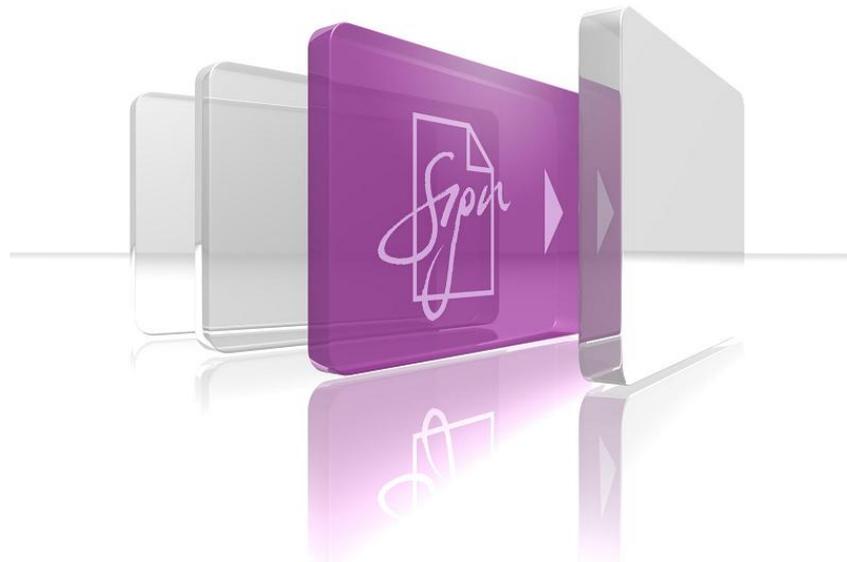


# SIGNificant Offline Client

v1.5

User Guide v1.1



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SIGNificant xyzmo group wishes to thank Foxit Software (<http://www.foxitsoftware.com>), whose product is used in SIGNificant to convert PDF documents to graphics.



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## Introduction

This chapter introduces SIGNificant Offline Client and this guide.

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## About xyzmo SIGNificant

xyzmo SIGNificant Group is a leading provider of electronic and digital signature solutions, offering an exclusive product line that equips organizations with a smooth transition into a secure paperless environment. Our digital signature solutions, including the digital stamp and the personal electronic and biometric signature, represent the basis for integrated digital processes. xyzmo SIGNificant products are used by leading companies in various industries such as telecommunications, banking, insurance, pharmaceutical, and others.

## About SIGNificant Offline Client

SIGNificant Offline Client allows users to quickly and easily design, sign, and print documents, without accessing the SIGNificant server. This solution is especially suitable for professionals who work offline or who do not have Internet connectivity on a regular basis. For example, insurance agents can sign policies in the field, lawyers can sign contracts while visiting clients, and customers can sign sales agreements at a point of sale (POS).

SIGNificant Offline Client users can prepare fully designed documents that specify exactly who must sign the document, how they must sign, and where their signatures should appear in the document. Alternatively, users can design and sign documents on the fly.

Documents can be signed using a digital pen and tablet, or using a certificate. The signature is then embedded in the document. If desired, SIGNificant Offline Client can authenticate the signature biometrically, by checking the signature against the signer's enrolled signature in the SIGNificant Biometric Server, when Internet connectivity is established. By eliminating pen-and-paper signatures, SIGNificant Offline Client transforms your office into a time-efficient and environmentally friendly place.

Once all signers have signed a document, it is secured against further modification and saved locally. The document can then be viewed by any user using Adobe Acrobat Reader, and it can be uploaded to the company's server when Internet connectivity is established.

## About This Guide

This guide contains all the information necessary to install and use SIGNificant Offline Client.

## Related Publications

This guide should be used in conjunction with:

- *SIGNificant Online Client User Guide*
- *SIGNificant Offline Client Administrator Guide*



## Setting Up SIGNificant Offline Client

This chapter explains how to install, register, and uninstall SIGNificant Offline Client.

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## Requirements

In order to install and register SIGNificant Offline Client, you must have administration rights on the local machine. In addition, the machine must meet the following requirements.

**Table 1: SIGNificant Offline Client Requirements**

Item	Requirement
<b>Hardware</b>	
Digital pen and tablet	A Wintab-compatible pen and tablet
Smartcards or tokens	Required only if certificates that are located on smartcards or tokens are to be used
Internet connection	Required only if biometric authentication is used
Printer port	
<b>Software</b>	
General certificate	If a signers does not use a personal certificate to sign the document, the document is sealed with a general certificate. While SIGNificant Offline Client comes with a demo certificate, it is recommended to use a certificate that is issued to you or your company.
Personal software certificate	Signers can seal a document with a personal certificate, in addition to or instead of their handwritten signature.
Relative driver for tablet	
Relative driver for smartcard readers or tokens	
OS	Microsoft Windows XP, Microsoft Windows Vista
Development environment	Microsoft .NET Framework 2 and up
Registration (challenge/license key)	SIGNificant Offline Client comes with a built-in 90-day demo license. Once the license has expired, you must register your software in order to obtain another license.

## Workflow

Setting up SIGNificant Offline Client includes the following steps:

1. Install SIGNificant Offline Client.  
See *Installing SIGNificant Offline Client* on page [8](#).
2. Register your SIGNificant Offline Client software.  
See *Registering SIGNificant Offline Client Software* on page [12](#).
3. (Optional) To enable signers to digitally sign documents using a certificate, install a certificate.  
See *Installing Certificates* on page [13](#).

## Installing SIGNificant Offline Client

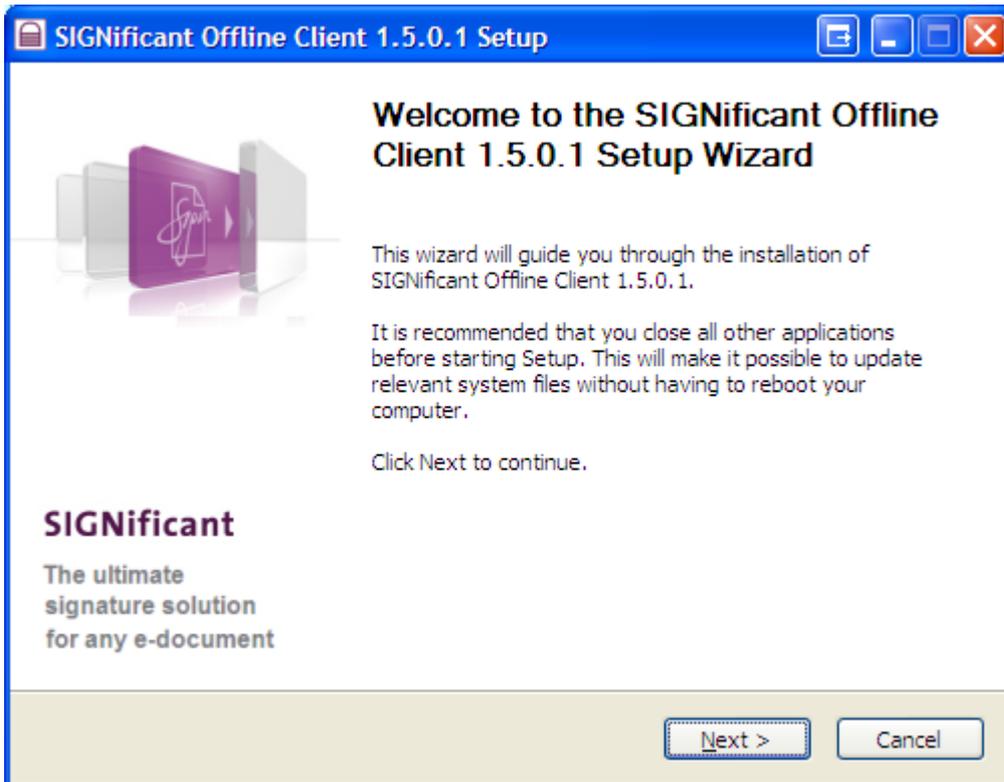
### **To install SIGNificant Offline Client**

1. Double-click on the file `SIGNificant Offline Client.exe`, located on the Installation CD.

The following screen appears.

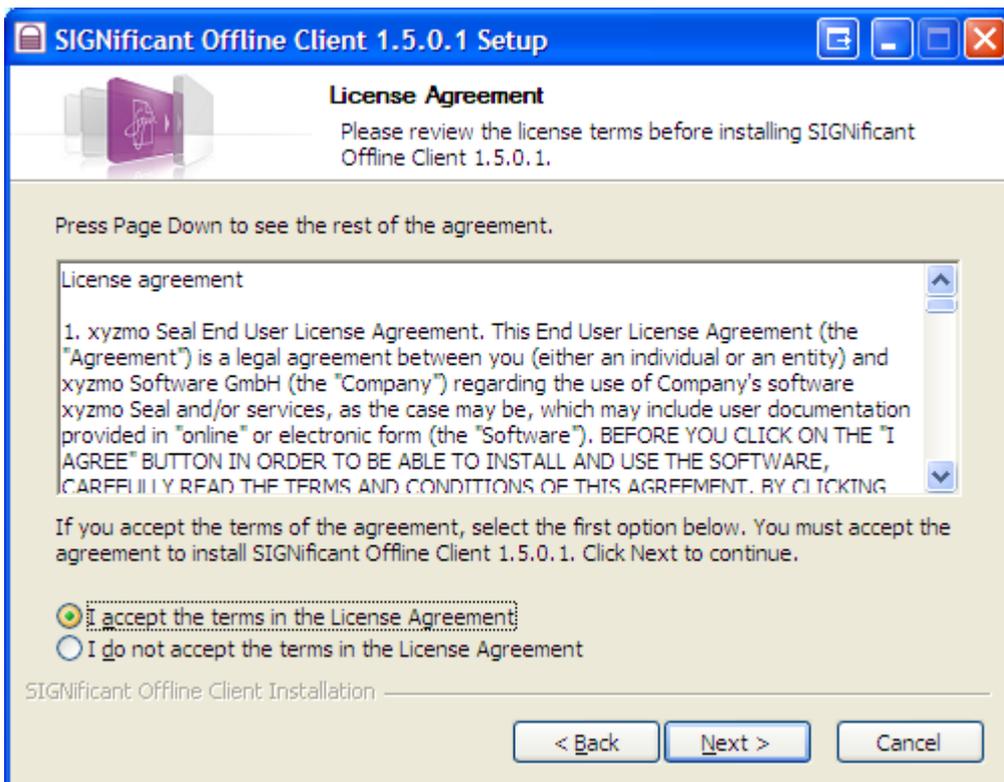


The **SIGNificant Offline Client Setup Wizard** opens displaying the **Welcome** screen.



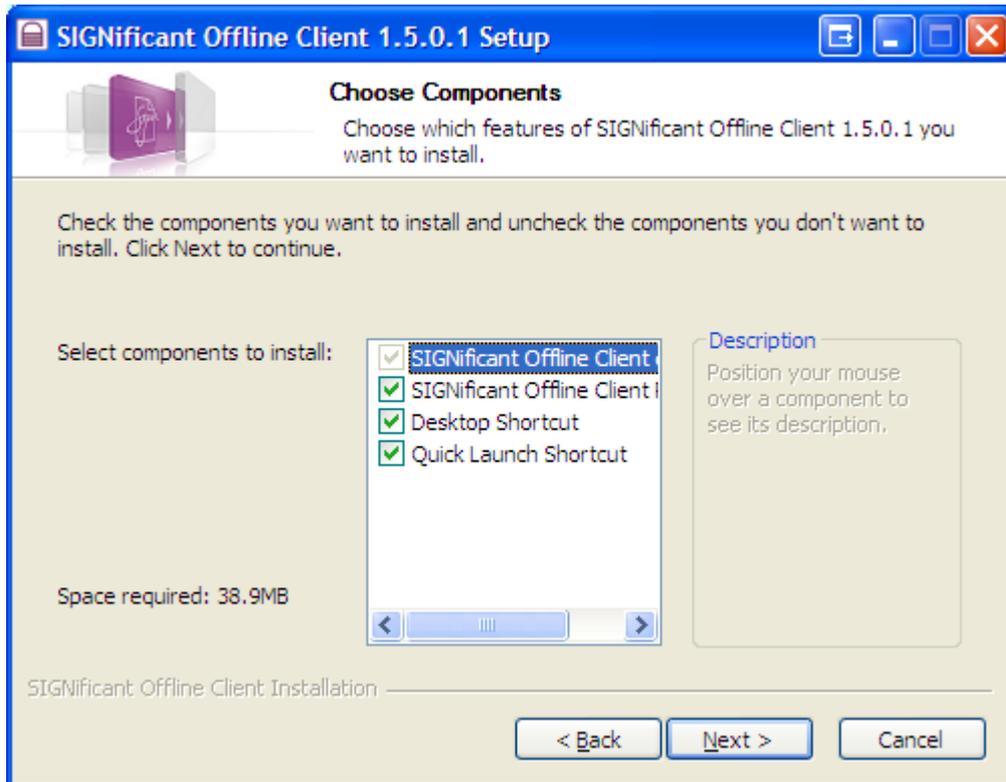
2. Click **Next**.

The **License Agreement** dialog box appears.



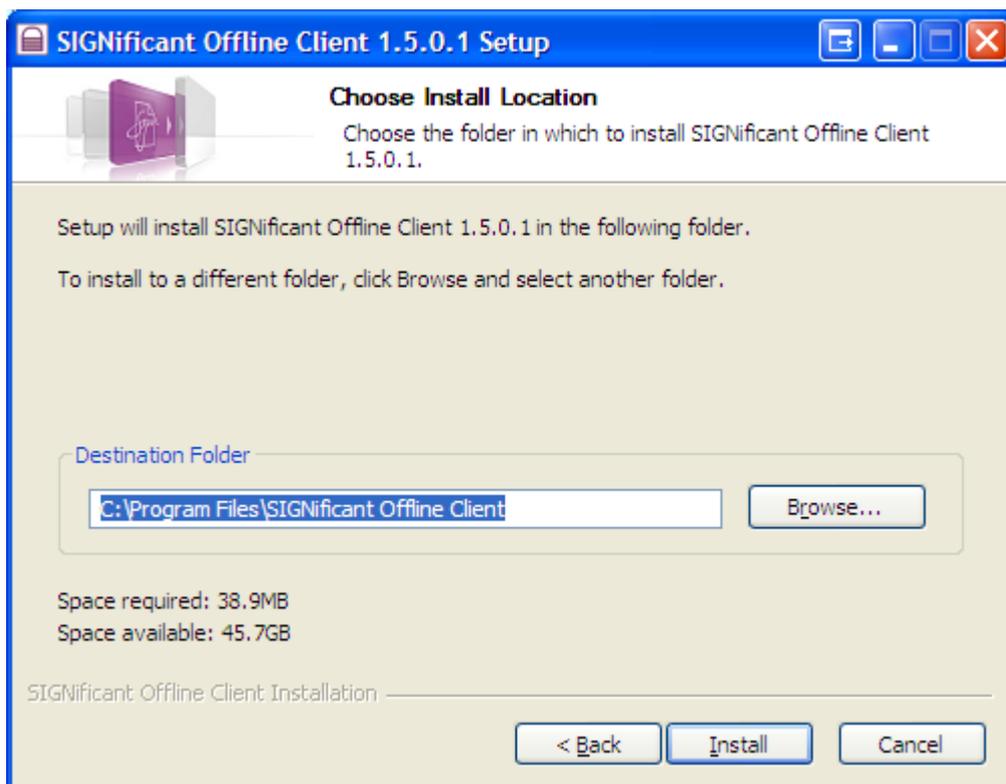
3. Read the license agreement, and click **I accept the terms in the License Agreement**.
4. Click **Next**.

The **Choose Components** dialog box appears.



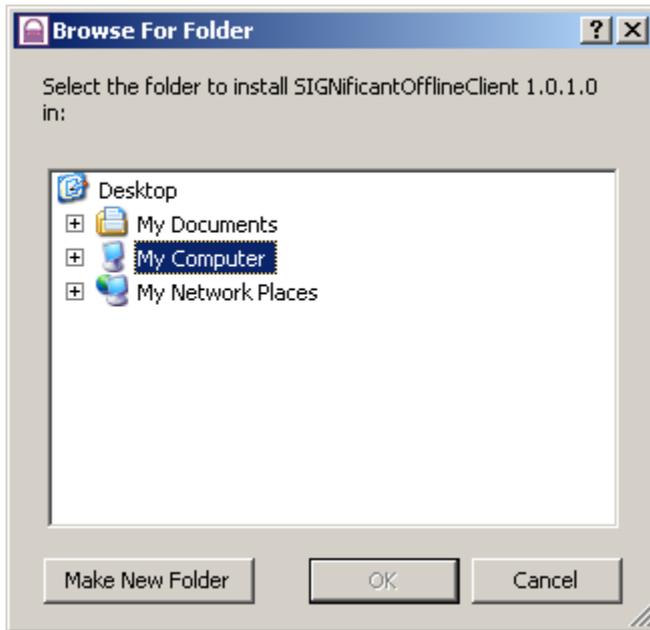
5. Select the check boxes next to the components you want to install.
6. Click **Next**.

The **Choose Install Location** dialog box appears displaying the default installation folder.



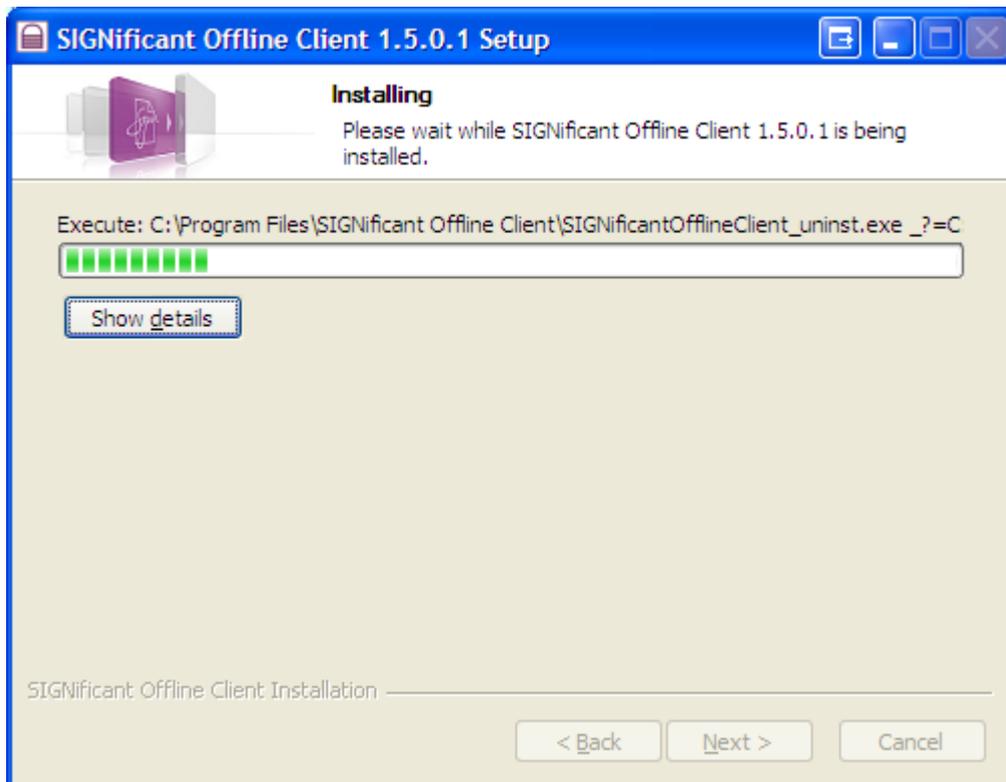
7. To install SIGNificant Offline Client to a different folder, do the following:
  - a. Click **Browse**.

The **Browse For Folder** dialog box appears.



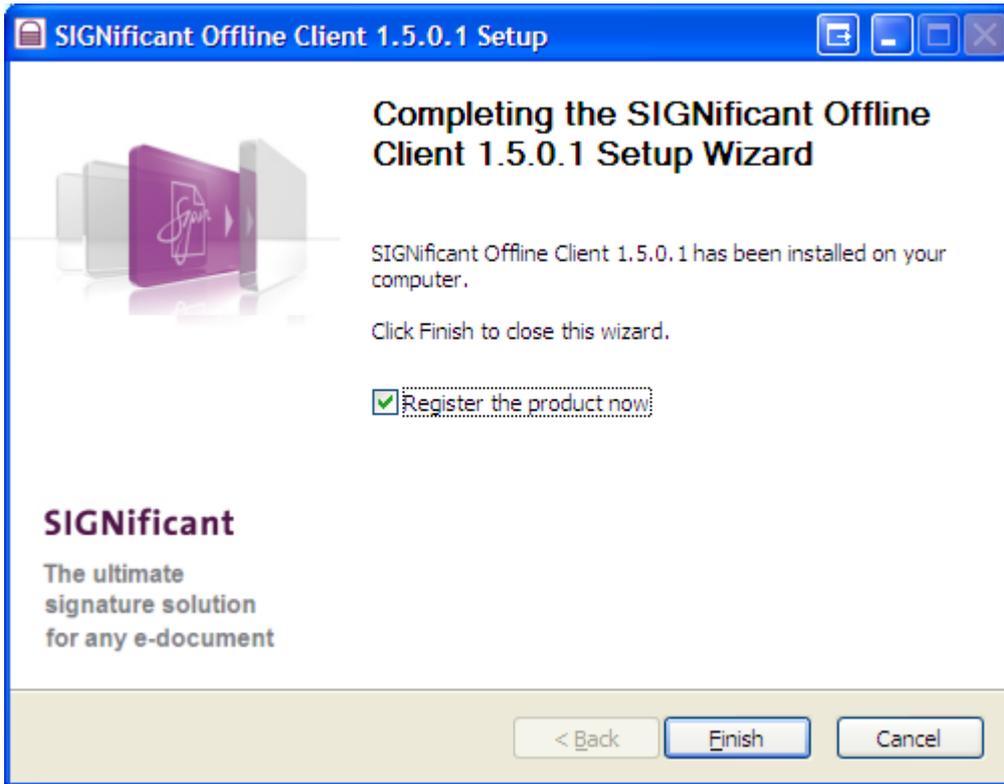
- b. Browse to the desired folder.
  - c. Click **OK**.
8. Click **Install**.

The **Installing** screen appears.



SIGNificant Offline Client is installed. A progress bar tracks the installation process. If desired, you can view installation details, by clicking **Show details**.

At the end of the installation process, the **Completing the SIGNificant Offline Client Setup Wizard** screen appears.



9. Click **Finish**.

The wizard closes.

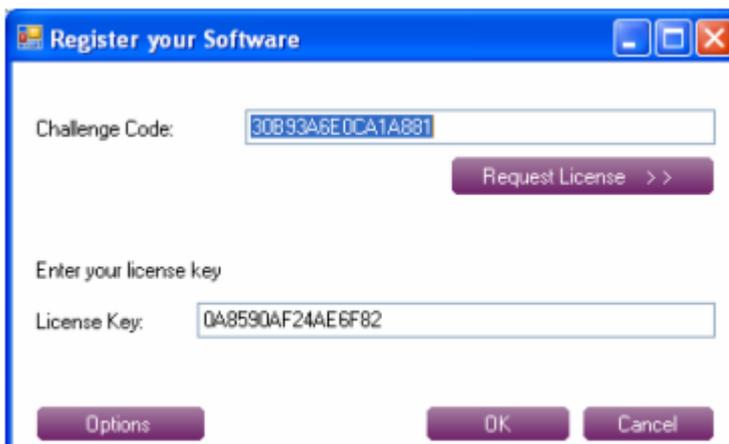
## Registering SIGNificant Offline Client Software

SIGNificant Offline Client comes with a built-in 90-day demo license. Once the license has expired, you must register your software in order to obtain another license.

### To register your SIGNificant Offline Client software

1. Click **START > Program Files > SIGNificant > SIGNificantOfflineClient > Configure License**.

The **Register your Software** dialog box appears.



2. Click **Request License**.  
Your browser opens displaying a form.
3. Do one of the following:

- To obtain a demo license, click **Request demo license**.
  - To obtain a permanent license, click **Request permanent license**.
4. Copy the Challenge Code from the **Register your Software** dialog box, and paste it in the relevant field.
  5. Complete the rest of the form with your details.

---

**Note:** You must supply a valid email address.

You will receive an email containing a license key.

6. Copy the license key from the email, and paste it into the **Register your Software** dialog box's **License Key** field.
7. Click **OK**.

## Installing Certificates

In order to enable signers to use a certificate to digitally sign documents in SIGNificant Offline Client, either instead of or in addition to a digital tablet, you must install a certificate.

### **To install a certificate**

1. Obtain a certificate from any certificate authority (CA), and store it on your computer.

---

**Note:** If the desired certificate is located on a token or smartcard, you will need to install additional software. Contact the token or smartcard vendor for further information.

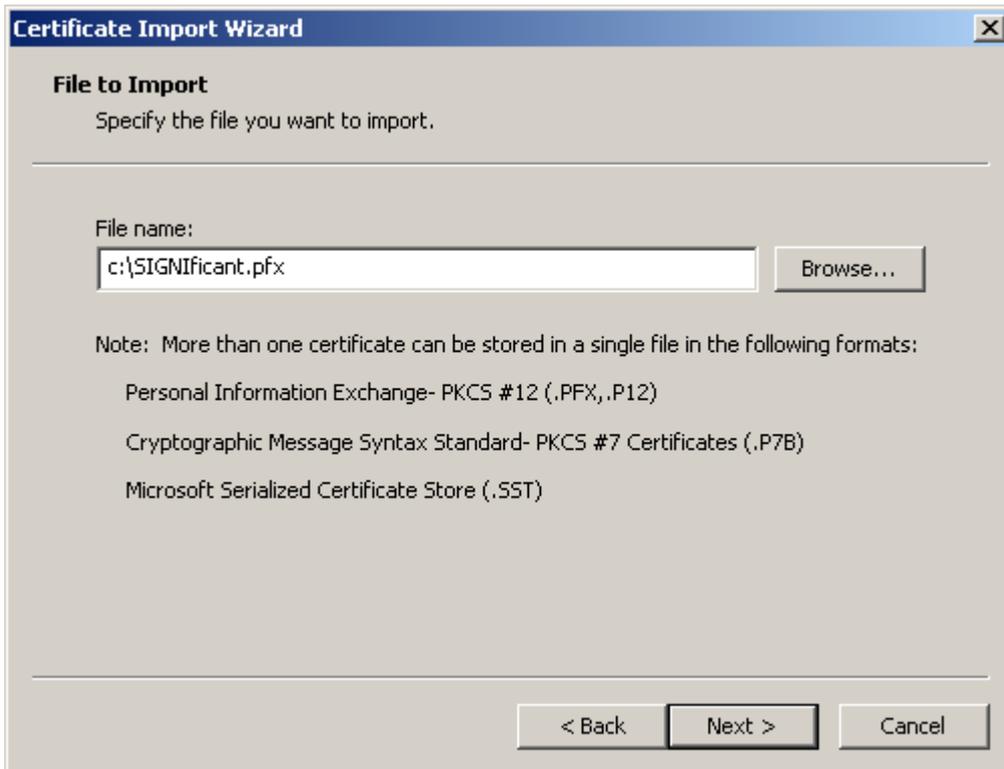
2. Double-click on the certificate.

The **Certificate Import Wizard** opens displaying the **Welcome** screen.



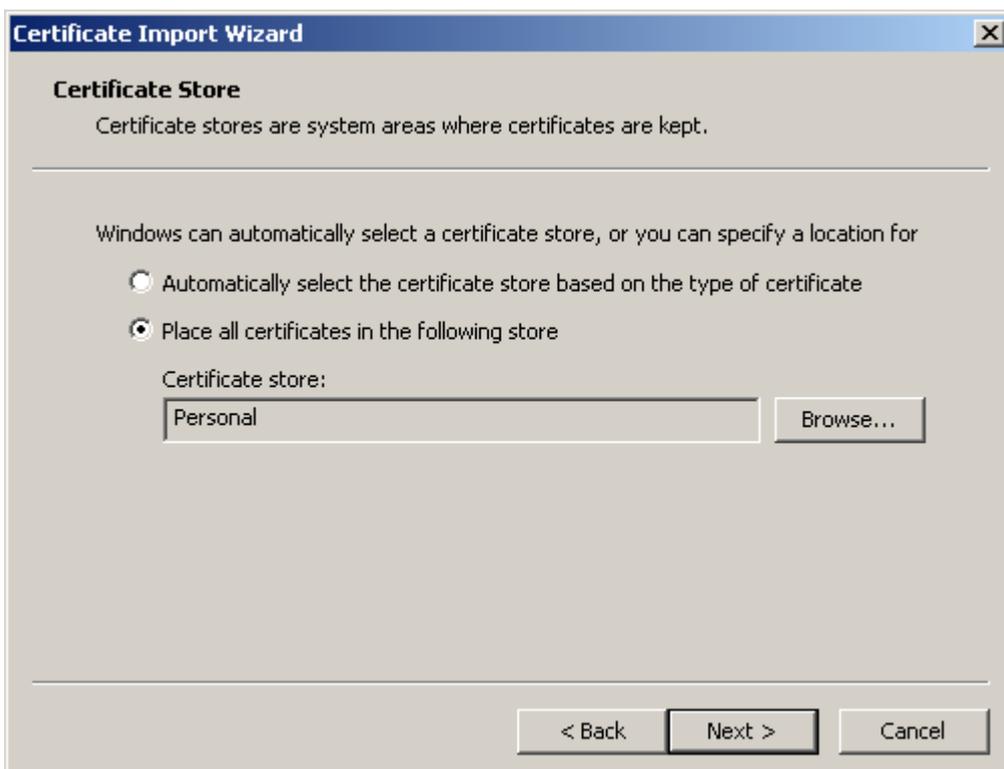
3. Click **Next**.

The **File to Import** dialog box appears.



4. Click **Next**.

The **Certificate Store** dialog box appears.



5. Click **Place all certificates in the following store**.
6. Click the **Browse** button and browse to the **Personal** certificate store.
7. Click **Next**.

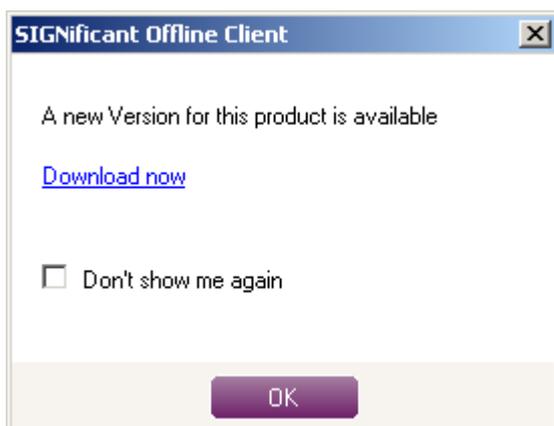
The **Completing the Certificate Import Wizard** dialog box appears.



8. Click **Finish**.
9. To check that you installed the certificate successfully:
  - a. In Internet Explorer, click **Tools > Internet Options**.
  - b. Click the **Content** tab.
  - c. Click **Certificates**.
  - d. Click the **Trusted Root Certification Authorities** tab.
  - e. Select the relevant certificate.
  - f. Click **View**.
  - g. Check that the information displayed is correct and that the certificate is valid.

## Updating SIGNificant Offline Client

If SIGNificant Offline Client was installed by your company's network administrator, it may be configured to automatically check for updates. In this case, a dialog box may appear when you start SIGNificant Offline Client, notifying you that a newer version of SIGNificant Offline Client is available for download.



Do one of the following:

- To update SIGNificant Offline Client, click **Download now**.
- To continue to SIGNificant Offline Client without updating it, click **OK**.

## Uninstalling SIGNificant Offline Client

### *To uninstall SIGNificant Offline Client*

1. In the START menu, click **Control Panel**.
2. Double-click **Add or Remove Programs**.  
The **Add or Remove Programs** window opens.
3. Select **SIGNificant Offline Client**.
4. Click **Change/Remove**.  
A confirmation message appears.
5. Click **Yes**.  
SIGNificant Offline Client is uninstalled.  
A success message appears.
6. Click **OK**.

---

## Getting Started with SIGNificant Offline Client

This chapter introduces the SIGNificant Offline Client interface.

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## Accessing SIGNificant Offline Client

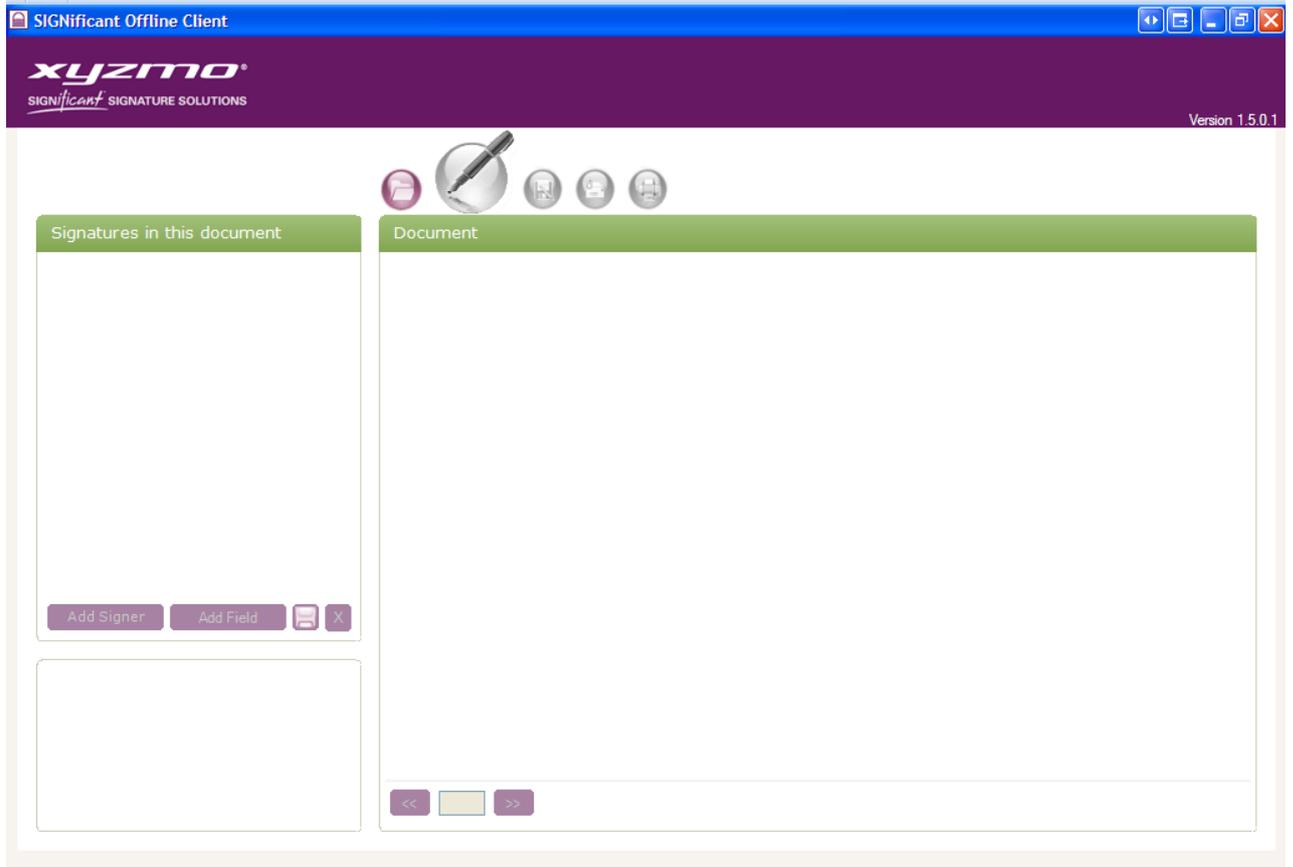
### *To access SIGNificant Offline Client*

- Do one of the following:



- If you installed a desktop shortcut, click  on your desktop.
- If you installed a Quick Launch shortcut, click  on your Quick Launch bar.
- In the START menu, click **All Programs > SIGNificant > SIGNificant Offline Client**.

The SIGNificant Offline Client main screen appears.

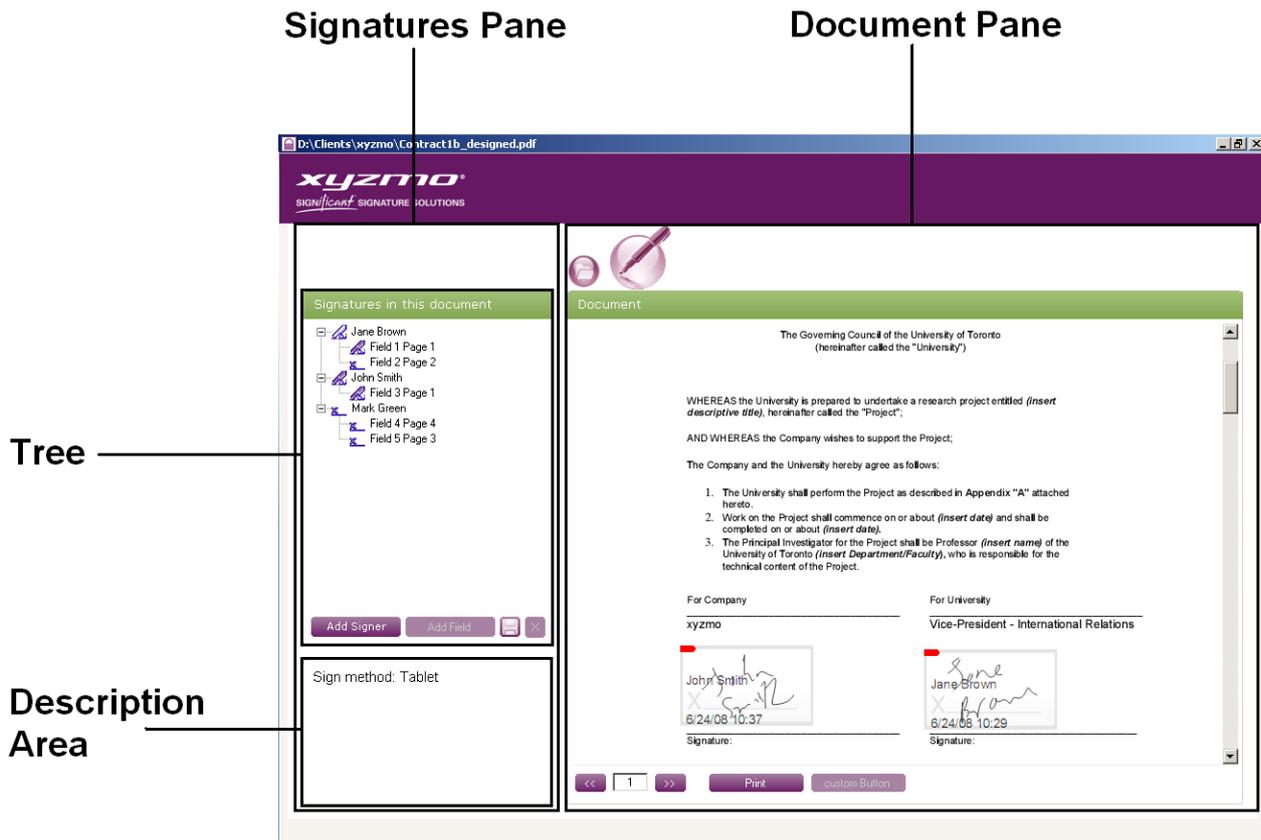


## Using the SIGNificant Offline Client Interface

The SIGNificant Offline Client interface consists of the following major elements:

- **Signatures Pane.** The Signatures Pane allows working with signers and signature fields in the currently open document. It includes the following:
  - **Tree.** The tree displays all defined signers and signature fields for the current document. See *Using the Tree* on page 19.
  - **Description Area.** The description area displays information about the signer or signature field that is selected in the tree. See *Using the Description Area* on page 20.

- **Document Pane.** The Document Pane displays the currently open document and enables you to navigate between the document's pages. See *Navigating the Document* on page 20.



## The SIGNificant Offline Client Interface

### Using the Tree

Tree nodes that represent a signer can be expanded to reveal the signer's signature fields or collapsed.

#### To expand a node

- Click the  icon next to the node.  
The node is expanded.

#### To collapse a node

- Click the  icon next to the node.  
The node is collapsed.

In addition, each node in the tree is marked with one of the following icons:

**Table 2: Tree Icons**

When this icon...	Appear next to a signer, it indicates that...	And when it appears next to a signature field, it indicates that...
	The signer has not yet signed the document.	The signature field has not yet been signed.
	The signer has signed the document.	The signature field has been signed.

## Using the Description Area

### To use the Description Area

- In the tree, click on the signer or signature field on which you want to view information.  
If you clicked on a signer, the Description Area displays the selected signing method for the signer. If biometric authentication is selected for the signer, this information is displayed as well.  
If you clicked on a signature field, the Description Area displays the signature field's description.

## Navigating the Document

### To navigate a document

- In the Document Pane, do any of the following:
  - To view the next page, click .
  - To view the previous page, click .
  - To jump to a specific page, type the desired page number in the field provided at the bottom of the pane and press **ENTER**.

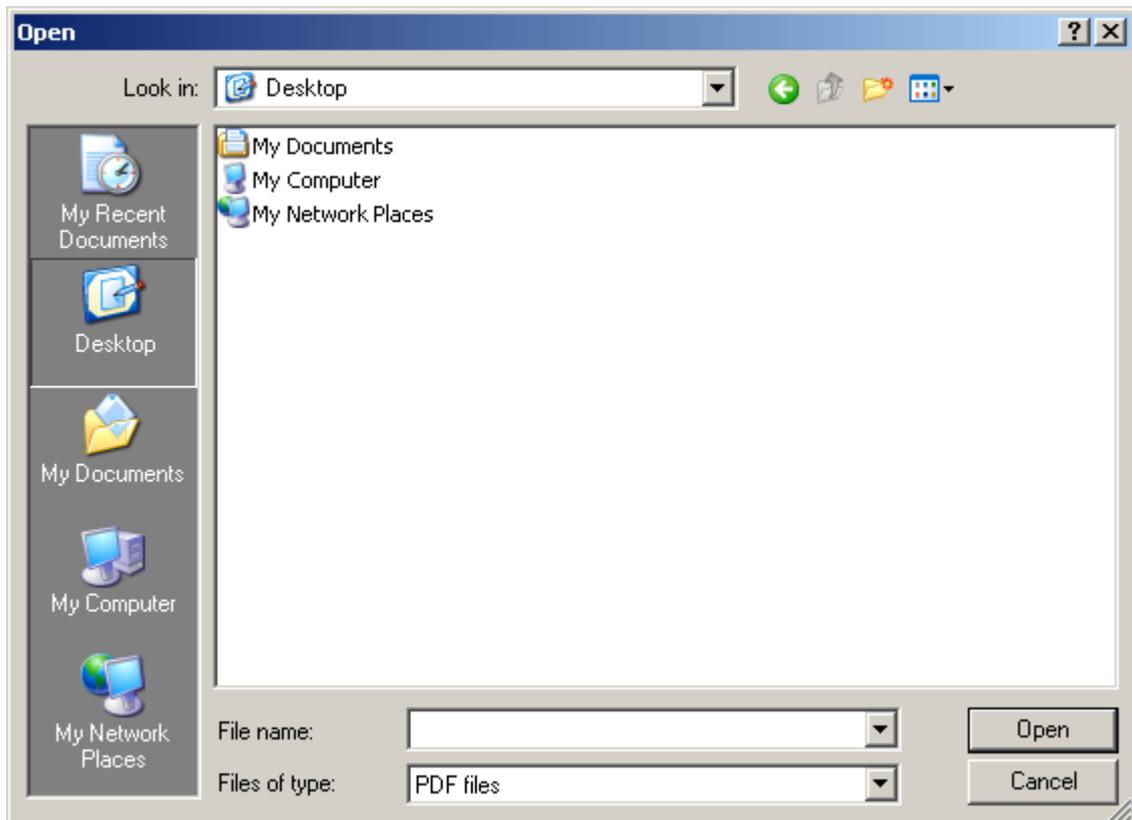
## Opening Documents

SIGNificant Offline Client supports opening \*.pdf files only.

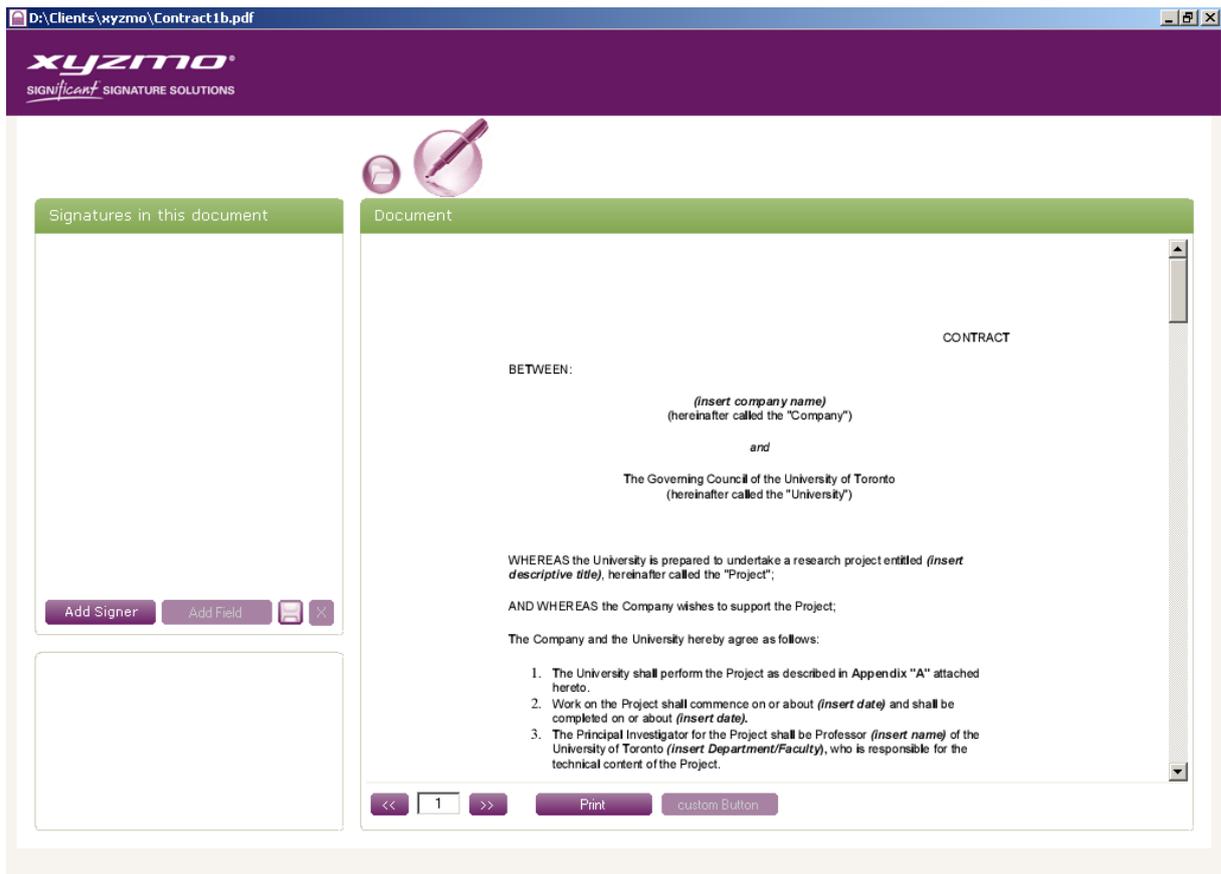
### To open a document

- Click .

The **Open** dialog box opens.



2. Browse to the desired document.
  3. Click **Open**.
- The document opens in SIGNificant Offline Client.



## Saving Copies of a Document

You can save open documents at any stage, whether they are currently being designed, or are partially signed.

**Note:** When saving a copy of the current document all signature fields which were added after the last signature are omitted. This is due to the fact that these empty signature fields are a change to the document and will invalidate the previous signature. Use the “save design” button described later to explicitly save the document including new (and empty) signature fields.

### To save a document



1. Click  .  
The **Save As** dialog box opens.
2. Browse to the desired directory.
3. Type the desired file name.
4. Click **Save**.  
The document is saved.

## Closing SIGNificant Offline Client

### *To close SIGNificant Offline Client*

- Close the window. All your signatures are automatically saved.

## Designing Documents

This chapter explains how to design documents.

**Note:** The SIGNificant Offline Client administrator may choose to disable designing documents for security reasons. In this case, the relevant buttons will be disabled, and you should skip to the next chapter in this guide.

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## Designing Documents in SIGNificant Offline Client

Designing a document in SIGNificant Offline Client involves specifying the following:

- Which users are the signers who must sign the document
- Where the signatures should be located
- The signing method to use for each signer
- Whether the signatures must be biometrically authenticated

### **To design a document**

1. Open the desired document.  
See *Opening Documents* on page [20](#).
2. Add each signer who should sign the document.  
See *Adding Signers* on page [23](#).
3. Add one or more signature fields for each signer.  
See *Adding Signature Fields* on page [25](#).
4. (Optional) Remove signers as needed.  
See *Removing Signers* on page [26](#).
5. (Optional) Remove signature fields as needed.  
See *Removing Signature Fields* on page [26](#).
6. (Optional) Save the document.  
See *Saving Documents* on page [21](#).

## **Adding Signers**

### **To add a signer**

1. Click  .

The **Add New Signer** dialog box opens.



2. In the **Signer** field, do one of the following:
  - To specify a new signer, type the signer's name.
  - To specify a signer who you already added, select the signer's name from the drop-down list.
3. In the **Method** drop-down list, specify which signing method the signer can use to sign the document.

If you select **Ask**, the signer will be able to choose the signing method.
4. (Optional) To specify that the signer's signature should be authenticated biometrically, select the **Authenticate** check box.

---

**Important:** If you select this option, the signer's signature must be enrolled in the SIGNificant Biometric Server before signing the document, and the name specified in the **Signer** field must be *identical* to the signer's username in the SIGNificant Biometric Server; otherwise, document signing will fail. For information on enrolling signatures, refer to the *SIGNificant Online Client Administrator Guide*.

---

5. Do one of the following:
  - To save the signer and return to the SIGNificant Offline Client main screen, click **Save**.
  - To save the signer and configure another signer, click **Save And New**.
  - To close the dialog box without saving the signer, click **Close**.

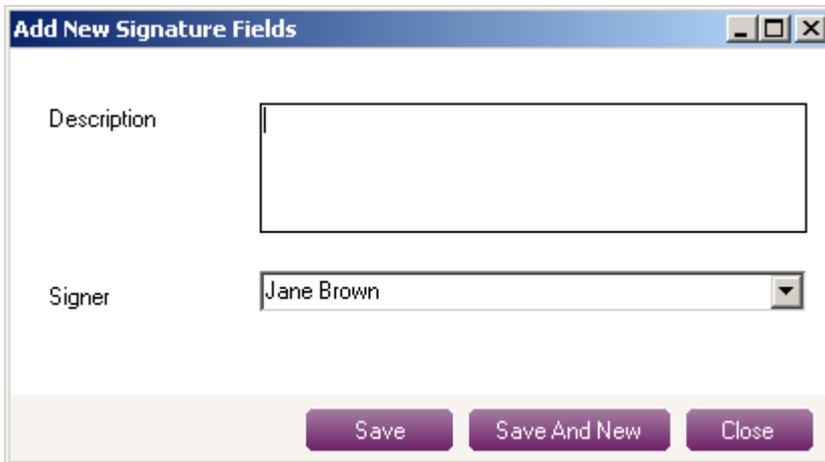
The signer appears in the signer tree.

## Adding Signature Fields

### To add a signature field

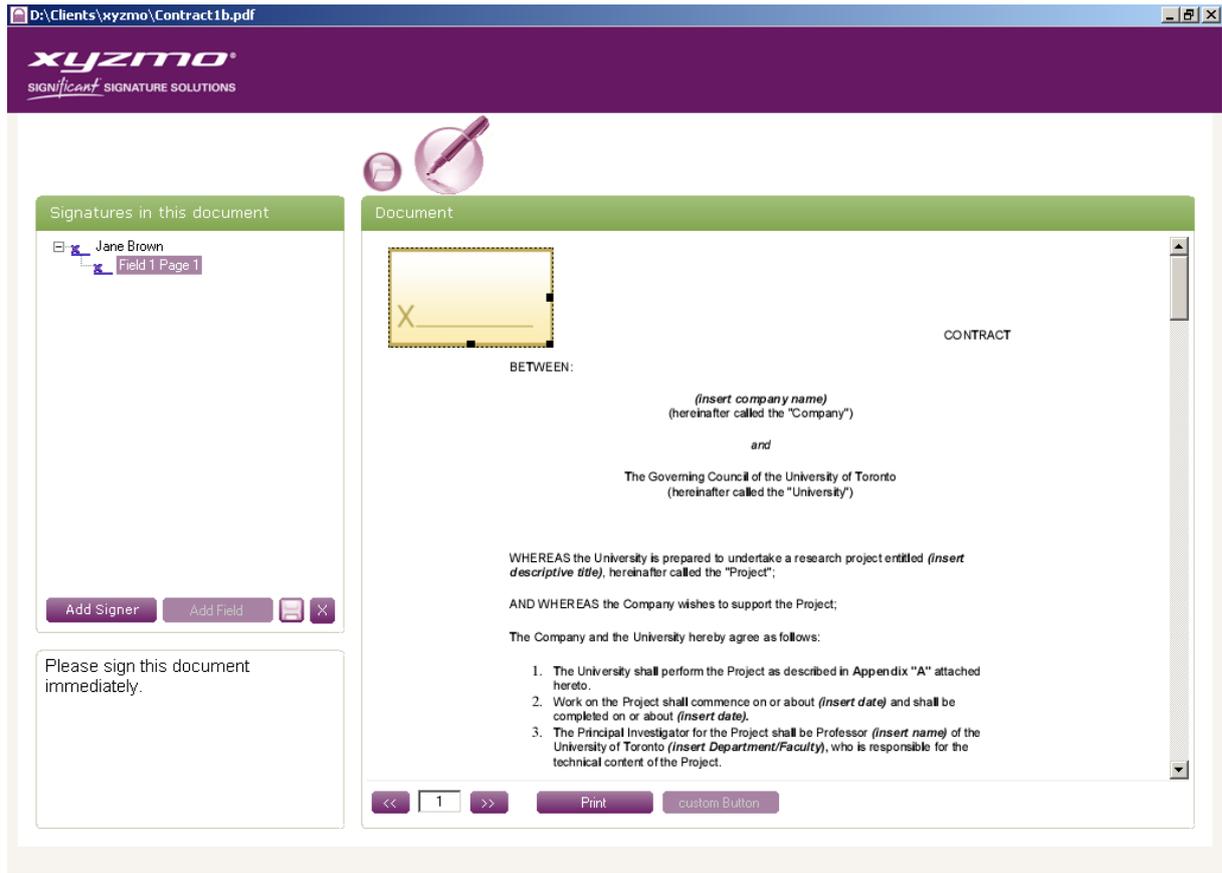
1. In the signer tree, click on the desired signer.
2. Click .

The **Add New Signature Fields** dialog box opens.



3. (Optional) In the **Description** field, type a free text description of the signature.  
For example, "Please sign this document immediately."
4. In the **Signer** drop-down list, select the signer who should sign this signature field.
5. Do one of the following:
  - To save the signature field and return to the SIGNificant Offline Client main screen, click **Save**.
  - To save the signature field and configure another signature field, click **Save And New**.
  - To close the dialog box without saving the signature field, click **Close**.

The signature field appears in the signature tree, under the signer. In addition the signature field appears at the top of the document.



6. Drag the signature field to the desired location in the document.

## Removing Signers

### To remove a signer

- In the signer tree, do one of the following:
  - Right-click on the desired signer, and click **Delete** in the pop-up menu that appears.
  - Click on the desired signer, then click .

The signer and all of the signer's signature fields are removed from the tree and from the document.

## Removing Signature Fields

**Note:** If you remove a signature field that is the only signature field for a signer, the signer will be removed as well.

### To remove a signature field

- In the signer tree, do one of the following:
  - Right-click on the desired signature field, and click **Delete** in the pop-up menu that appears.
  - Click on the desired signature field, then click .

The signature field is removed from the tree and from the document. If it was the only signature field for the signer, the signer is also removed from the tree.

## Saving the Design

You can save open documents at any stage, whether they are currently being designed, or are partially signed.

---

**Note:** Once you have saved a document, no further changes can be made to the document design; however, signers can continue signing the document.

---

### To save a document

7. Click .  
The **Save As** dialog box opens.
8. Browse to the desired directory.
9. Type the desired file name.
10. Click **Save**.  
The document is saved.

## Designing Documents in Other Programs

If desired, you can design a document in a different program, convert it to PDF format, and then open it in SIGNificant Offline Client.

---

**Note:** You can only design text-based documents, such as Word documents.

---

Designing a document outside of SIGNificant Offline Client involves specifying the following:

- Which users must sign the document
- Where the signatures should be located
- The signature's description
- Whether the signatures must be biometrically authenticated

---

**Note:** When this method of designing documents is used, the signing method is per default automatically set to "Ask"; that is, the signer will be able to choose whether to sign using a tablet, certificate, or both.

---

### To design a document

1. Open the desired document in the relevant program.
2. In each location where a signature field should appear in the PDF, insert a signature string in the document.

Build the signature string using the relevant fields in *Signature String Fields* on page [28](#). The fields must be separated by commas, and the entire signature string must be enclosed in *accent marks*.

---

**Note:** The signature string must be in one of the following fonts: any Base14 font, Arial, Courier, Courier-Bold, Courier-Oblique, Courier-BoldOblique, Helvetica, Helvetica-Bold, Helvetica-Oblique, Helvetica-BoldOblique, Times-Roman, Times-Bold, Times-Italic, Times-BoldItalic, Symbol, or ZapfDingbats.

---

For example, the following signature string creates a signature field for user JohnS to sign.

```
`sig,uid=JohnS,bio=1`
```

The signature will be biometrically authenticated.

3. Print the document to the installed SIGNificant Offline Client printer.

To do so, you must select the SIGNificant Offline Client printer in the **Print** dialog box.

The following things happen:

- The document is converted to PDF format.
- The signature strings that you inserted during the design process are replaced by signature fields.
- SIGNificant Offline Client opens displaying the document.

**Table 3: Signature String Fields**

Field	Description	Example
sig	Creates a signature field in the PDF. This field is mandatory.	sig
fd	A free text description of the signature. The description cannot contain commas. After document circulation, the specified description will appear in the SIGNificant Offline Client <b>Description</b> area. This field is optional.	fd=Please sign this document immediately
uid	Indicates the signer's user ID. This field is optional.	uid=JohnS
bio	Indicates whether biometric authentication is required for this signature. This can have the following values: <ul style="list-style-type: none"> <li>• 0. Biometric authentication is not required.</li> <li>• 1. Biometric authentication is required.</li> </ul> The default value is 0. This field is optional.	bio=1

---

## Signing Documents

This chapter explains how to sign documents.

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## Signing Designed Documents

This procedure explains how to sign a document, in which the designer added you as a signer.

When you sign a document, *all* of the signature fields that require your signature are signed at once.

### *To sign a document*

1. Do one of the following:
  - To sign *all* signature fields that require your signature, in the tree, right-click on your name, and then click **Sign** in the popup menu that appears.
  - To sign a specific signature field, do one of the following:
    - In the tree, right-click on the desired signature field, and then click **Sign** in the popup menu that appears.
    - In the document, double-click on the desired signature field.

The **Sign** dialog box opens displaying your name in the **Signer** field.

2. (Optional) In the **Reason** drop-down list, select the reason you are signing the document.
3. (Optional) In the **Location** field, type your location.
4. If the **Method** drop-down list is enabled, choose which signing method to use by doing one of the following:

- To sign the document using a digital tablet, select **Tablet**.  
A signing area appears at the bottom of the dialog box.
- To sign the document using a digital certificate, select **Certificate**.  
The signing area at the bottom of the dialog box disappears.
- To sign the document using both a digital tablet and certificate, select **Tablet+Certificate**.  
A signing area appears at the bottom of the dialog box.

If the **Method** drop-down list is not enabled, it means that the document designer already chose a signing method for you. The **Method** field displays the selected method.

5. Click **Sign**.

The following things happen in the order below:

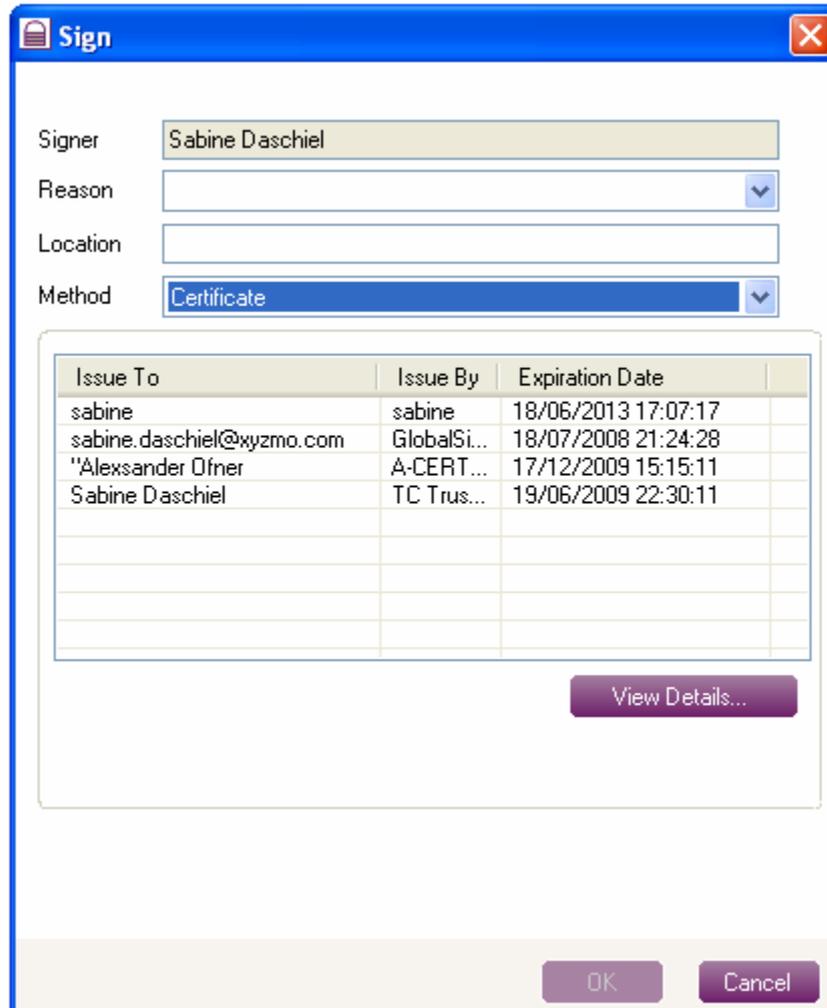
- If the selected signing method is **Tablet** or **Tablet+Certificate**, the signing area is enabled. Sign the document using a digital tablet as follows:
  1. Write your signature on the signing pad.

2. Click **OK**.

Your signature appears in the document.

- If the selected signing method is **Certificate** or **Tablet+Certificate**, SIGNificant Offline Client searches for a digital certificate on your local machine.

If the full name on the found certificate does not match your full name as specified in SIGNificant Offline Client, a list of certificates appears.



If no certificates appear, you must install a certificate. For information, see *Installing Certificates* on page 13.

Do the following:

1. Select the certificate you want to use for signing the document.

The digital certificate can be stored on the local machine or on a connected device, such as a smartcard or token. If the certificate is stored on a connected device that is configured to require a PIN, you must enter the PIN each time you sign a field using this certificate.

2. (Optional) To view the selected certificate, click **View Details**.
3. Click **OK**.

The document is signed with the digital certificate.

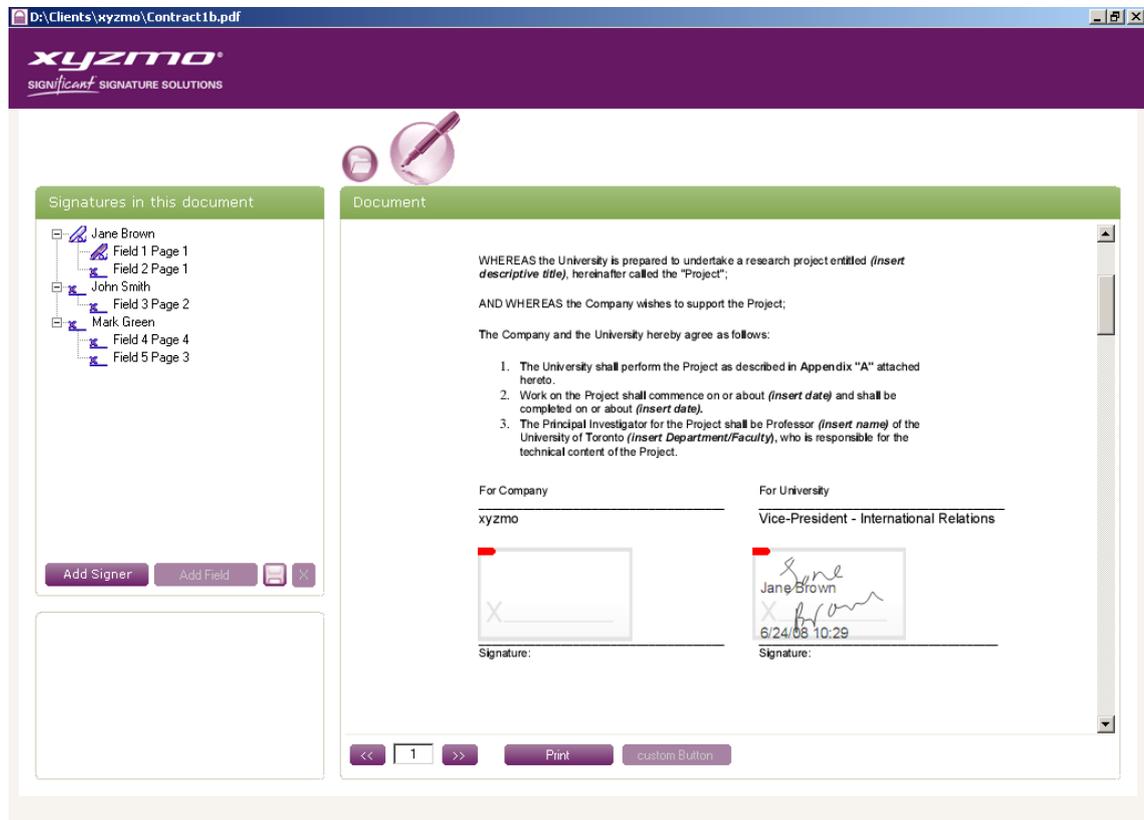
6. Click **OK**.

The following things happen in the order specified:

- If the designer specified that your signature should be authenticated biometrically, SIGNificant Offline Client connects to the SIGNificant Biometric Server and authenticates your signature.

The SIGNificant Biometric Server's response appears below the signing area.

- Your signature appears in the relevant signature field(s) in the document, along with the time and date at which you signed. The  icon appears next to your name and signature(s) in the tree.



## Signing Documents on the Fly

This procedure explains how to sign a document, in which the designer did not add you as a signer.

### To sign a document on the fly



1. Click  .  
A signature field appears in the document.
2. Drag the signature field to the desired location in the document.
3. Double-click on the signature field.

The **SIGNificant** dialog box opens displaying "Unknown signer" in the **Signer** field.

The dialog box titled "Sign" contains the following fields and controls:

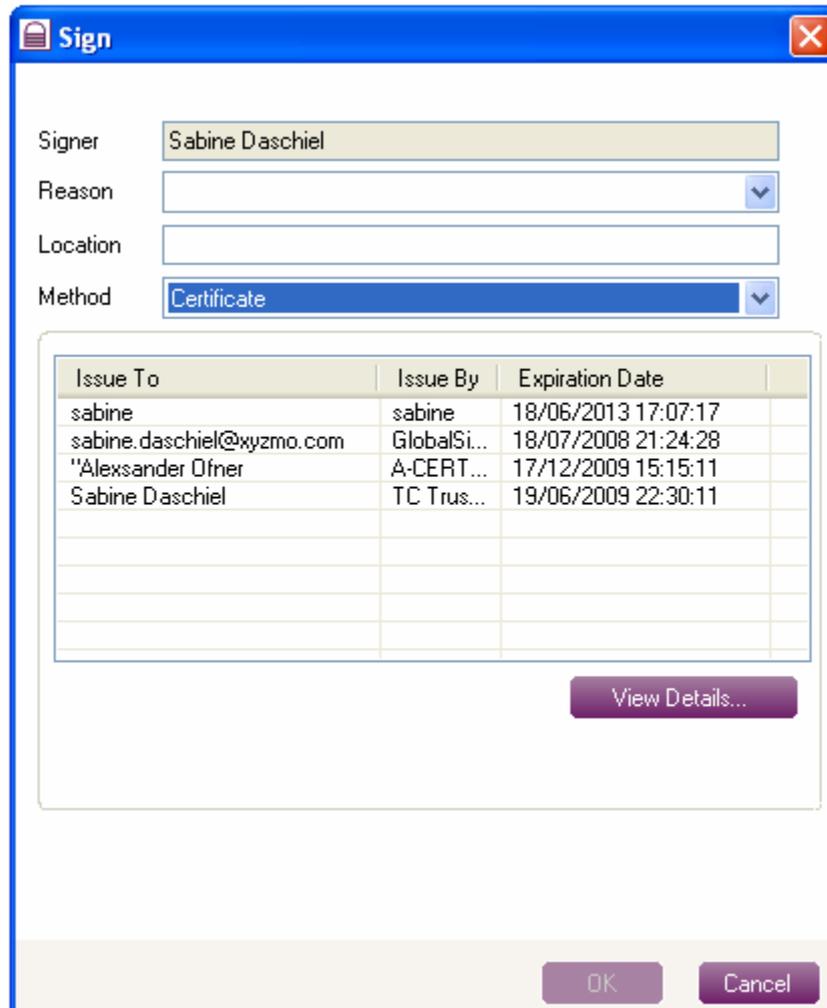
- Signer:** Text input field containing "Unknown signer".
- Reason:** Drop-down menu.
- Location:** Text input field.
- Method:** Drop-down menu set to "Certificate".
- Table:** A table with three columns: "Issue To", "Issue By", and "Expiration Date". The table is currently empty.
- Buttons:** "View Details...", "Sign", "OK", and "Cancel".

4. In the **Signer** field, type your name.
5. (Optional) In the **Reason** drop-down list, select the reason you are signing the document.
6. (Optional) In the **Location** field, type your location.
7. In the **Method** drop-down list, choose which signing method to use by doing one of the following:
  - To sign the document using a digital tablet, select **Tablet**.  
A signing area appears at the bottom of the dialog box.
  - To sign the document using a digital certificate, select **Certificate**.  
The signing area at the bottom of the dialog box disappears.
  - To sign the document using both a digital tablet and certificate, select **Tablet+Certificate**.  
A signing area appears at the bottom of the dialog box.
8. Click **Sign**.  
The following things happen in the order below:
  - If the selected signing method is **Tablet** or **Tablet+Certificate**, the signing area is enabled. Sign the document using a digital tablet as follows:
    1. Write your signature on the signing pad.
    2. Click **OK**.

Your signature appears in the document.

- If the selected signing method is **Certificate** or **Tablet+Certificate**, SIGNificant Offline Client searches for a digital certificate on your local machine.

If the full name on the found certificate does not match your full name as specified in SIGNificant Offline Client, a list of certificates appears.



If no certificates appear, you must install a certificate. For information, see *Installing Certificates* on page 13.

Do the following:

1. Select the certificate you want to use for signing the document.

The digital certificate can be stored on the local machine or on a connected device, such as a smartcard or token. If the certificate is stored on a connected device that is configured to require a PIN, you must enter the PIN each time you sign a field using this certificate.

2. (Optional) To view the selected certificate, click **View Details**.
3. Click **OK**.

The document is signed with the digital certificate.

9. (Optional) To specify that your signature should be authenticated biometrically, select the **Authenticate** check box.

This option is only available when the selected signing method is **Tablet**.

10. Click **OK**.

The following things happen in the order specified:

- If you selected **Authenticate**, SIGNificant Offline Client connects to the SIGNificant Biometric Server and authenticates your signature.  
The SIGNificant Biometric Server's response appears below the signing area.
- Your signature appears in the document, along with the time and date at which you signed. The  icon appears next to your name and signature in the tree.

## Clearing Signatures

You can clear (remove) specific signatures or all of a specific signer's signatures.

---

**Note:** Clearing a signature does not remove the related signature field.

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### ***To clear a specific signature***

- In the tree, right-click on the desired signature field and click **Clear** in the pop-up menu that appears.  
The signature is removed from the document, and the  icon appears next to the signature field.

### ***To clear all signatures for a signer***

- In the tree, right-click on the desired signer and click **Clear** in the pop-up menu that appears.  
All of the signer's signatures are removed from the document, and the  icon appears next to the signer and their signature fields.



## Printing Documents

You can print a document at any time during the signing process or when all signatures are complete.

### ***To print a document***

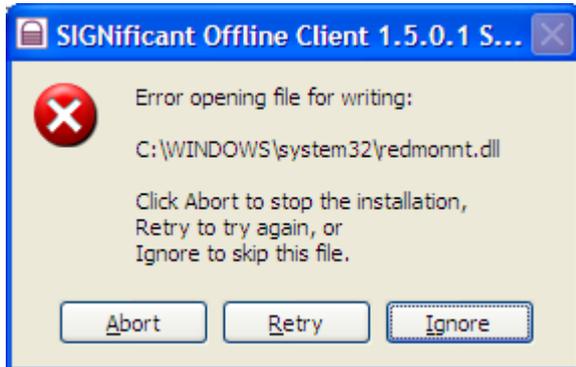


1. Click  .  
The **Print** dialog box opens.
2. In the **Name** drop-down list, select the desired printer.
3. Click **OK**.  
The document is sent to the printer.

## Troubleshooting

The following chapter is organized as an FAQ.

### Installation Error: “Error opening file for writing”



During installation you may see this error if you have a product installed on your PC which also uses this DLL (e.g. the SIGNificant Online Client). In this case simply click on “Ignore” to continue. The installation will work fine.

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