printer preselection](#), they are listed under this menu item. If you have configured a printer for this document type under the [setting Default printer](#), the document will be printed on this printer directly without a dialog. Alternatively, you can use the key combination **Ctrl + P**.

### **Display with Adobe Reader**

This function allows you to open the current document with all changes as a copy in Adobe Acrobat Reader (additional window). This option is available only if Adobe Acrobat Reader is installed.



### Send by e-mail

This function allows you to send the current document by e-mail. Depending on the [setting \*\*Send e-mails directly \(no e-mail window\)\*\*](#), either the e-mail window opens where changes can still be made to the e-mail, or the e-mail is sent directly. If the [setting \*\*Attach document to the e-mail\*\*](#) is enabled, the document is attached automatically.

### Exit

This function allows you to exit signoSign/2. Any open documents are closed and the [setting \*\*After closing the document\*\*](#) takes effect.

## 4.1.2 Edit

### Search text...

This function allows you to search for specific text in the current document. A new window opens where you can enter the **Search term**. Select the **Match case** option to make the search case-sensitive. Click **Search** to start the search. The first hits are highlighted in yellow in the document. Then you can perform additional searches (**Continue search**) within the document. Click **Close** to close the window. Alternatively, you can use the key combination **Ctrl + F**.

### Form mode

This function allows you to switch to form mode if the document contains Adobe-compliant form fields. If the document does not contain any form fields, the function is disabled. No form fields can be created with signoSign/2. The form fields are highlighted in colour (blue) if form mode is enabled. Mandatory fields are additionally outlined in red. You can fill out in the form fields by entry and selection. Clicking this button again or using another function (such as the [options \*\*Create notes\*\*](#) or **Start signing**) exits form mode and saves the changes you have made. While form mode is enabled, the signature fields are hidden.



*Once a signatory has been captured, the form fields can only be edited if the [setting \*\*Allow filling out of signed documents\*\*](#) is enabled. Otherwise, form mode is disabled for further changes. Processing is only possible if the form fields with the signature have not been locked ([setting \*\*Lock form fields\*\*](#)).*

### Create notes

This function allows you to insert a note at any point in the document. If the function has been selected, there is a tick next to the menu item, you can tell that this mode is active.

You can now use the mouse to draw a note field. A 'Create note' window opens where you can define a text and adjust the **Font**, **Font size** and **Background color**. All settings are enabled as soon as they have been selected, and are displayed in the text box accordingly. The text field is prefilled with the entry from the last note process. The default settings here are Arial, Automatic and Transparent.

You can also select an **Image file** instead of or in addition to the text using the corresponding button with the three dots. The image formats **.bmp**, **.jpg**, **.gif** and **.png** are supported. Alternatively, you can enter the path manually. The setting **Scale image to border** allows you to specify whether the image should be inserted in its original size (disabled) or scaled to the size of the drawn note field (enabled). This can cause graphics to appear squeezed or distorted, however. This option is disabled by default.

Click **OK** to insert the note and **Cancel** to close the window and discard the note. Disable this function to return to the normal mouse pointer and leave note mode.

Here, too, the hint from the [function \*\*Content to insert after opening the document\*\*](#) applies that the document loses PDF/A-1b conformity if images and/or transparent text are inserted. You will be informed by a warning if you select this option.

## Handwritten notes

This function allows you to insert a note at any point in the document using the mouse, touch or pen. If the function is selected, another toolbar appears, which is used for further control. Unlike the [function Create notes](#), no note field needs to be drawn at this point.



Use this button to select the pen. Afterwards you can create handwritten notes in one or more places in the document. The selected pen size and pen color are taken into account.



Use this button to select the marker. Afterwards you can make handwritten markers at one or more places in the document. The selected marker size and marker color are also taken into account here.



Use the button to select the rubber. Afterwards you can remove notes and markings in the document that have not yet been confirmed. To do this, you simply have to erase at the point where something is to be removed. The process always removes contiguous lines from one operation.



Use this button to confirm created notes and markings so that they are fixed in the document and cannot be removed. The mode for handwritten notes is then closed.



Use this button to exit the mode for handwritten notes. All created notes and marks that have not yet been confirmed are discarded.

If the pen or marker has been selected, the size and color of the note or marker to be inserted can be selected using the corresponding selection fields. This can be changed during creation without having to confirm the previous entries beforehand.

## Capture signature manually

This function allows you to place one or more signatures field at any point in the document. Depending on the [setting Only allow available signature fields to be signed](#), this function may be enabled or disabled. As is the case for notes, if there is a tick next to the menu item, you can tell that this mode is active. You can now define one or more signature fields by drawing them with the mouse. Please note that at this point the [setting Use static instead of virtual signature fields](#) from the document type is also used and, depending on the selection, the signature fields are inserted either permanently or temporarily. You can start the signature process by clicking on the corresponding button for all signature fields or by clicking directly on a signature field. If you disable this option, the normal mouse pointer appears again.

## Start signing

This function allows you to start the signing process, which runs through all signature fields in the stored sequence. Alternatively, you can use the **F5** key.

## Archive

This function allows you to archive the document in the configured directory. The document is then closed in signoSign/2. Alternatively, you can use the **F12** key.

## Append a scanned page...

This function allows you to scan in the document with the locally connected scanner and add it to the end of the document as a new page. Alternatively, you can use the **F4** key.

Once the scan is complete, the scanned document is opened in a new window as a preview. You can use the sliders **Brightness** and **Contrast** to change the value of the respective setting to then start the scanning procedure with **Scan again** to achieve a scan in better quality, if required. **Rotate** allows you to define whether the scanned document should be inserted with a rotation of **0°**, **90°**, **180°** or **270°**. The scan does not need to be repeated for this. Click **Cancel** to close the window and **OK** to add the scanned document to the end of the open document as a new page.

## Add pictures from a webcam...

This function allows you to capture images with your webcam and add them to the end of the document as a new page.

Once the image capture has started, a new window opens displaying a preview of the selected webcam view. You can use **Choose camera** to switch from one webcam to another, if several are connected. You can use the **Digital zoom** slider control to reduce the webcam zoom (minimum of 1x zoom) or increase it (up to 10x). Use the buttons **Capture first image** and **Capture second image** to capture the current view and display it as a preview under the corresponding button. Regardless of the opened document, the new page with the captured images is always inserted in DIN A4 portrait format. The first image is always inserted in the top half of the document and the second always in the lower half. Click **OK** to insert the images as a new page at the end of the document and **Cancel** to close the window and discard any captured images.

## Append another document...

This function allows you add images to the end of an unsigned document as a new page. An 'Open file...' dialog is opened where you can select a **.pdf** or **.sig** file and add it by clicking **Open**. Clicking **Cancel** closes this dialog without making any changes to the document.



*For the [functions](#) **Create notes**, **Append a scanned page.....**, **Add pictures from a webcam.....**, **Append another document.....** and **Rotate clockwise & counterclockwise**, the following applies: None of these options can be used with a document that has already been signed, as they represent an illegal change that would invalidate the signatures it contains.*

## Rotate clockwise

This function allows you to rotate the current document (all pages) 90° clockwise. It can be repeated indefinitely. You can use the [function](#) **Reload** to undo a rotation if the document has not been saved or archived.

## Rotate counterclockwise

This function allows you to rotate the current document (all pages) 90° counterclockwise. It can be repeated indefinitely. You can use the [function](#) **Reload** to undo a rotation if the document has not been saved or archived.

## 4.1.3 View

### Go to page...

This function allows you to skip to a specific page in the document. A new window opens where you can enter the page number. Click **OK** to go to the specified page. Click **Cancel** to close the dialog without skipping to a specific page. Alternatively, you can use the key combination **Ctrl + G**.

### First page

This function allows you to return to the first page of the open document. Alternatively, you can use the **Home** key.

### Previous page

This function allows you to return to the page before the current page of the open document. This means, for example, that if you are on **page 9** and click on this button, you will be taken to **page 8**. Alternatively, you can use the **Page Up** button.

## **Next page**

This function allows you to go to the next page in the open document. This means, for example, that if you are on *page 6* and click on this button, you will be taken to *page 7*. Alternatively, you can use the **Page Down** button.

## **Last page**

This function allows you to go to the last page of the opened document. Alternatively, you can use the **End** button.

## **Fit to page height**

This function allows you to adjust the current page view such that a whole page is displayed in the view. Alternatively, you can use the key combination **Ctrl + 0**.

## **Fit to page width**

This function allows you to adjust the current page view such that the entire width of the page is displayed in the view. The height of the document is not taken into account. Alternatively, you can use the key combination **Ctrl + 3**.

## **Reduce zoom**

This function allows you to zoom further out of the document. Every time you click this option, you zoom further away from the document and everything gets smaller. Alternatively, you can use the key combination **Ctrl + -**.

## **Enlarge zoom**

This function allows you to zoom further into the document. Every time you click this option, you zoom closer into the document and everything gets bigger. Alternatively, you can use the key combination **Ctrl + +**.

## **4.1.4 Tools**

### **PDF report...**

This function allows you to open the PDF report, providing information on the **Description**, **Fonts** and **Signature and form fields**. A new window opens with the corresponding tabs. You can navigate through these tabs and obtain this information at any time. Click **Close** to close the dialog again.

### **Open log view...**

This function allows you to open the log view in accordance with the [setting Type of logging](#). A new window opens containing the log file for the current date. You can use **Select log file** to change to the log for a previous date. Clicking the button **Copy to clipboard** copies the entire content, which can then be copied into an e-mail, for example.

### **Configuration...**

This function allows you call up the configuration settings of signoSign/2. A new window opens where you can make changes to the settings. Click **OK** to confirm these changes and **Cancel** to discard them and close the dialog. Alternatively, you can use the **F8** key. Unlike the other options, the **F8** key can still be used to call up the configuration even if the [function Configuration...](#) has been disabled.

### **Document types...**

This function allows you call up the document type administration of signoSign/2. A new window opens where you can make changes to the document types. Clicking **OK** and **Apply** confirms these changes, but only the OK button will also close the window. The **Cancel** button allows you to discard any changes you have made and closes the window. Alternatively, you can use the **F9** key. Unlike the other options, the **F9** key can still be used to call up the document type administration even if the [function Document types...](#) has been disabled.

## 4.1.5 Help

### About signotec signoSign/2...

This function allows you call up information about signoSign/2. A new window opens containing the **Setup version**, information about how to **Contact** signotec GmbH and **Licence information**. Expanding the option **Click here to display a list of the DLLs used** displays an exact list of all files used by signoSign/2 and their versions and any installed **plug-ins**.

### Open documentation

The function allows you to open the signoSign/2 User Guide in Adobe Acrobat Reader, provided this documentation has been included in the installation. Only the German or the English documentation is installed, depending on the operating system's system language. Adobe Acrobat Reader must also be installed. The link to the User Guide is located in the installation directory **... \signotec \signoSign2 \Dokumentation**, and the file itself is stored in **%PROGRAMDATA% \signotec \signoSign2**. The documentation for installation is a separate file, but it is also located in the installation directory.

### Video tutorials

This function allows you to open our YouTube channel, where you can find helpful video tutorials on how to use signoSign/2. The website is opened in a new browser window. Depending on the display language of the application, you will be directed to the German or English YouTube channel.

### Licensing...

This function allows you to license signoSign/2. A new window opens where you can view your currently used license under **Licence information**. The default setting here is a license for testing for 30 days. The **Contact** section provides the contact details of signotec GmbH. You can license signoSign/2 under **Update licence**. Select either a licence file (\*.lic) under **Use licence file** or insert the licensing key into the corresponding text box **Enter licence key**. Please request the license from [license@signotec.de](mailto:license@signotec.de). You can use **Paste from clipboard** to enter the license key if it is stored in the clipboard. If the license is valid, the application is licensed and you can click **Close** to exit the dialog.



*The license is only valid for the current version at the time of purchase. Later, newer versions are subject to a fee or you can conclude a software maintenance contract. Using an invalid license will result in your inability to run the software.*

### Remote maintenance...

The function allows you to open the remote maintenance tool TeamViewer, provided this tool was included in the installation. It makes it possible for signotec GmbH to connect to your computer via remote maintenance to help with questions or problems. You must click **Accept** to accept the disclaimer before starting remote maintenance. If you select **Reject**, remote maintenance cannot be performed. Please notify the support team of **your ID**. The **password** is a permanently stored password that is known to the employee. You can click **Cancel** to close the window again. For remote maintenance, please contact our hotline or use the [support form](#) on our website to open a ticket.

## 4.2 Status bar

The status bar is located at the bottom of the signoSign/2 and it displays important information for the displayed document. **Page** displays what page you are currently on, for example **Page: 6 / 9**. Double-click this information to call up the **function Go to page....** This function is only available if the document has more than one page, however. **Page format** shows the format of the first page of the document in millimetres, for example **210 x 297 mm** for a DIN A4 portrait document. The next item is **Signed signature fields**, which shows the number of signed signature fields out of all signature

fields in the entire document, e.g. *Signed signature fields: 0 / 3*, if none of the three signature fields have been signed. You can also use **On current page** to display how many signature fields on the current page have been signed, e.g. *On current page: 1 / 2*, if one of the two signature fields on the corresponding page has been signed. Last, you can see which **Document type** was identified in the check in document type administration or loaded as a transfer via SML, ZIP or SZP file. If no match could be found or no document type was transferred, *All other documents* is displayed here.

### 4.3 Parameter values

signoSign/2 can be started in conjunction with any number of parameters. Each of these parameters must include a path to a **.pdf**, **.sig**, **.sml**, **.xdf**, **.zip** or **.szp** file.

The following is an example of a potential call-up:

```
"C:\Program Files\signotec\signoSign2\signoSign2.exe"  
"C:\Documents\Test.pdf" "C:\Templates\New\Test2.sig"
```

This starts signoSign/2 and opens the files *Test.pdf* and *Test2.sig*. The order in which the documents are opened is not necessarily the same as the order of the parameters.

Alternatively, you can use the **OpenResubmission** parameter to open the resubmission in signoSign/2. If the **setting File system** is used for the resubmission, no information for filtering the displayed documents can be appended to the parameter. If, on the other hand, the **setting signoStorage** is used, the result list can be narrowed down by means of column name and value. Several values can be passed, the individual values must be separated by a "&". If the filter function is to be used, the complete parameter must be defined in inverted commas.

A call could look like this, for example:

```
"C:\Program Files\signotec\signoSign2\signoSign2.exe" OpenResubmission  
"C:\Program Files\signotec\signoSign2\signoSign2.exe"  
"OpenResubmission?ID=96&User=Ferenc Hilker"
```

It is not possible to include other parameters of information.



*It is not possible to use and pass the OpenResubmission and file parameters at the same time.*

### 4.4 Using SML files

SML files can be used to open one or more PDF documents with signoSign/2 and to include information for these documents such as document type and placeholders. To do this, the SML file must be opened with signoSign/2 and contain at least one reference to a document. The format and content of these files is based on an XML structure. If the document type is defined in the SML file, there is no need for signoSign/2 to perform the check based on identification terms. If the document type is not stored, the check for identification terms is performed as usual. In addition, predefined values for the placeholder can be defined in the SML file without them being read from the document by signoSign/2. This option is only considered for the first ten placeholders. All values in the SML file for the other placeholders (11 to 30) are ignored by signoSign/2. If placeholders are already configured in the document type, their values will be overridden by the values defined in the SML file. Placeholders that are not defined in the SML file will be determined by signoSign/2 in the usual way.



The following example explains the format of a SML file:

```
<?xml version="1.0" encoding="utf-8"?>
<signotec>
<Open>
....<File>C:\Document\Invoice.pdf</File>
....<File>C:\Document\Invoice2.pdf</File>
....<Values>
.....<DocType>Invoice</DocType>
.....<Variable1>€18.96</Variable1>
.....<Variable2>26.08.2019</Variable2>
.....<Variable3>Ferenc Hilker</Variable2>
....</Values>
..</Open>
..<Open>
....<File>C:\Document\DeliveryNote.pdf</File>
....<Values>
.....<DocType>Delivery</DocType>
.....<Variable1>L2019-H-001</Variable1>
.....<Variable2>27.08.2019</Variable2>
.....<Variable3>Rodewald</Variable2>
....</Values>
..</Open>
..<DeleteAfterOpen>True</DeleteAfterOpen>
</signotec>
```

**signotec** must be used as root element, in which any number of **Open** elements can be embedded. The **File** element can be used to define a document with name and path that are to be opened. An **Open** Element can contain any number of **File** elements. In the **Values** element, you can define the document type on the basis of the element **DocType** and the placeholders on the basis of elements **Variable1** to **Variable10**. For each **Open** element, only one **Values** element can be defined, and in this element the elements **DocType** and **VariableX** must only be defined once. The **DeleteAfterOpen** element can also be included. As long as it is set to **True**, the SML file will be deleted after the documents are opened.



*Note that the elements are case-sensitive.*

SML files cannot be used if the PDF documents they contain are to be temporarily stored in the file system or in resubmission ([setting Use resubmission](#)). SML files and their PDF documents can also not be used for the backup function ([setting Backup and restore incomplete processed documents](#)).

## 4.5 Use ZIP & SZP files

You can use ZIP or SZP files to transfer one or more PDF files to signoSign/2 as it opens. Furthermore, the document types and their complete settings can be specified for these documents, independent of the document type recognition within signoSign/2. In this case, a pair consisting of a PDF document and XML file must be included in the ZIP or SZP file. The names of these two files must be exactly the same, e.g. **Invoice.pdf** and **Invoice.xml**, to ensure that the document to be signed can be matched to the document type. The PDF document corresponds to the file that is to be signed in signoSign/2 and the XML file contains the document type and its settings. Several pairs of PDF and XML can be contained in the ZIP or SZP file, e.g. **Invoice.pdf**, **Quote.pdf**, **Invoice.xml** and **Quote.xml**. If the ZIP or SZP file only contains one PDF document without an XML file or if the name of the PDF document does not match the name of the XML file, the PDF document is opened and document type recognition on the basis of identification definitions

is started up and applied. The XML file (document type) must contain the structure of an exported document type.

The following is an example of the first lines of an XML file:

```
<?xml version="1.0" encoding="utf-8"?>
<DocumentType Version="1.0">
<GeneralSettings>
<ID>51d524d1-671d-4698-a499-78b3bb01877f</ID>
<Name>Invoice</Name>
<Description></Description>
<Version>1.0.0</Version>
<TemplateFile>C:\Document\Template-Invoice.pdf</TemplateFile>
<IsEnabled>True</IsEnabled>
...
```

All values (settings) of the document type not included in the XML file are ignored by signoSign/2 and therefore skipped. Please note that the [setting \*Delete the source file after the document is archived\*](#) in this case deletes the ZIP or SZP file. The ZIP or SZP file can be opened and processed by the 'Open file...' dialog, by being dragged and dropped into the main window, by URL schema from the web or as transfer parameter for the application (signoSign2.exe).

## 4.6 Use URL schema

You can start signoSign/2 from a web environment via URL and transfer documents with and without document types and their settings. The URL schema '[signosign2://](#)' is used for this, which is assigned to the application ([signoSign2.exe](#)) by the setup. The URL can contain parameters of the supported file formats [.pdf](#), [.sig](#), [.sml](#), [.xdf](#), [.zip](#) and [.szp](#). If several files are to be transferred in one URL, the key [docX](#) can be used. The first parameter [doc1=](#) contains the web or file URL, the second parameter is introduced with [&doc2=](#) and also contains a web or file URL. A third parameter would then be added with [&doc3=](#) (etc.).

The following is an example of a potential call-ups from a web application:

```
<a href="signoSign2://https://downloads.signotec.com/Support/Dokumente/DE/signoSign2/zertifika
t.pdf"> Certificate </a>
<a href="signoSign2://https://bit.ly/39WrTBL">Certificate</a>
<a href="signoSign2://doc1=https://bit.ly/39WrTBL&doc2=
https://bit.ly/2QmAzty"> Certificate DE + Certificate EN</a>
```

Please make sure that any prohibited URL characters in the file name or path are encoded accordingly. If the file is [Invoice & Delivery Note.pdf](#), for example, the URL must be changed to [Invoice%26 Delivery Note.pdf](#).

As with the [function \*Parameter values\*](#), the resubmission can also be opened here using OpenResubmission. Therefore, please observe the notes there, which also apply to the URL schema.

For example, the calls from a web application could look like this:

```
<a href="signoSign2://OpenResubmission">Resubmission</a>
<a href="signoSign2://OpenResubmission?ID=96&User=Ferenc
Hilker">Resubmission filtered</a>
```

## 4.7 Read-only document types

You can use read-only document types in signoSign/2, to prevent them from being altered, deleted or exported. To do this, you need to export the document type administration ([signoSign2\\_DocTypes.xml](#)) with the corresponding document types and rename it to

**signoSign2\_DocTypes\_Locked.xml**. You can now distribute this renamed file to restrict access to the corresponding users. Do this by placing the file in the folder that was defined in [setting Directory for document types](#). If you now start signoSign/2 and call up document type administration, all document types from **signoSign2\_DocTypes\_Locked.xml** are displayed, along with the existing document types from **signoSign2\_DocTypes.xml**. The read-only document types are shown in italics and are initially disabled (greyed out). To activate a document type, select it and activate the [setting Use document type](#). It is then activated in the list and displayed as blue text. All other settings are disabled and cannot be changed. Only the order of the document types can be changed and a copy can be created.

#### 4.8 Available keyboard shortcuts for the signature dialog

The signature dialog on the computer has various buttons that can also be called up via key combinations. The following table aims to provide an overview.

Button	Keyboard shortcut	Note
OK	Alt + O	Disabled as long as the confirmation text is displayed.
Retry	Alt + R	Disabled as long as the confirmation text is displayed.
Skip	Alt + S	Disabled as long as the confirmation text is displayed, only one signature field is present or the signature is only requested for one signature field, and if it is a mandatory field and the <a href="#">setting Do not allow mandatory fields to be skipped</a> is enabled.
Cancel	ESC	
Change the signature device	Alt + C	Hidden as long as no second signature device is configured.
Change Device	Alt + U	Only available with the mobile capture plug-in. Enables the mobile device to switch to signature capture.

#### 4.9 Available placeholders

signoSign/2 provides various placeholders that can be used in different places. The following table aims to provide an overview.






Placeholder	Description	Note
%docTypeIndexFile%	Content of the document type index file	Only available for the <a href="#">setting Content of the main index file</a> .
%sigFieldName%	Signature field name	Only available for the <a href="#">setting Save signatures as images</a> and the <a href="#">setting Save biometric data to files</a> .









%sigImage%	Path of the image of the signature	Only available for the <a href="#">setting</a> <b>Save signatures as images</b> .
%bioFile%	Path of the file containing the biometric data	Only available for the <a href="#">setting</a> <b>Save biometric data to files</b> .
%orgFileName%	Original file name	
%title%	Document title	
%numSignatures%	Number of signatures	
%user%	User name	
%machine%	Machine name	
%guid%	Globally Unique Identifier (GUID)	
%ip%	IP address	
%mac%	MAC address	
%dateShort%	Current date, short format (29.09.2019)	
%dateLong%	Current date, long format (Thursday, 29 August 2019)	
%timeShort%	Current time, short format (09:49)	
%timeLong%	Current time, long format (09:49:40)	
%signoCounter%	signoCounter	Not available everywhere.
%dateFileName%	Current date, short format (2019-08-29)	Only available for the <a href="#">setting</a> <b>Configure Archive Service</b> , the <a href="#">setting</a> <b>Generate index file</b> and the <a href="#">setting</a> <b>General settings</b> .
%timeFileNameShort%	Current time, short format (09.49.40)	Only available for the <a href="#">setting</a> <b>Configure Archive Service</b> , the <a href="#">setting</a> <b>Generate index file</b> and the <a href="#">setting</a> <b>General settings</b> .
%timeFileNameLong%	Current date, long format (09.49.40.6692)	Only available for the <a href="#">setting</a> <b>Configure Archive Service</b> , the <a href="#">setting</a> <b>Generate index file</b> and the <a href="#">setting</a> <b>General settings</b> .

%archiveFile%	Archive file	Only available for the <a href="#">setting</a> <b>Default values for messages</b> and the <a href="#">setting</a> <b>Additional actions</b> .
%indexFile%	Index file	Only available for the <a href="#">setting</a> <b>Additional actions</b> .
%archiveName%	Name of the archive file	Only available for the <a href="#">setting</a> <b>Generate index file</b> .
%var1% to %var30%	Placeholder 1 to 30	
%randomX%	Random number	X must be replaced by a number that defines the number of digits of the random number. Example: <i>%random4%</i> for <b>1896</b>
%dateTimeX%	Current time stamp, user defined format	X must be replaced by the format. Example: <i>%dateTimedd.MM.yyyy%</i> for <b>12.04.1896</b>
%docTypeName%	Name of the document type	

#### 4.10 Available buttons on the signature pad

signoSign/2 provides various buttons in the signature device which are available in specific constellations. The first button design of the signature device Delta will be used as an example. The following table aims to provide an overview.

Button	Function	Note
	Skip to the first page of the document	Only for signature device Delta & Alpha in interactive signing mode
	Skip to the previous page of the document	Only for signature device Delta & Alpha in interactive signing mode
	Skip to the next page of the document	Only for signature device Delta & Alpha in interactive signing mode
	Skip to the last page of the document	Only for signature device Delta & Alpha in interactive signing mode
	Start signing mode	Only for signature device Delta & Alpha in interactive signing mode

	Start note mode	Only for signature device Delta in interactive signing mode
	Start marking mode	Only for signature device Delta in interactive signing mode
	Exit reading mode and disconnect the signature device	Only for signature device Delta in interactive signing mode
	Reject confirmation text and cancel signing, note or marking mode	Confirmation text for all signature devices, modes cancel only the interactive signing mode
	Delete signature, note or marking and recapture	Signature for all signature devices, note and mark only for the interactive signing mode
	Skip signature field	Only for signature device Delta & Alpha in interactive signing mode
	Accept confirmation text and insert signature, note or mark	Confirmation text and signature for all signature devices, note and mark only for the interactive signing mode
	Rotate view 180°	Only for the signature device Alpha

## 5 Plug-ins

You have the option to extend the software signoSign/2 with plug-ins, which provide various special functionalities. These plug-ins are provided as individual setup programs and can be installed after the normal signoSign/2 installation. Once the plug-in has been installed successfully, you can find the relevant information on the plug-in in the [property Plug-in information](#). If you have not already done so, you only have to activate a licence that supports this plug-in. The plug-ins that are currently available are presented below:

### 5.1 Mobile capture

This plug-in allows you to capture signatures using the signoCapture app on a mobile device. The mobile device must be in the same network via WLAN as the computer on which signoSign/2 is installed. For this purpose, run the following setup program after installing: ***signotec\_s2\_Plug-In\_Mobile\_Capture\_x.x.x\_xxBit.exe***

#### 5.1.1 Installing the app

The ***signoCapture*** app must be installed on the mobile device. You can obtain it from here ([Google Play](#) or [App Store](#)).



### 5.1.2 Plug-in configuration

The mobile capture plug-in must be configured as a signature device. You can do this in the configuration under the [setting](#) **Select signature device**.

### 5.1.3 Signing with the plug-in

To capture a signature with the mobile device, the app must be started on the device. You will be shown a **Pairing Code** that is required for connecting the app and the signoSign/2. Use the adjacent button to generate a new pairing code. If you start a signature process, the 'Connection to mobile device' dialog will now be displayed. Under **Mobile Device**, all devices that have been found on the network and have installed and opened the app are displayed by their **model name**. Select a device from the list to be used for signature capture. Then enter the value displayed in the app on your mobile device under **Pairing Code**. This procedure only needs to be performed once, so the same device will be used for the next signature process, provided the pairing code has not been changed. To establish the connection between the app and signoSign/2, click on **OK**. You can close the dialog by clicking **Cancel**. Once connection has been successful, the confirmation text or the signature dialog directly will be displayed in the app, depending on the configuration. You can now use the familiar buttons to control the further proceedings.

## 5.2 IP list capture

You can use this plug-in to configure any number of signature devices that can be addressed by IP in signoSign/2 and use them for signing. For this purpose, run the following setup program after installing signoSign/2: **signotec\_s2\_Plug-In\_IP\_List\_Capture\_x.x.x\_xxBit.exe**

### 5.2.1 Plug-in configuration

The IP list capture plug-in must be configured as a signature device. You can do this in the configuration under the [setting](#) **Select signature device**. Further setting options for the plug-in itself are available under [setting](#) **Configuring the IP list capture plug-in**.

### 5.2.2 Signing with the plug-in

To capture a signature with one of the configured IP signature devices, the signing process must be started. The 'Select signature devices' dialog will be displayed, where all the plug-ins configured IP signature devices are displayed. Each device contains the information **Description** and **Address**. Now select an available IP signature device and click **OK** to start the signing process on this device. You can close the dialog by clicking **Cancel**. IP signature devices that are shown in red are not accessible and cannot be used for the signing process. Therefore check the connection.

## 5.3 Smart card signing

With this plug-in, you can capture a qualified signature using a signature card and a card reader. Execute the following setup program after you have installed signoSign/2: **signotec\_s2\_Plug-In\_Smart\_Card\_Signing\_x.x.x\_xxBit.exe**

### 5.3.1 Plug-in configuration

The Smart Card Signing plug-in must be configured as a signature device. You can do this in the configuration under the [setting](#) **Select signature device**.

### 5.3.2 Signing with the plug-in

To capture a signature with a signature card, the signing process must be started. Afterwards, or even before, insert the signature card into the card reader. The normal signature dialog is displayed, where you can click **OK** to display a list of existing certificates and **Cancel** to close the dialog. All certificates from **Own certificates** from the **Windows Certificate Store** are displayed. Some signature cards, such as those from D-TRUST, can only be used in conjunction with middleware. Select the desired certificate from this list

and click **OK**. Now enter the PIN of your signature card on the card reader and confirm it. If the PIN is correct, the signature will be inserted into the document. The signature image shows the certificate holder, the date and time, and a signotec logo in the background. This logo cannot be altered. As before, you can **Cancel** the signing process and close the dialog.