PrizmDoc Viewer End User Guide

Purpose

Welcome to the PrizmDoc Viewer End User Guide. This guide details how to use the features available in the Viewer and E-Signature module. The content is made available in both PDF and MS Word format so that you can update and distribute as needed. The content was updated on April 7, 2022 and may not be updated in the future. For more information on the PrizmDoc Viewer product and available APIs, refer to the latest PrizmDoc Viewer product help.

Table of Contents

End User Guides

The Viewer is a web application, running in your web browser, that allows you to view and annotate most documents, including Microsoft Office and Adobe PDF, without requiring these applications to be installed on your device.

PrizmDoc Viewer is designed to run on every type of computing device, from desktops and laptops to tablets/iPads and even mobile phones - anything with a modern web browser should work. The design of the user interface will adapt to the different sized screens and input methods (mouse, touch) across each of these devices, making it easy to work where and how you wish.

The following sections contain detailed information about the various Viewer features available in PrizmDoc Viewer and how to use them to increase your productivity:

- The Viewer - The Viewer is a web application, running in your web browser, that allows you to view and annotate most documents.
- E-Signature - The E-Signature module opens up a set of PrizmDoc Viewer workflows based on forms stored in file formats supported by PrizmDoc Viewer. As with the Viewer, the E-Signature module works in your website to empower your customers as you see fit.

Viewer Guide

This section contains the following information:

- Overview
- How To Examples
    - View Documents
        - Compare Documents
        - Use Image Tools for Viewing
        - Use Text Selection Options
        - View Embedded Hyperlinks
        - Work with Thumbnails
        - Work with Email Attachments
    - Search Documents
        - Search Box and Icons
        - Search Patterns, Filters & Document Review Features
        - Use the Fixed Search Terms Feature
        - Use the Proximity Search Feature
        - Redact Search Results
    - Annotate Documents
        - Create Image Stamp Annotations
        - Create a Polyline Annotation
        - Create a Strikethrough Annotation
        - Create a Text Hyperlink Annotation
        - Use Annotation Layers
            - Work with Annotation Layers
            - Load Annotations

Overview

Overview

This section provides an overview of the Viewer so you can learn about using the functionality quickly and easily.

- What is the Viewer?
- Understanding the User Interface
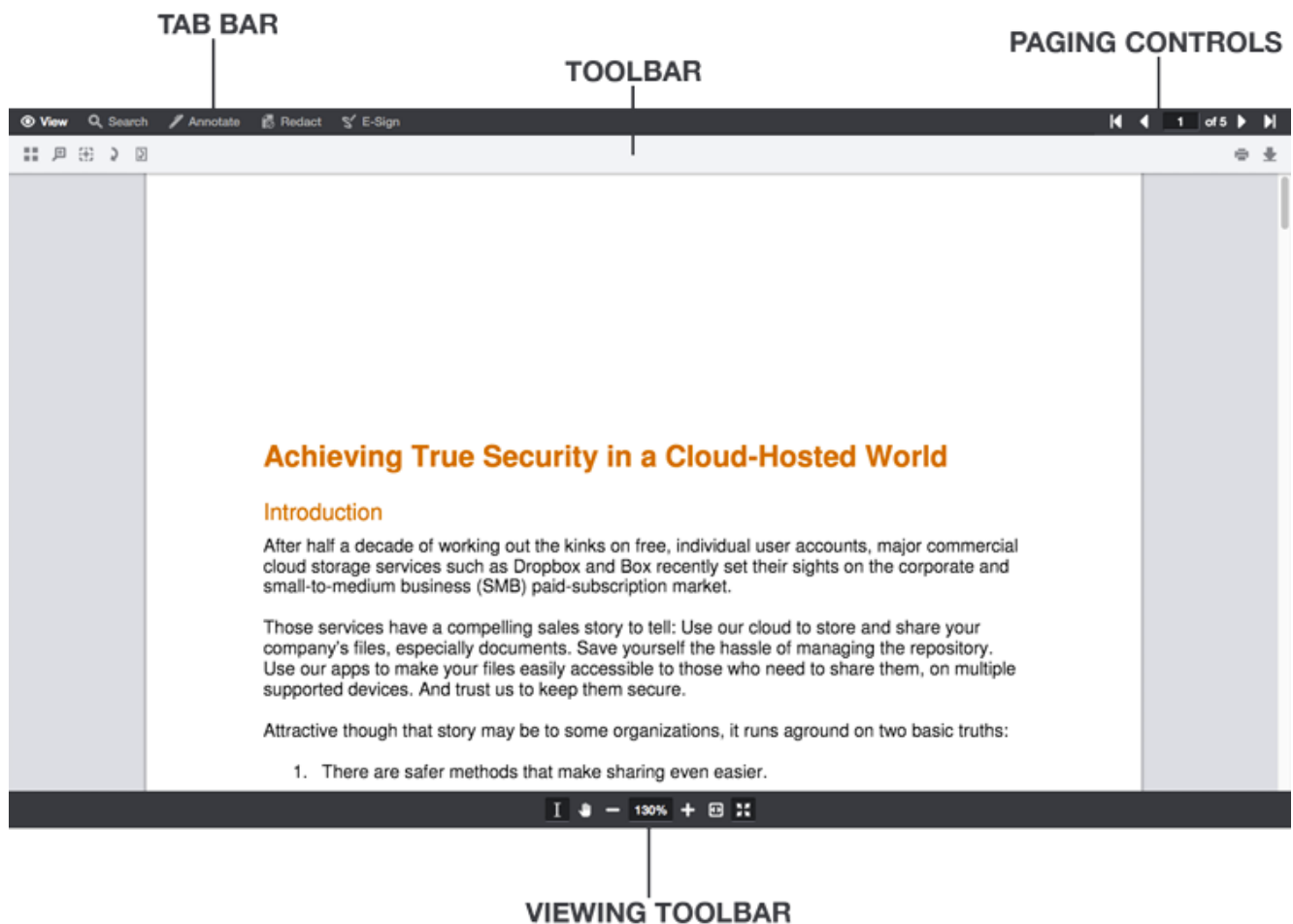- Viewing Documents
- Interacting with Documents

What is the Viewer?

The Viewer is a web application that lets you view, search, and annotate a large number of document types, including Microsoft Office, Adobe PDF, and more. The Viewer is designed to work on any device with a web browser, including desktop and laptop PCs, tablets and smartphones, and will work using a keyboard and mouse or touch input, all without installing a dedicated app.

Understanding the User Interface

Here is an example of how the Viewer looks:

Viewing Documents

Once a document is loaded in the Viewer, you have the standard features for reading a document, as well as some more advanced features. You can scroll freely through the document, navigate between pages using paging controls, select text, and zoom in and out using a variety of tools, so that you can examine the document in greater detail.

Moving Between Pages

The Viewer's paging controls let you move between pages. Clicking the buttons on the left and right will take you to the first and last page, respectively. The other two buttons will take you back and forth one page at a time. If you want to jump to a specific page, enter the page number into the center input field, and press Enter.

Zooming & Panning
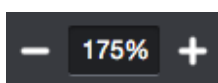
To zoom in or out, press the plus and minus buttons at the bottom of the Viewer. If you need to zoom at a larger increment, press the zoom percentage to see a list of zoom levels:

Choose from the list of percentages, or choose Full Width (zoom to the page width), Full Height (zoom to the full page height), and Full Page (make the entire page fit in the Viewer).

For very precise zooming, the Viewer has Magnifier and Rectangle Zoom tools:

The Magnifier tool acts like a magnifying glass on a paper document. Selecting this tool, and pressing within the document will magnify that portion of it to see more detail. The Rectangle Zoom tool enables you to press and drag a rectangle around a portion of the document you want to zoom in on. This lets you choose the exact portion of the document you want to focus on.

The Pan tool lets you move the view in a different direction, which is very helpful when you're zoomed in and can't see your whole document. The Pan tool is located at the bottom of the viewer next to the zoom controls:


With the Pan tool active, press and drag the cursor in any direction to pan around the document area.

Page Thumbnails

To see an overview of your document, you can open the Thumbnails panel in the View tab to see small versions of every page in the document:

Once this panel is open, you can scroll through all of the pages, and press a thumbnail to immediately jump to that page. There's a slider at the top of the panel that will increase or decrease the size of the thumbnails if you would like to see more or less detail in the thumbnails:
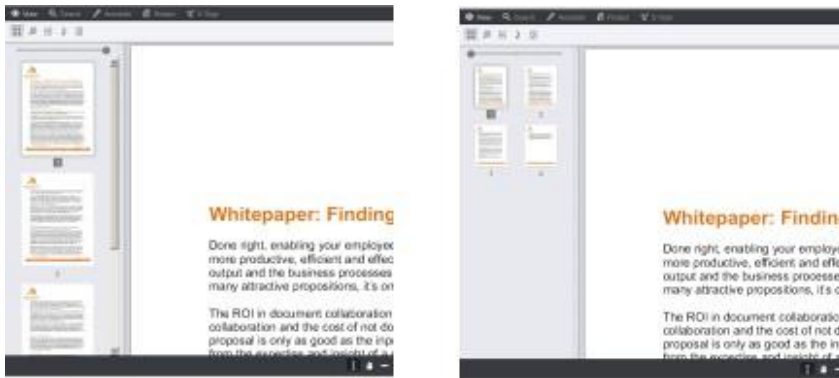
Interacting with Documents

In addition to being able to view documents, you are also able to draw annotations, redact content, add e-signatures, download, and print documents all without altering the original.

Selecting Text

The Text Selection tool allows you to select text and perform common operations on your selection via the Immediate Action Menu (IAM).
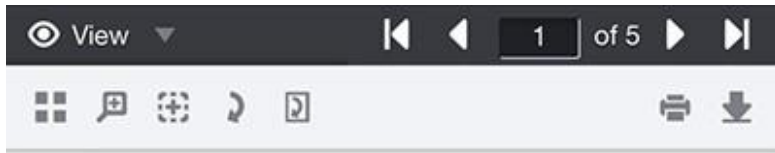

Once selected, press and drag the cursor to select text on a page. When you're finished, release the cursor. If you're using a mouse, a small rectangle with a menu icon appears:
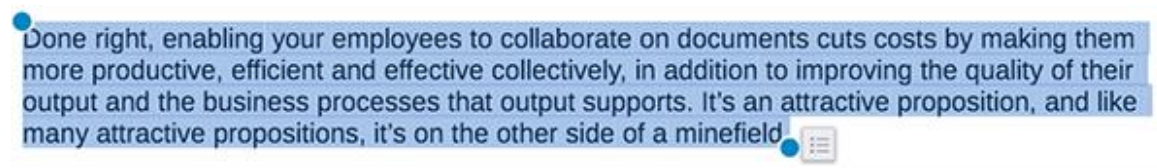
Hover over this small rectangle, and you will see a list of common actions to perform with this text like Copy, Highlight, Redact, and more:

On touch devices, when you release the cursor the IAM will appear at the bottom automatically:

You can choose one of the actions, or press Cancel at the bottom to dismiss the menu.

You will also notice blue text selection handles around the text. If you would like to modify your selection, these handles can be dragged separately to change the selected text.

Searching

The Viewer contains a powerful search feature that will let you find words, phrases, and common bits of content like email addresses and postal codes. Opening the Search tab will display a search input box and search operators like match whole word, match case, and proximity search:
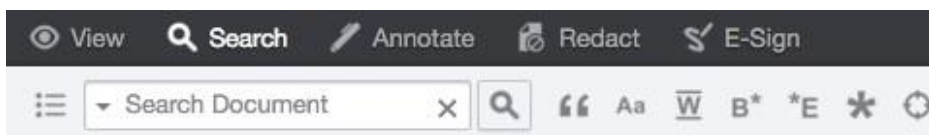

Enter a search term into the input box, and press the Search button or press Enter. The search results panel will open, displaying the search results. The search term(s) will also be highlighted on the document itself:
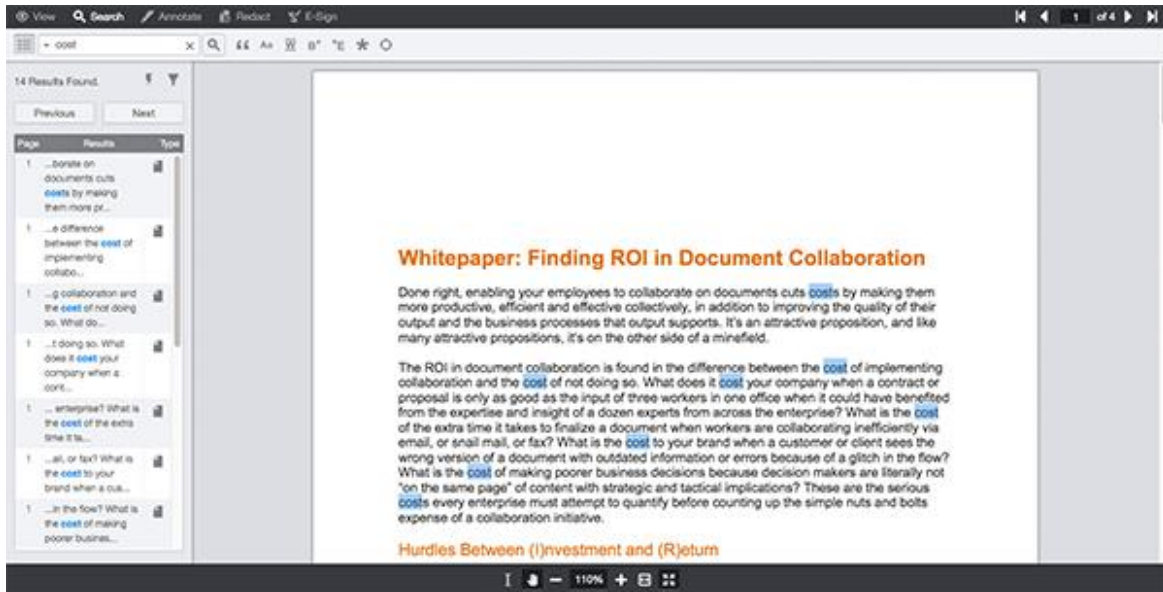
For more detailed information on searching, refer to the topic: Working with PrizmDoc Viewer > Viewer End-User Guides > Viewer Guide > Search Tab.

Annotating Documents

The Viewer allows you to mark up documents using three different categories of annotations: drawing, text, and image. Opening the Annotate tab will show you all various annotation types you can use:
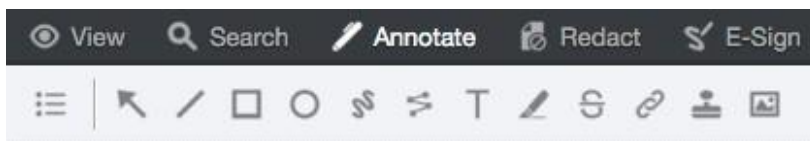
Using these tools, you can add a variety of shapes, highlight text, create links to websites, add images, and more. To add an annotation, press the button for the mark you would like to add. Depending on which tool you've chosen, you might press and drag to add a shape anywhere on the document and of the size you need, or you might select a block of text to add a strikethrough.

Once you have added an annotation, a context menu will appear letting you change different settings for that mark:
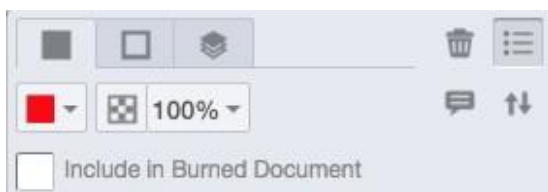
Depending on the mark type, you can change things like color, border thickness, opacity, and layer order, or remove it from the document.

Redacting Content

For those working with sensitive content, the Viewer's ability to redact content is a powerful feature. More than simply hiding content visually, once a document with redactions is exported or "burned," the redacted content is securely removed from the resulting document. Opening the Redact tab gives you access to three different ways to create redactions:
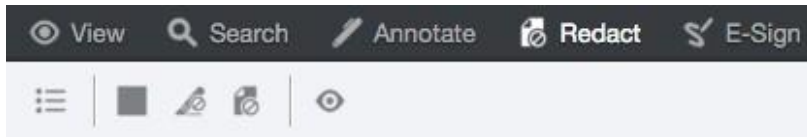
You may draw redactions of any size you need, create redactions from selected text, or add redactions to an entire page or range of pages, depending on your needs. Like annotations, redactions have a context menu that gives you access to settings like fill color, border color, and the chance to add text giving the reason why content has been redacted.

E-Signing

The Viewer's E-Sign tab allows you to sign, initial, and date documents electronically for convenient signing of important documents, removing the need to print, sign, scan, or fax paper copies:
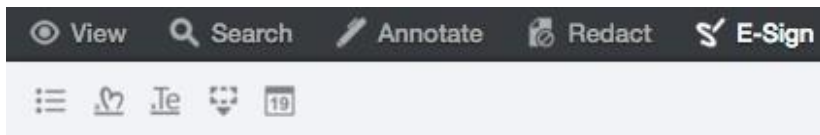
You can draw your signature or initials for use in a document, or type it and choose a stylized font for your signature and initials. All signatures can be saved for use later, and reused among many documents, allowing for fast and easy e-signing. Once created, you can add a signature to the document, and size it and place it anywhere a signature is required. You can also quickly add today's date with the Date tool:

Commenting

After annotations, redactions or e-signatures (collectively known as "marks") have been added to a document in the Viewer, it's possible to add, reply, and view comments associated with them.

Adding Comments

To add comments to marks, select the object (whether it be an annotation, redaction, or e-signature) to show the context menu. Pressing the comment button on the context menu will open the add comment dialog. Type into the input field, and press Done to add your comment (or cancel if you no longer want to add a comment):
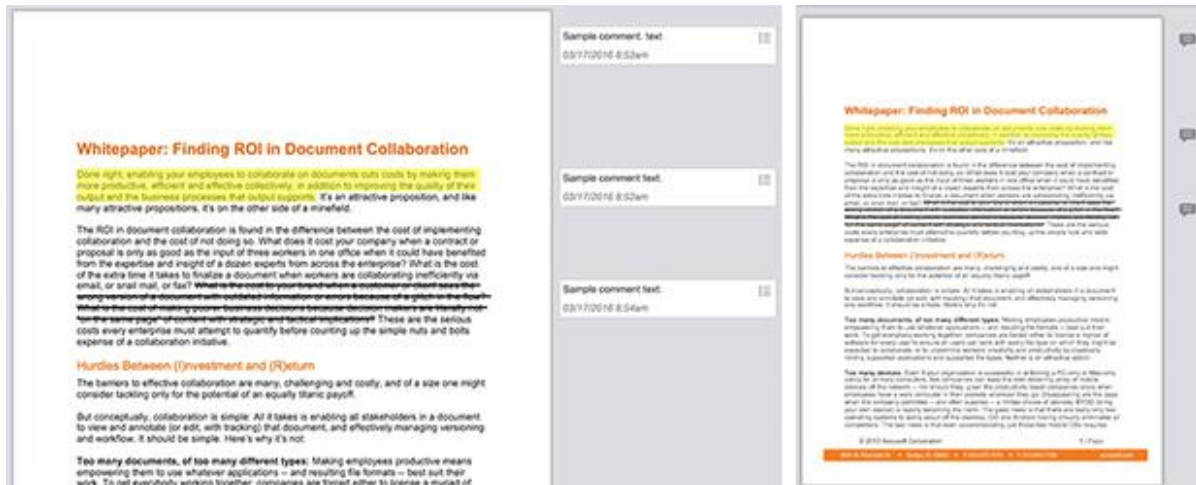

Viewing Comments

To see the comments you or others have added to a document, press the comments button in the toolbar:

Depending on your screen size or your application's configuration, you will see all comments displayed in full, or in "skinny" mode, where comments are indicated by an icon and are shown only when the indicator is pressed:

To hide the comments, press the comments button in the toolbar again.

Printing

Documents can be printed from the Viewer with standard printing options like page size and orientation, as well as options for including annotations, redactions and comments. To start the printing process, press the Print button in the toolbar:

Standard printing options like page size and which pages to print are shown first. If you would like to see additional options, press the More options button:
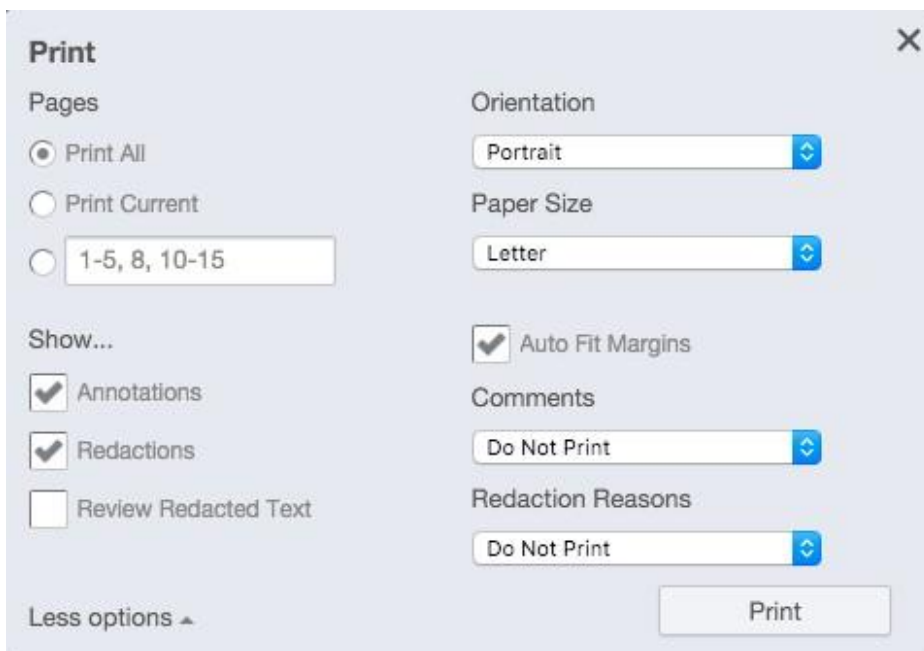
Select any of the options you need, and press the Print button. The Viewer will prepare the document for printing and launch your web browser's print window to finish the process.

Downloading

To download documents, you can press the Download button in the toolbar to open the download panel:

In the download panel, you can choose which document format you want to download, which marks you would like to include (if any), and the chance to preview what the downloaded document will look like:

Once you have chosen the download options that meet your needs, press the Download button to start the download process. When the new file is ready to download, you will see a Save button. Pressing this button will let you save the new file to your device.

For more details on how to use the Viewer, refer to the section: Viewer Guide.

How To Examples

This section contains detailed information on how to use the Viewer features:

- View Documents
  - Compare Documents
  - Use Image Tools for Viewing
  - Use Text Selection Options
  - View Embedded Hyperlinks
  - Work with Thumbnails
  - Work with Email Attachments
- Search Documents
  - Search Box and Icons
 - Search Patterns, Filters & Document Review Features
  - Use the Fixed Search Terms Feature
  - Use the Proximity Search Feature
  - Redact Search Results
- Annotate Documents
  - Create Image Stamp Annotations
  - Create a Polyline Annotation
  - Create a Strikethrough Annotation
  - Create a Text Hyperlink Annotation
  - Use Annotation Layers
    - Work with Annotation Layers
    - Load Annotations
    - Save Annotations

- Redact Documents
  - Create a Full Page Redaction
  - Use Redaction Reasons
- Use the Comment Feature
  - Use Annotation Comments
  - Use E-Signature Comments
  - Use Redaction Comments
  - Use Skinny Comments
- Print Documents
  - Print Non-standard Size Documents
- Download Documents
  - Downloading the Original Document
  - Burning Annotated Content in the Viewer
  - Burning Redacted Content in the Viewer
  - Burning Signed Content in the Viewer

View Documents

This section contains topics that demonstrate the viewing tools including paging, zoom controls, fit options, thumbnails, email attachments, and page rotation:

- Compare Documents
- Use Image Tools for Viewing
- Use Text Selection Options
- View Embedded Hyperlinks
- Work with Thumbnails
- Work with Email Attachments

Compare Documents

You can use the Comparison Viewer to upload two Word documents and compare them so you can see the changes between them. The changes can include formatting modifications such as font or spacing changes, grammatical changes, or the addition or deletion of words, sentences, clauses or paragraphs.

> 💡 Note that you must have a Microsoft Office enabled PrizmDoc Viewer license to use the Comparison Viewer. Currently, only Word documents are supported.

To use the Comparison Viewer:

1. Click on the **Comparison Viewer** tab:
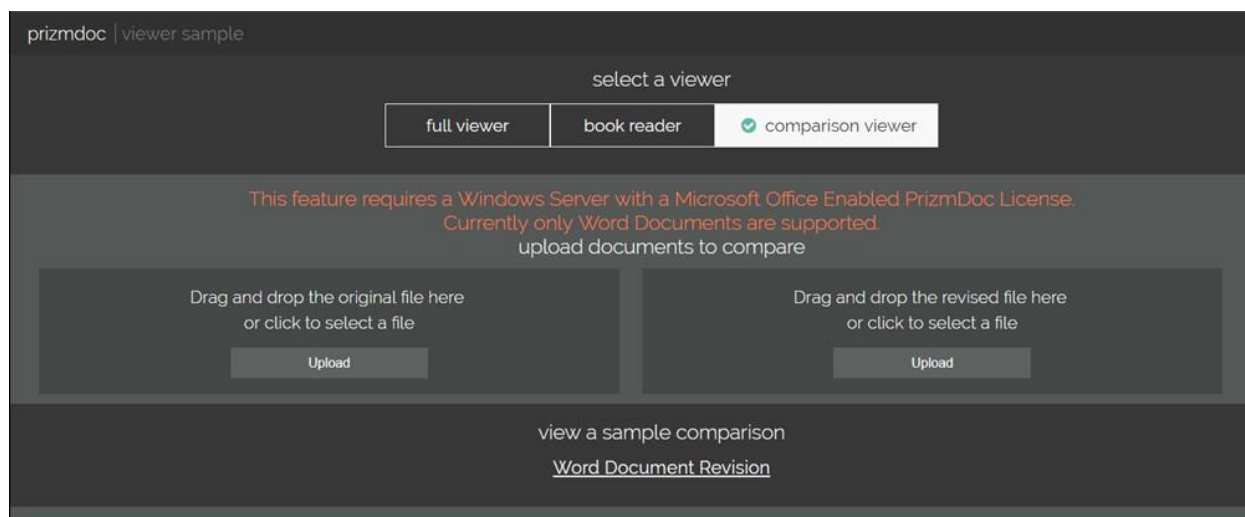
2. Click the **left Upload** button to select your original document:
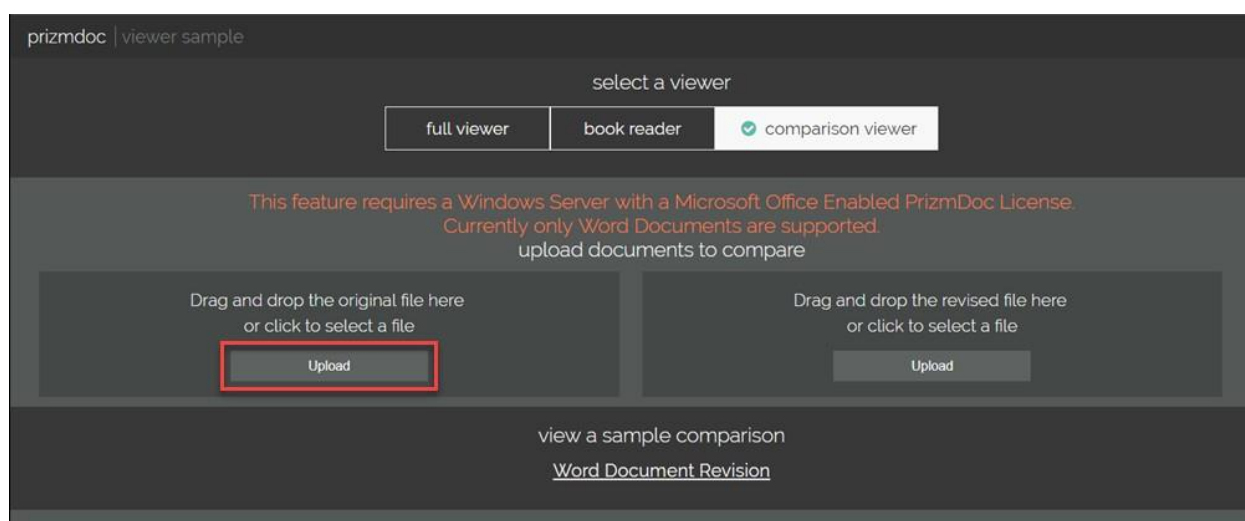
3. Click the **right Upload** button to select your revised document:
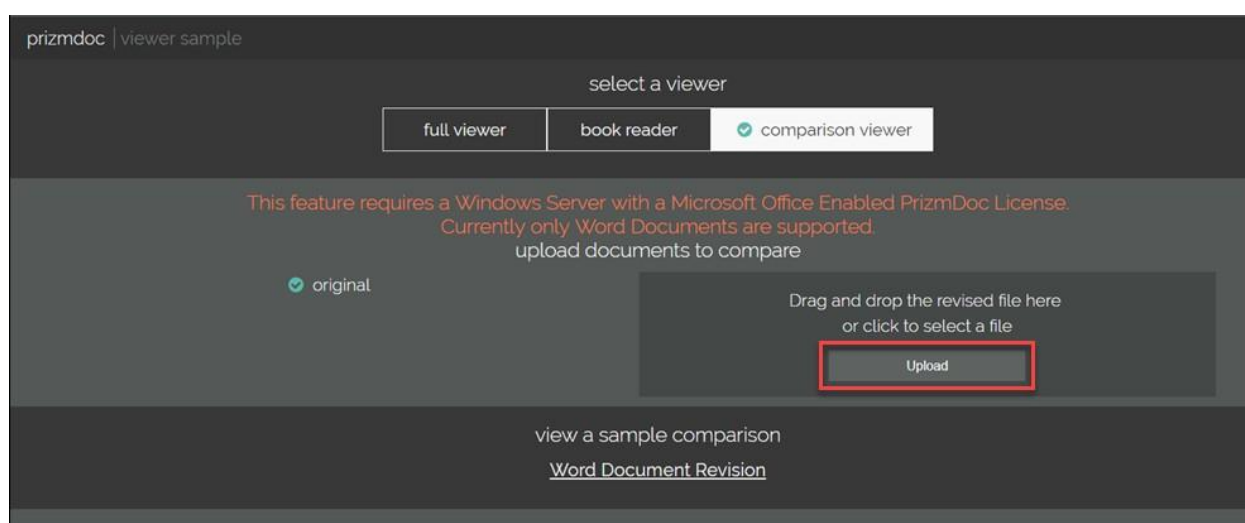
4. The Comparison Viewer displays the changes between the two documents. You can still use the View tab features:
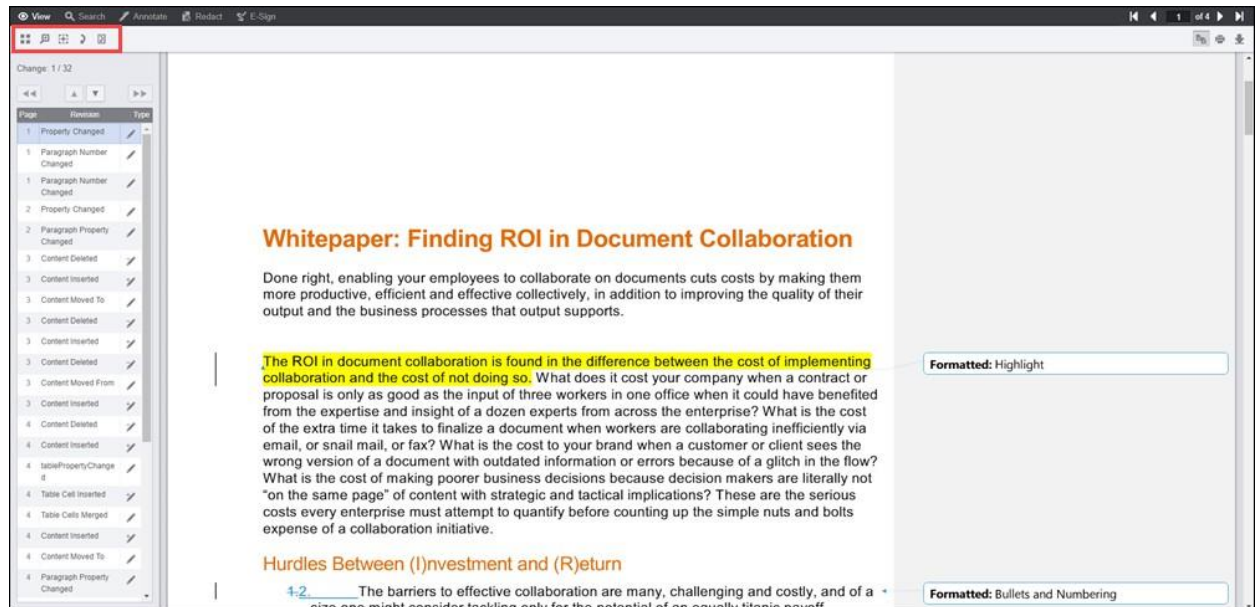
5. To review the changes, you can click directly on the **revision** in the results panel or click on the **Up** or **Down** arrows on the left side of the Comparison Viewer:
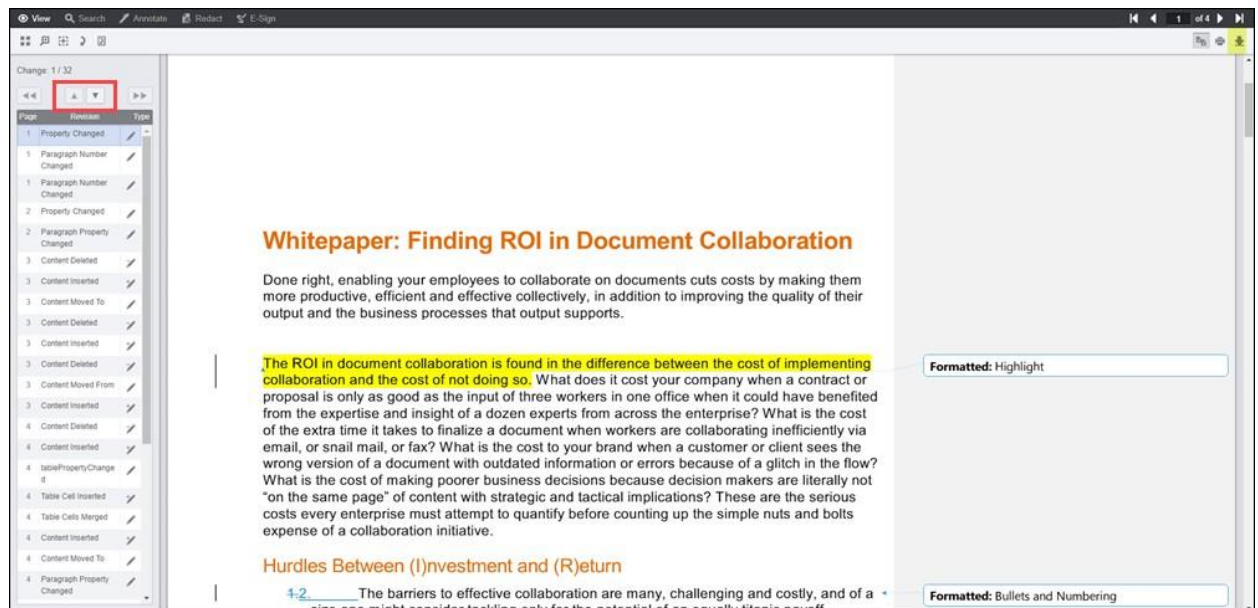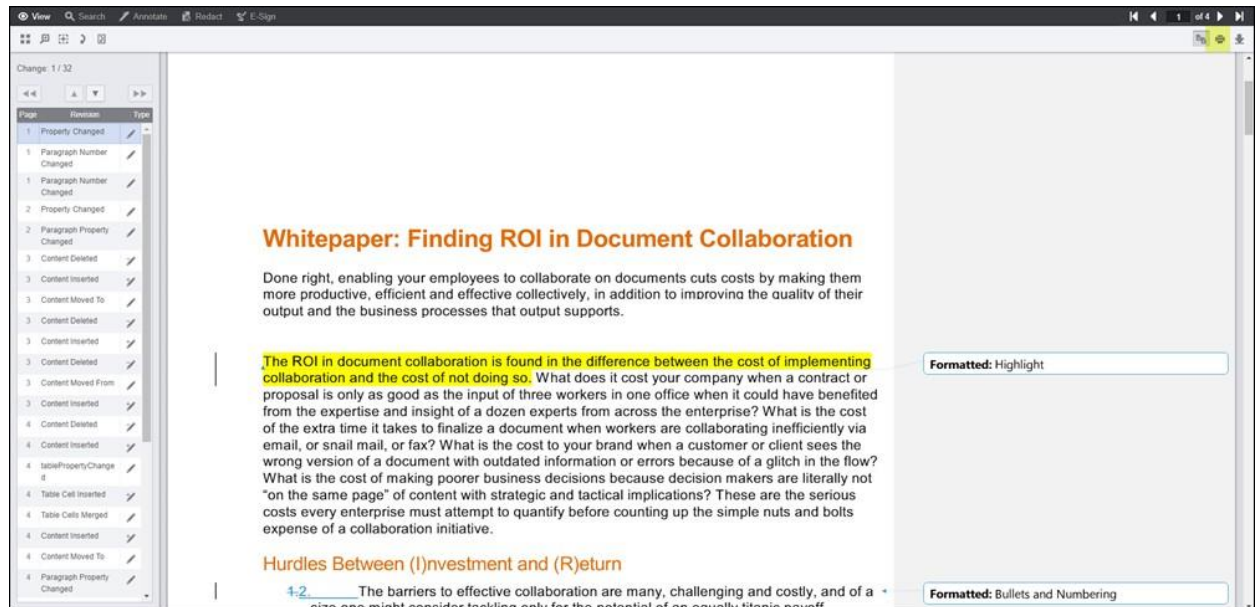

6. To toggle the results panel on or off, click on the **Document Comparison** icon on the upper right of the Viewing tab:
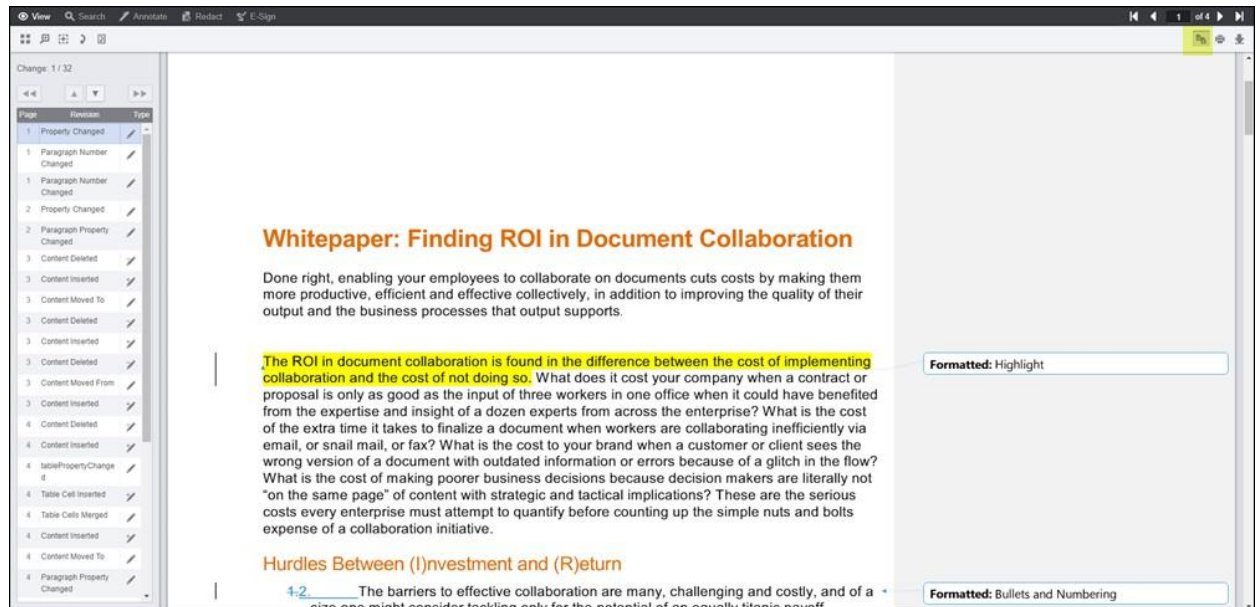
7. You can use the other Viewer features with this document, such as **Search**, **Annotate**, **Redact**, and **E-Sign**:
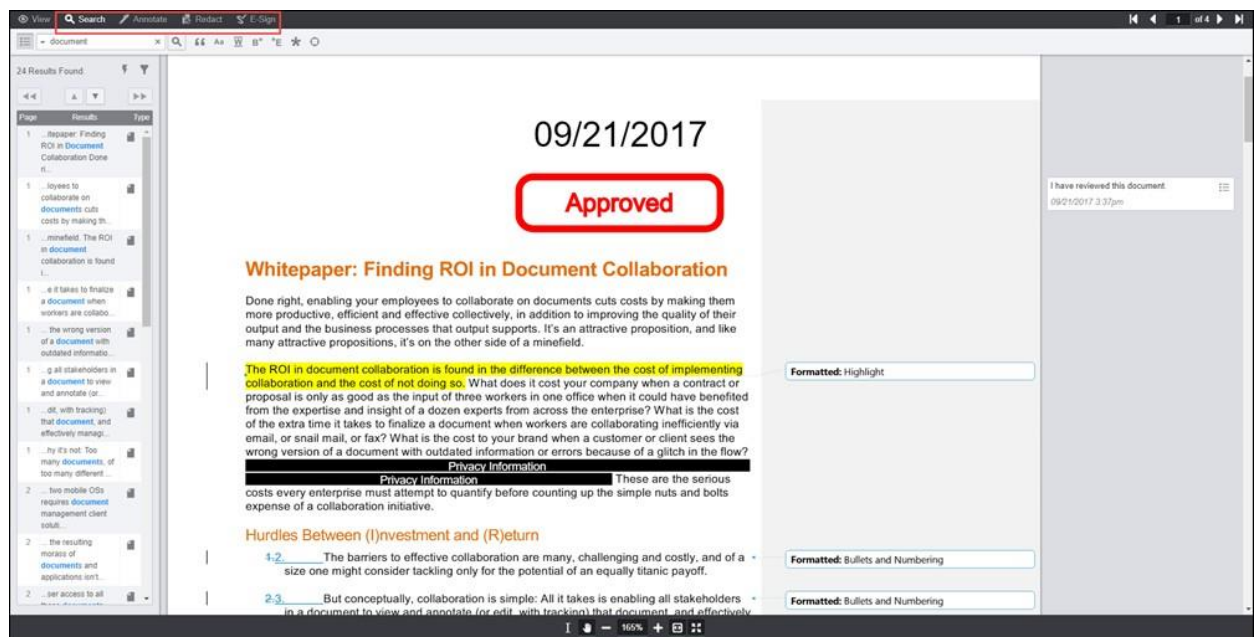
8. To print the document with the revisions included, click on the **Print** icon on the upper right on the Viewing tab:

9. To save the document with the revisions included, click on the **Download** icon on the Viewing tab:
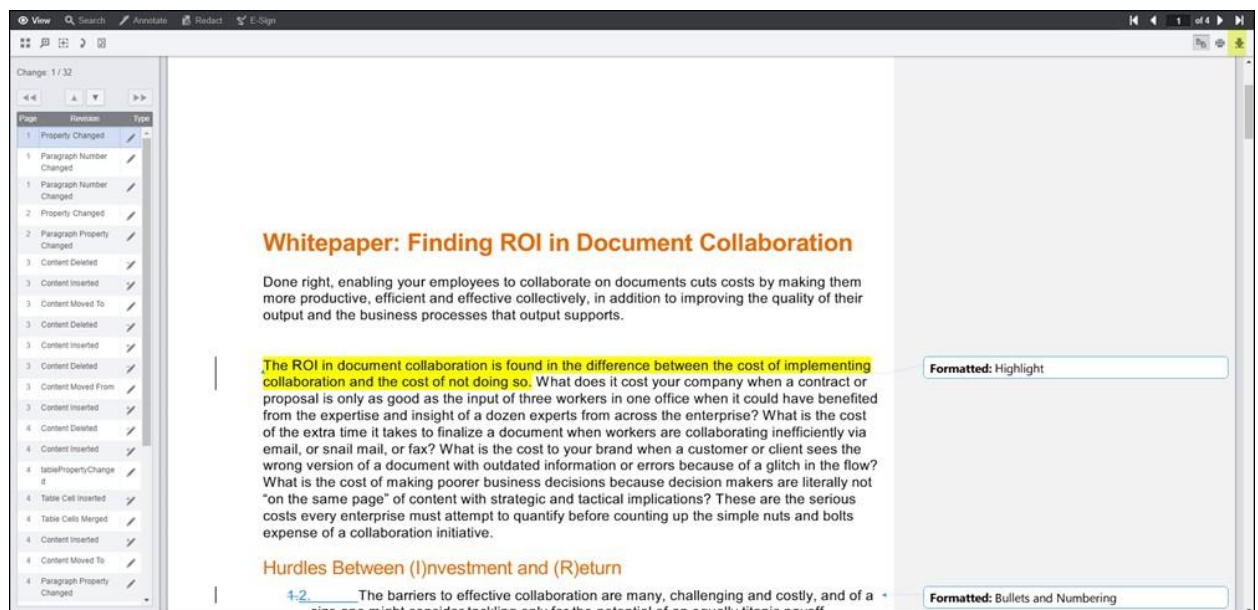
10. To compare other Word documents, close the **Comparison Viewer** and repeat the steps above. Alternatively, you can use the **View a Sample Comparison** as shown below to view a sample Word document with revisions:
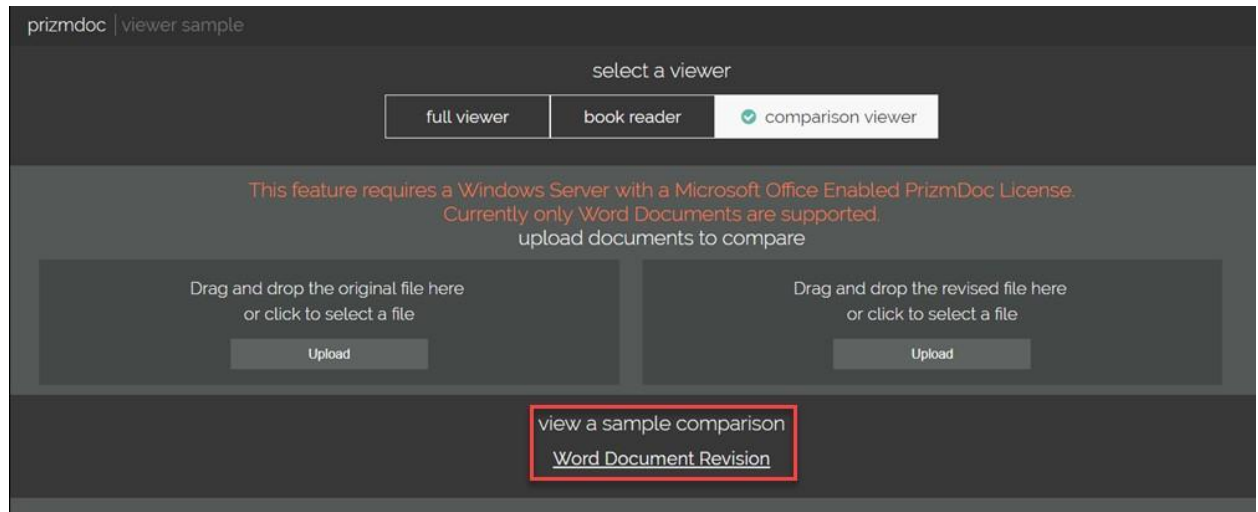
Use Image Tools for Viewing

The Image Tools icon is available on the View tab:
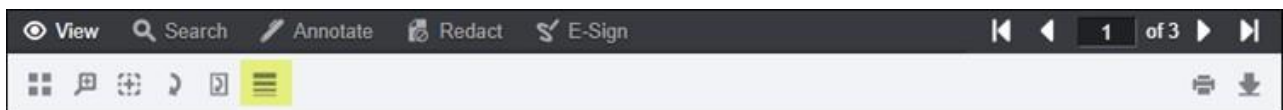
The Image Tools feature allows you to adjust the clarity of the document you are viewing:

- **Sharpening** - on a scale of 0-100, you can adjust the slider to sharpen lines.
- **Gamma** - on a scale of 0-10, you can adjust the slider to increase or decrease gamma.
- **Line Width** - on a scale of 1-100, you can adjust the slider to increase or decrease line width.

> 💡 Image Tools are available for viewing only. If you print or save the file after applying any of the Image Tools, you will not see the changes on the printed or saved file.

To use the Image Tools for viewing:

1. If you have documents that you want to adjust the content for clarity, for example, like the following architectural drawing:
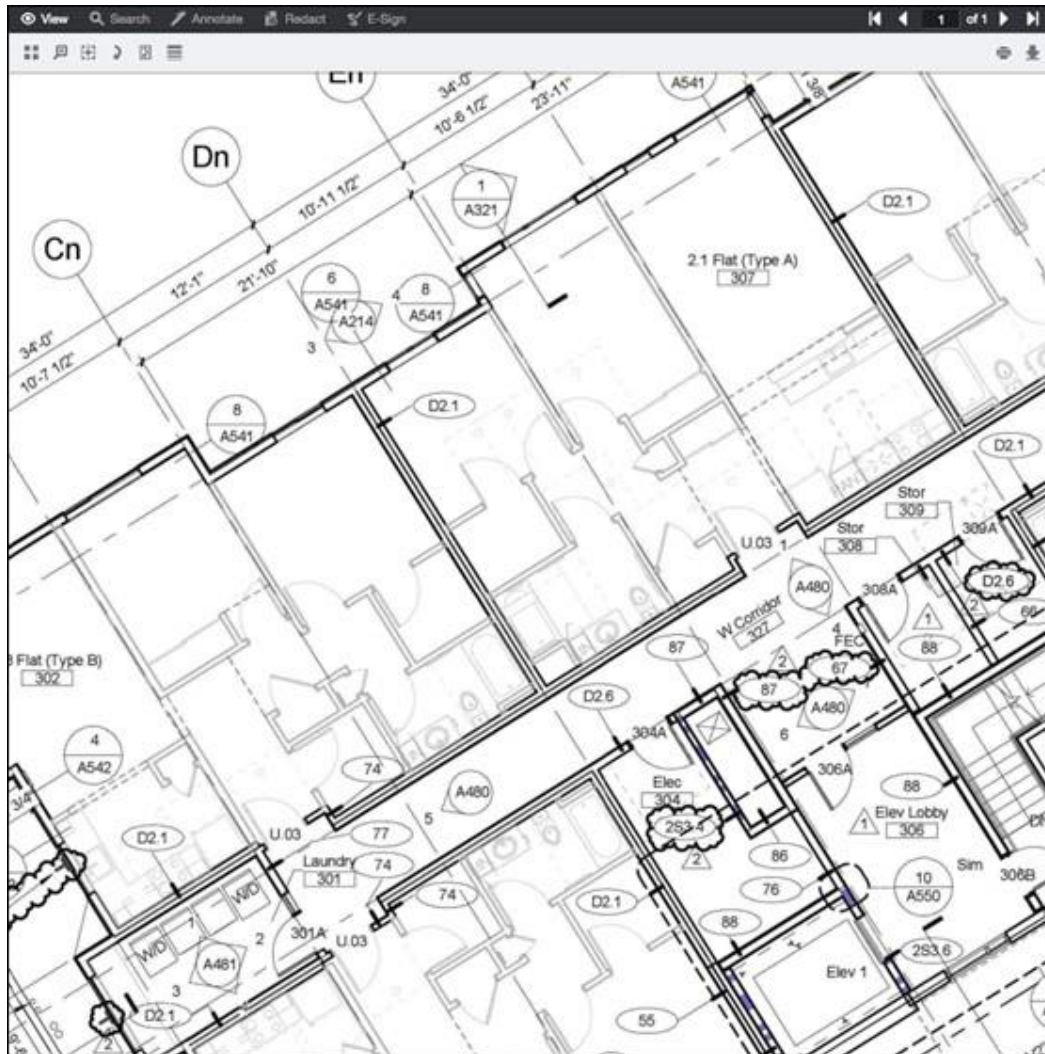
2. Click on **Image Tools** and the slider displays:

3. Click on each slider and adjust it until you are satisfied with the clarity:
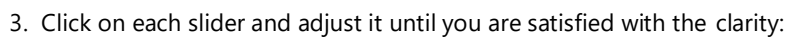
4. The slider will remain open while you scroll through the document. If you click on the document or click on another tool, the slider will close.

Demo of Image Tools

The following example shows how the Image Tool feature works to improve your document viewing experience:

Line Drawing
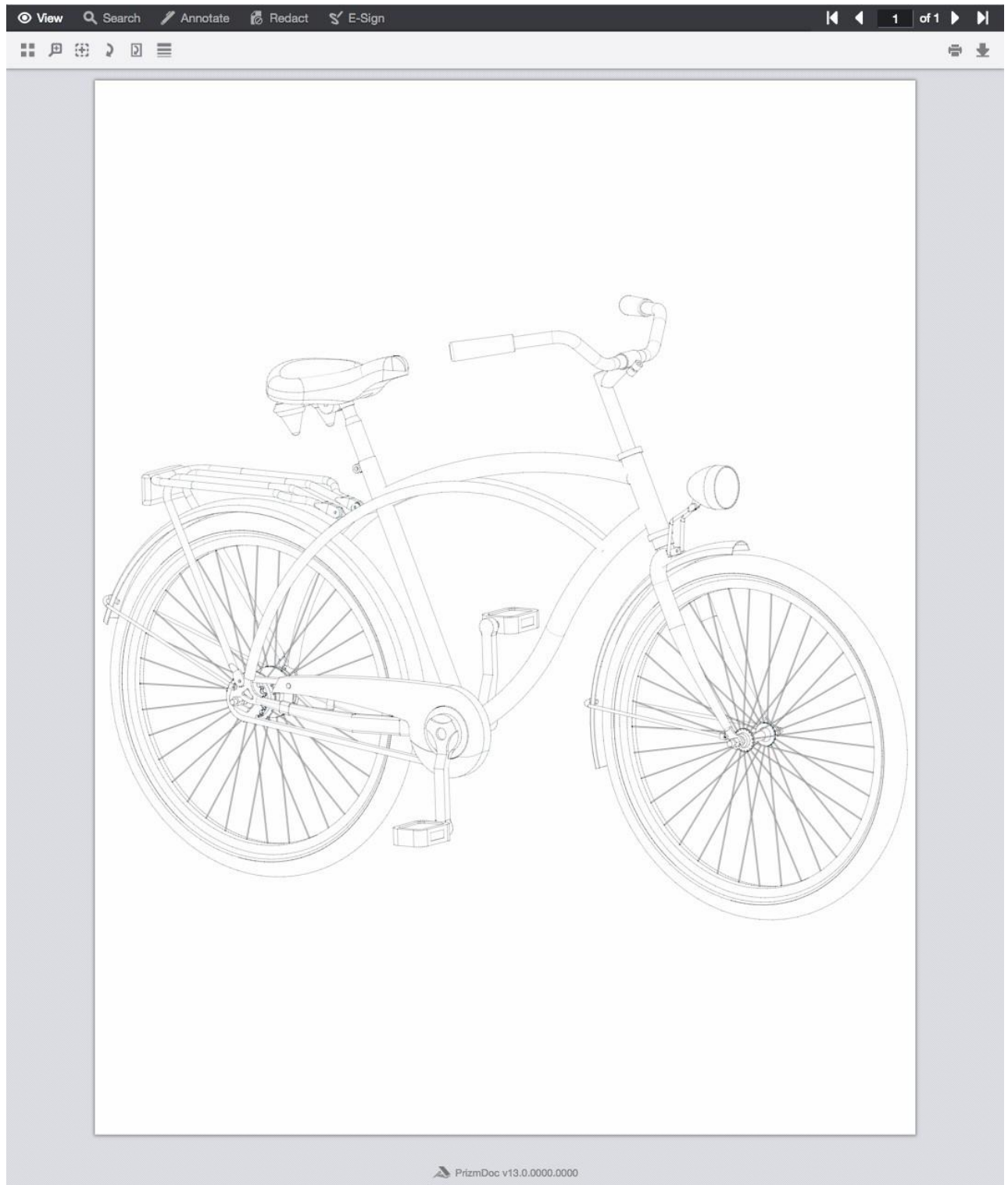
Use Text Selection Options

The Text Selection Mouse Tool is available at the bottom of the Viewer and allows you to Select Text, Pan, Zoom Out, select viewing options including Percentage, Full Width, Full Height, and Full Page, Zoom In, Fit Content and Full Screen:
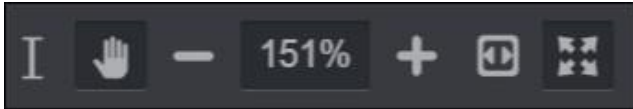
Text Selection provides options to select text, Copy, add a Highlight annotation, Redact text, or add a Hyperlink annotation from the Context Menu. You can easily modify your text selection by using either touch or mouse:
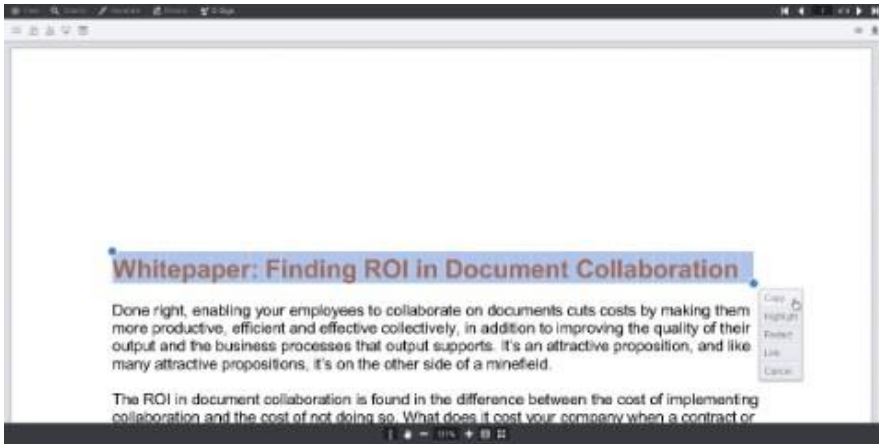
Sections in this topic:

- Adding a Highlight Annotation
- Redacting Text
- Adding a Hyperlink Annotation
- Copying Text (non-touch device)
- Copying Text (touch device)
- Copying Text (Android device)

Adding a Highlight Annotation

To add a Highlight annotation to text in the document:

1. Click on the **Text Selection** mouse tool:
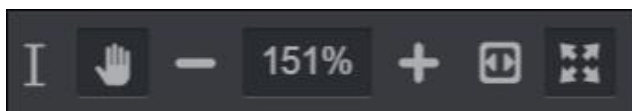
2. Select the **text** you want to highlight and the Context Menu displays:
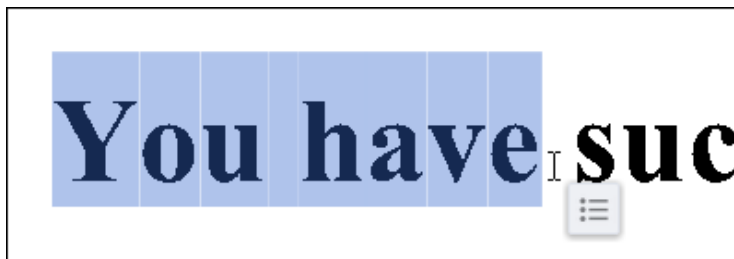
3. Hover over the **Context Menu** and select **Highlight**:
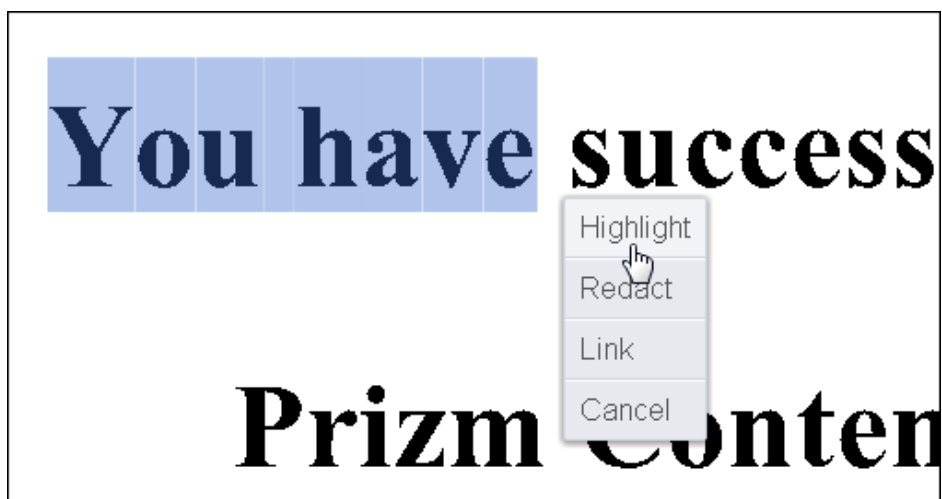
4. The text in your document is now highlighted. Another Context Menu displays:
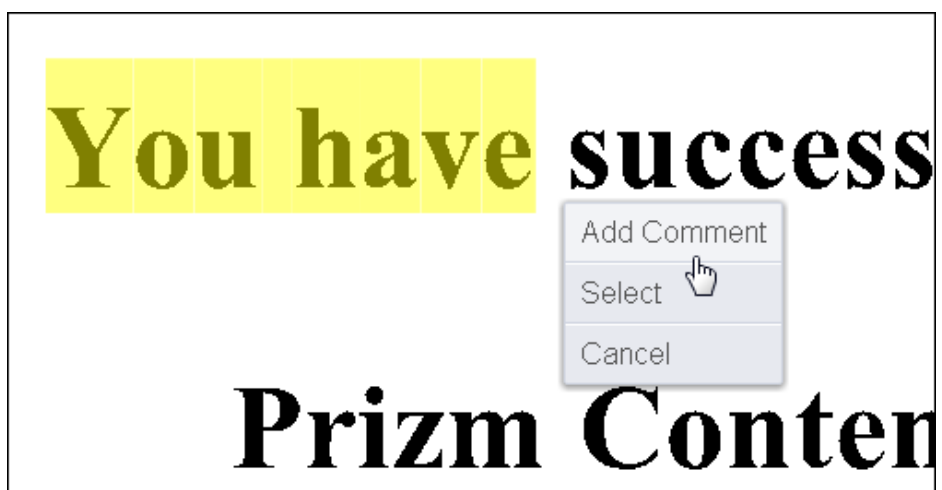
5. You can **Add Comment**, **Select** the annotation or **Cancel**.

Redacting Text

To redact text in the document:

1. Click on the **Text Selection** mouse tool:
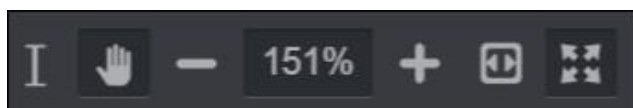
2. Select the **text** you want to redact and the Context Menu displays:
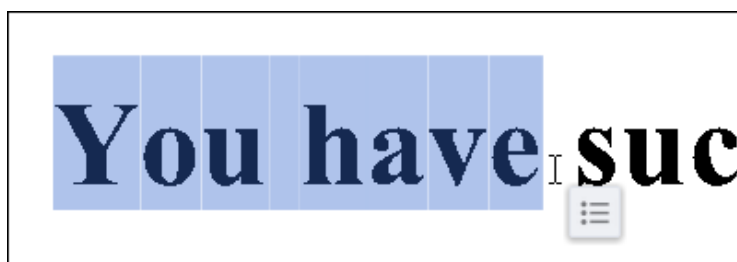
3. Hover over the **Context Menu** and select **Redact**:
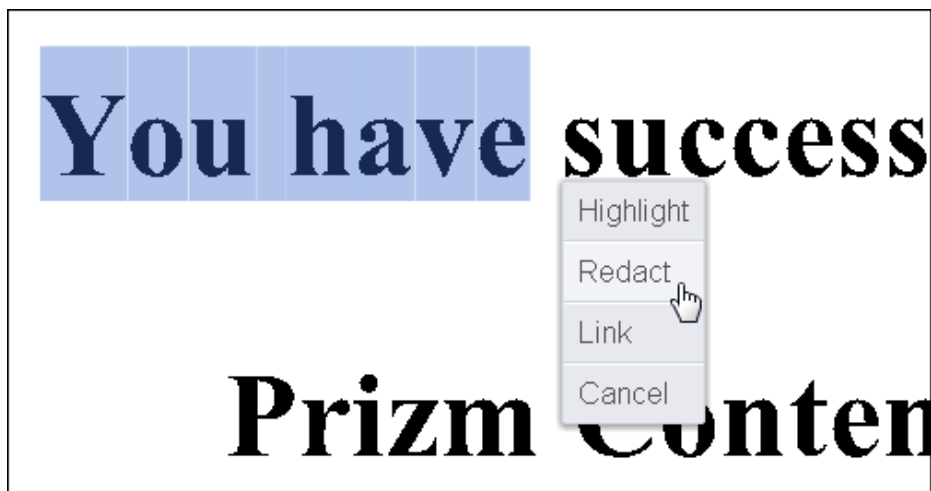
4. The text in your document is now redacted. Another Context Menu displays:

5. You can **Add Comment**, **Select** the redaction, **Cancel** or **Apply a Redaction Reason**.

Adding a Hyperlink Annotation

To add a Hyperlink annotation in the document:

1. Click on the **Text Selection** mouse tool:
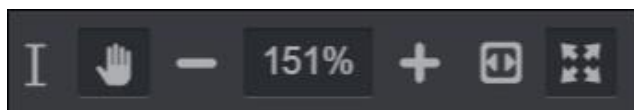
2. Select the **text** you want to add a hyperlink to and the Context Menu displays:
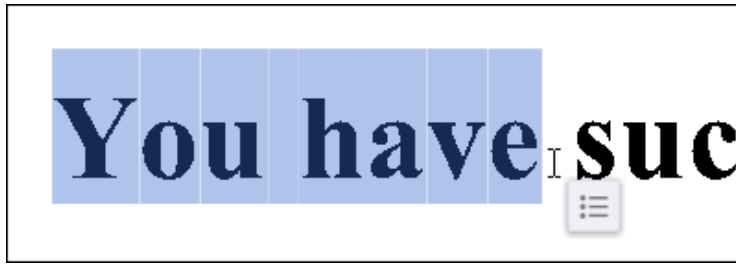
3. Hover over the **Context Menu** and select **Link**:
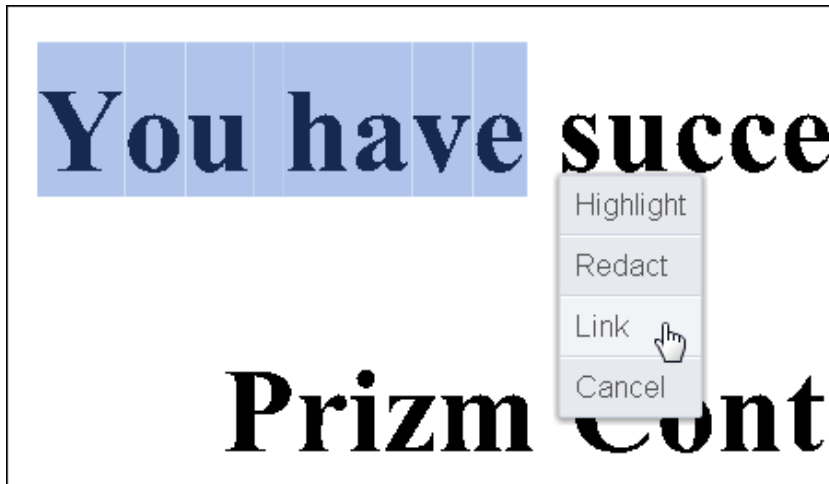
4. The Hyperlink text box displays. Enter the **web address** you want to link to and click the **Checkmark icon**:

5. Click on the **Hyperlink text annotation** and the Comments Menu displays. You can **Visit the Link**, **Add a Comment**, **Edit the Link**, or **Delete** the annotation:

Copying Text (non-touch device)

The Viewer enables users to copy text from SVG enabled documents:

1. To copy text, use the **Text Selection** tool located under the **View** tab at the bottom of the screen:
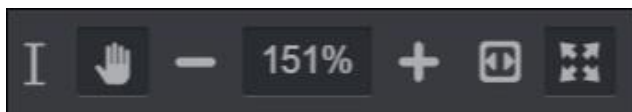
2. Select the **text** and the immediate action menu displays. Select **Copy...**
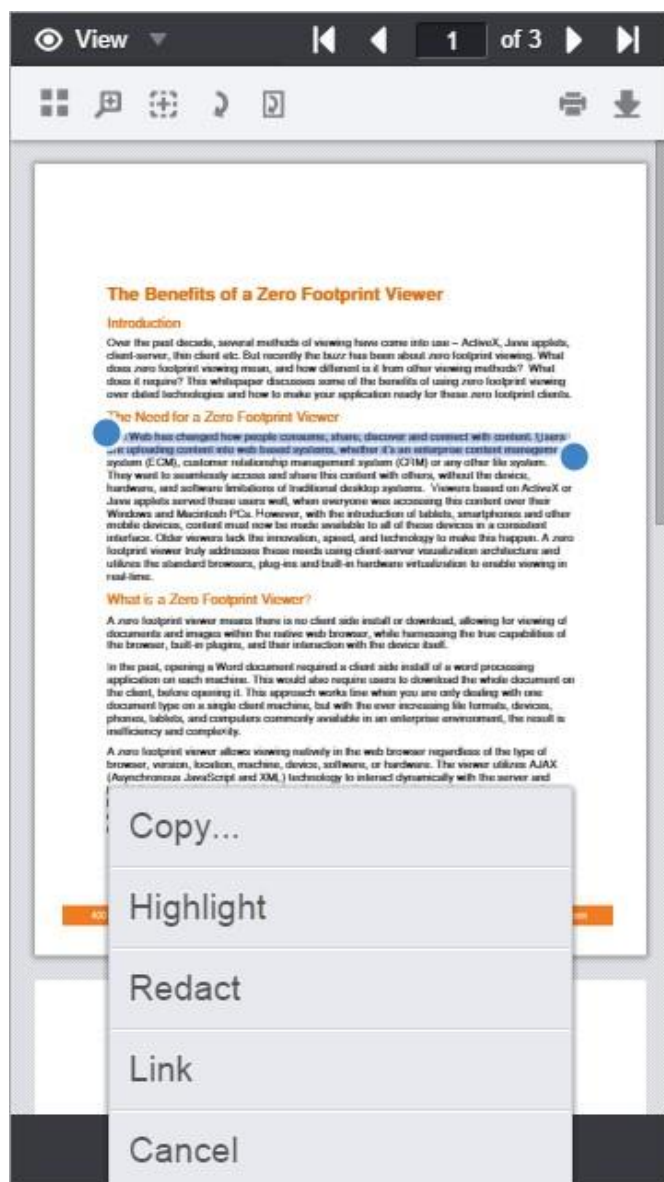
3. Paste the text as desired.

Copying Text (touch device)

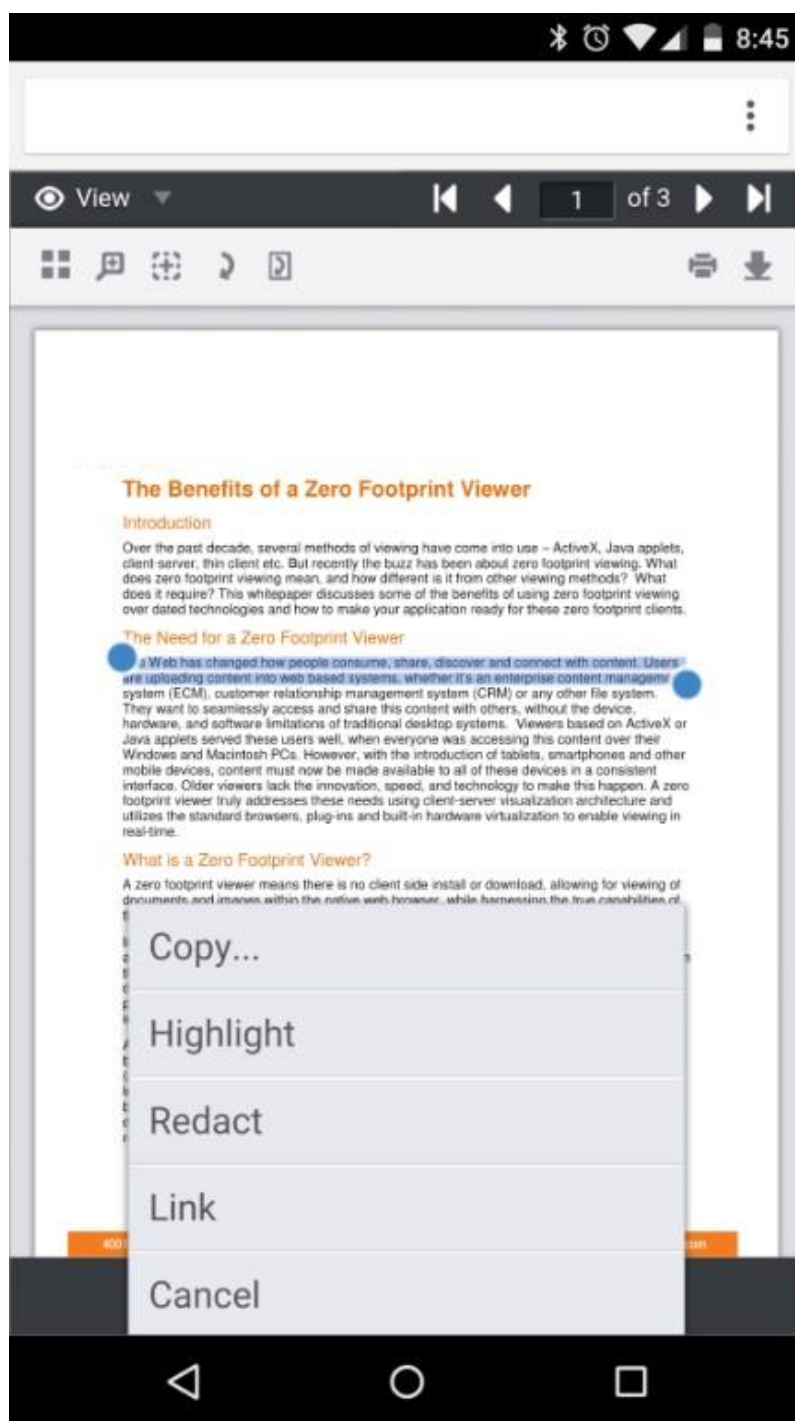1. Select **text** and the immediate action menu displays:

2. Tap on the "**Copy...**" item.
3. Paste the text as desired.

Copying Text (Android device)

1. Select **text** and the immediate action menu displays:

2. Tap on the "**Copy...**" item.
3. Paste the text as desired.

View Embedded Hyperlinks

Viewing embedded hyperlinks is supported for:

- **External Links** - Office and PDF documents
- **Internal Links** - PDF documents only

When viewing a document that contains embedded hyperlinks, you can click on the following links:

- Email addresses
- Intra-document links (to another page within the document)
- External links to websites

Email addresses

1. When you click on an **email address**, the 'mail to' box appears and you can click **the link** to launch your email client and send an email:

Intra-document links (to another page within the document)

1. When you click on **the link**, the 'go to page' box appears and you can click on **the link** to go to that page:
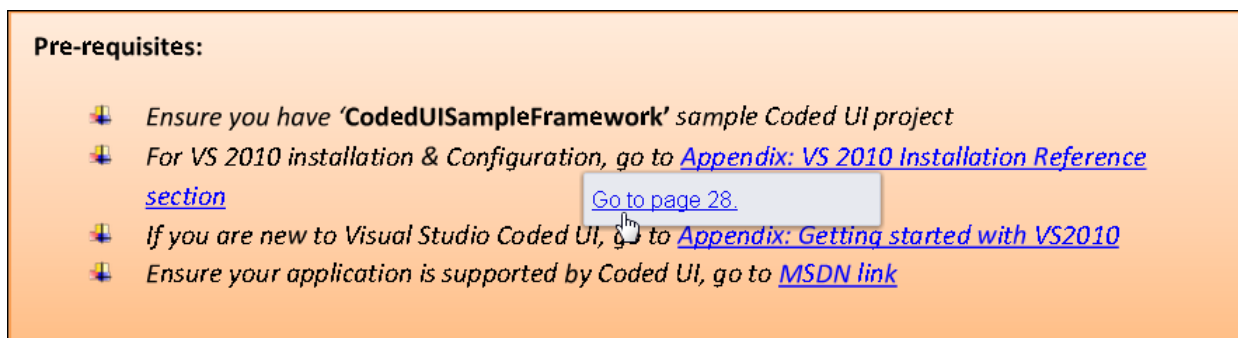
2. To return to the original page, click on the **Thumbnail icon** to view the pages within the document and you can easily scroll back to the page you were on:

External links to websites

1. When you click on **the link**, the URL shows and you can click on **the link** to go to the website:

Figure 1: The topology required for setting up Build, Deploy and Test environment using various VS components like Build Controller and Agents for Build, Test Controller and Agent for distributing test and collecting results, Virtual environment for Deployment and Execution (Reference taken from MSDN)
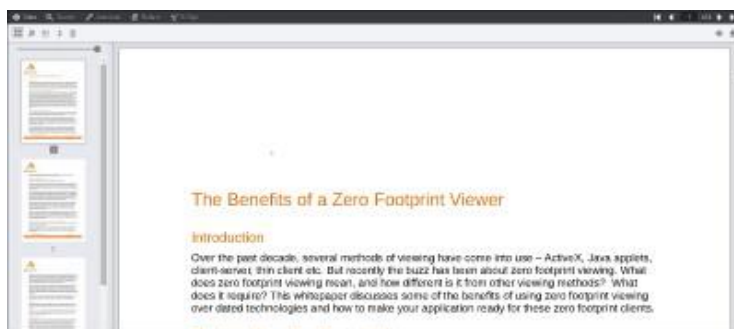
http://msdn.microsoft.com/en-us/library/fda2bad5.aspx

Work with Thumbnails

The Thumbnails Tool is located on the View tab and offers several ways to view Thumbnails:
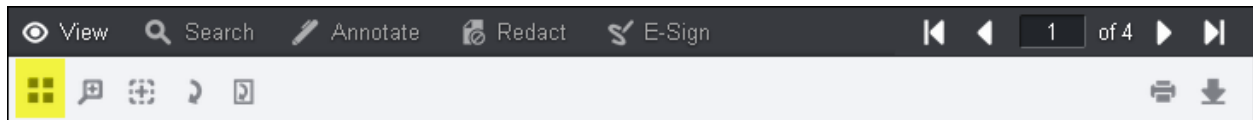
To use the Thumbnails Tool for viewing:

1. Click on the **Thumbnails Tool**. The Thumbnails pane displays:

2. Click on the **scrollbar** to scroll down and view additional thumbnails:

3. Click on and drag **the slider** to the left to reduce the size of the thumbnails:
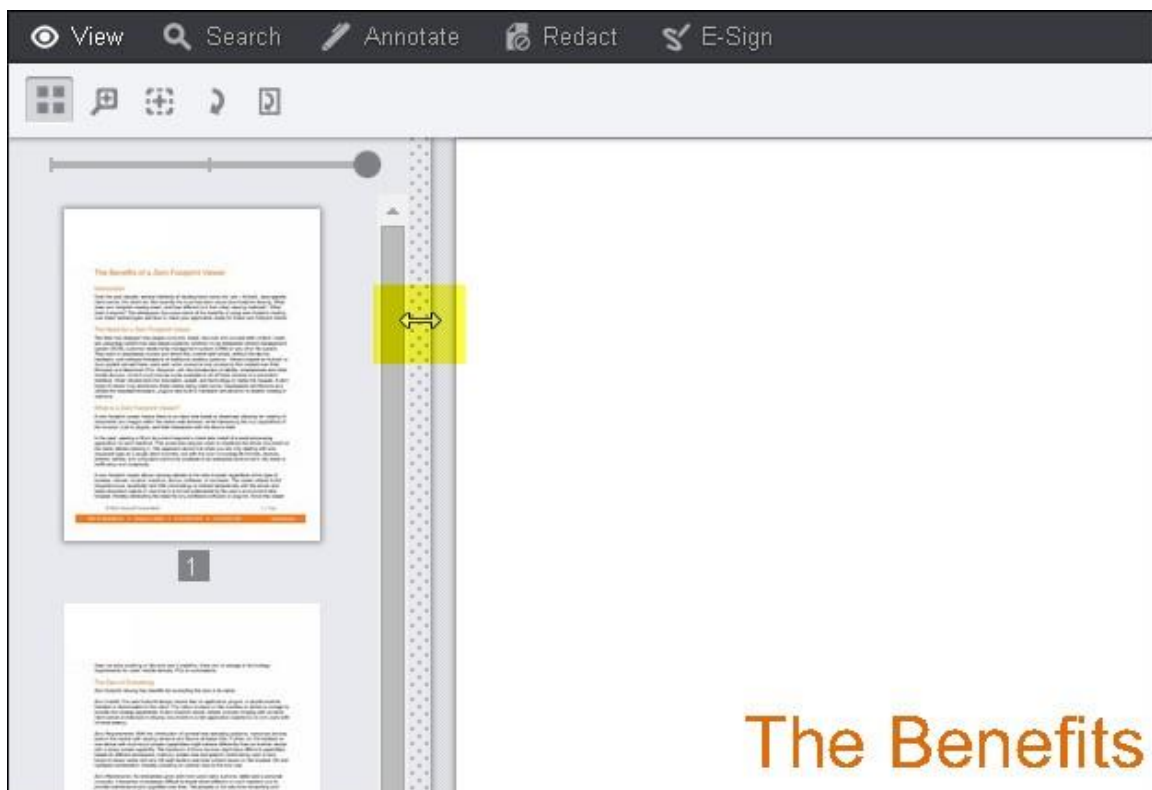
4. To further reduce the size of the thumbnails, click on **the slider** and drag it all the way to the left:
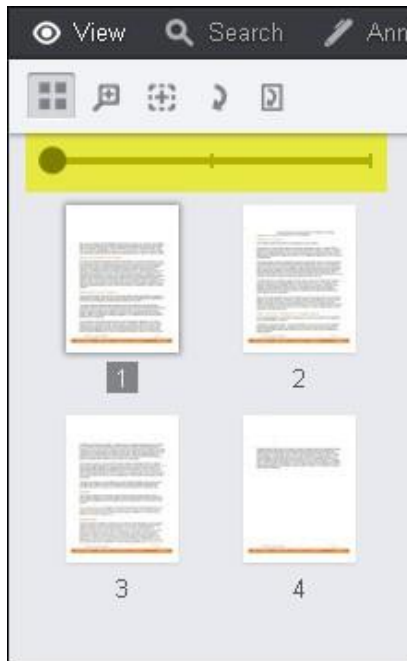
To enlarge the size of the thumbnails, click on **the slider** and drag it all the way to the right.

5. You can also click on the dotted area to resize the Thumbnail pane. Click on the **dotted area** and drag it to the right or left as desired:
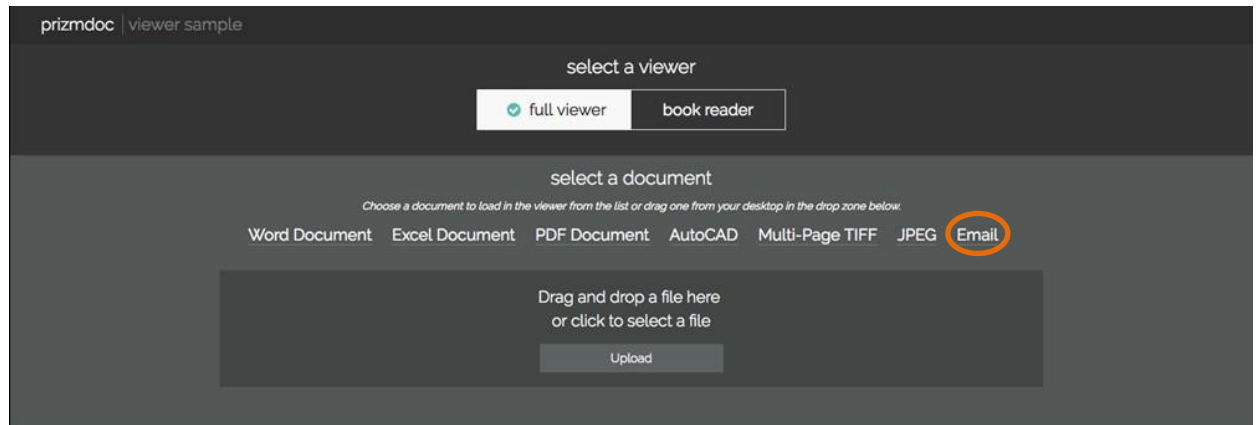

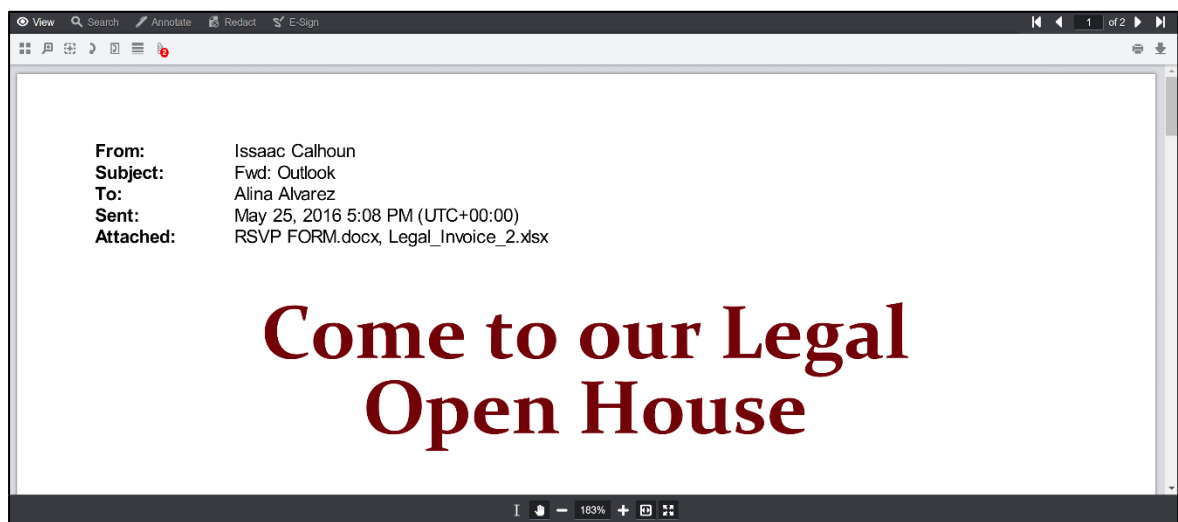Drag the dotted bar to the right to expand the pane:
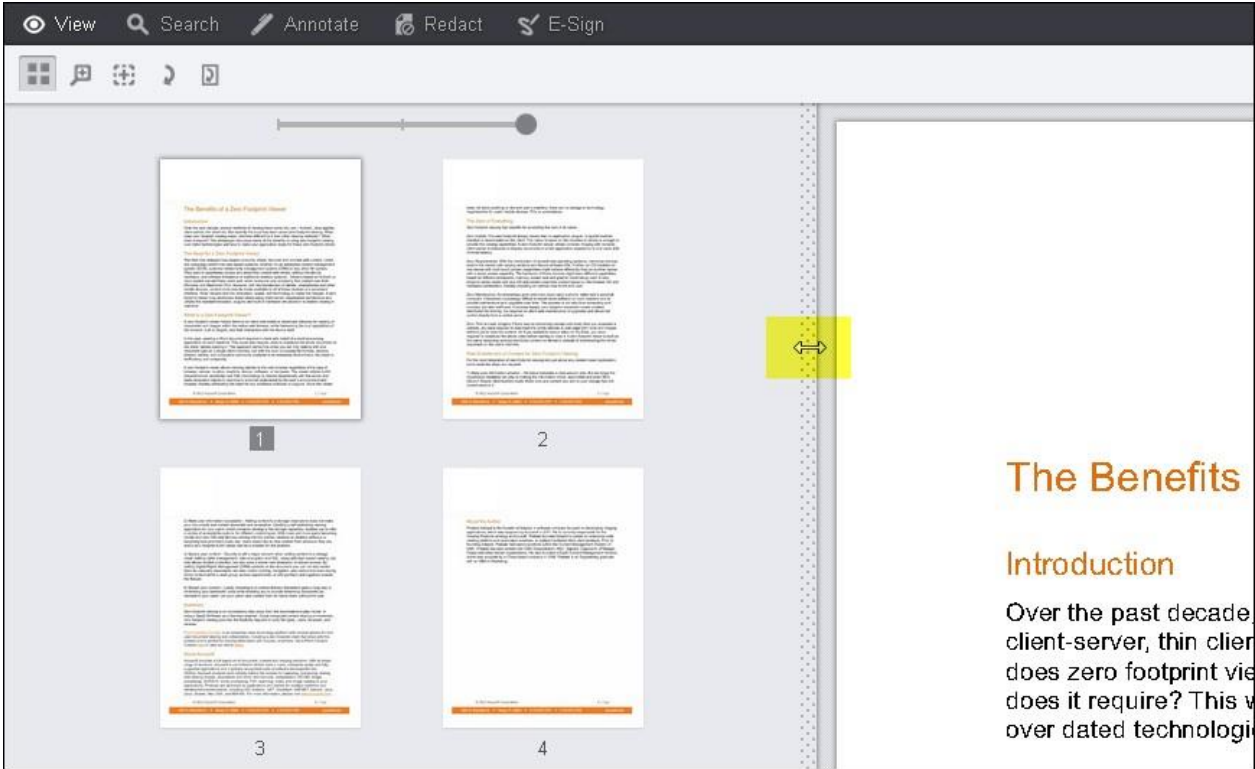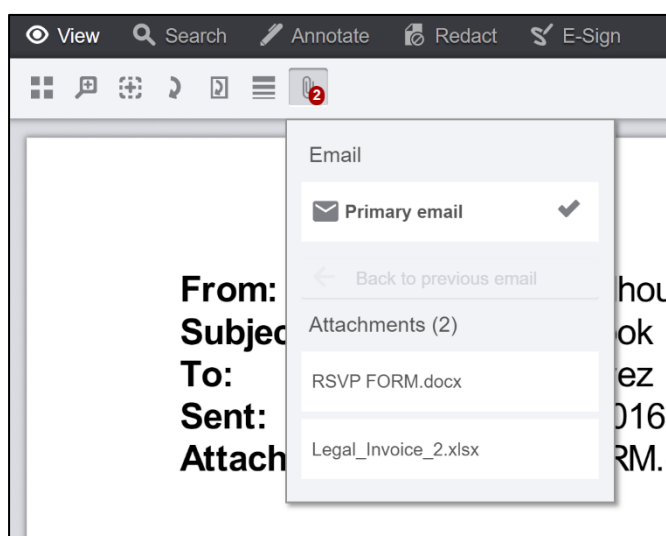
Work with Email Attachments

1. To open an email in the Viewer, click **Email** on the Splash screen:


2. The Viewer opens and displays the email:

3. If the email has attachments, you'll see a **Paperclip** icon located on the left side of the toolbar with a red circle indicating the number of attachments. To see the email's attachments, click the **Paperclip**:

The **Paperclip** icon only appears in **View** mode, and only when the email contains at least one attachment.

4. The attachments drop-down will display the email's attachments, and lets you navigate to the attachments and then back to the original email.

5. To view an attachment, click the **name of the attachment** you want to view:
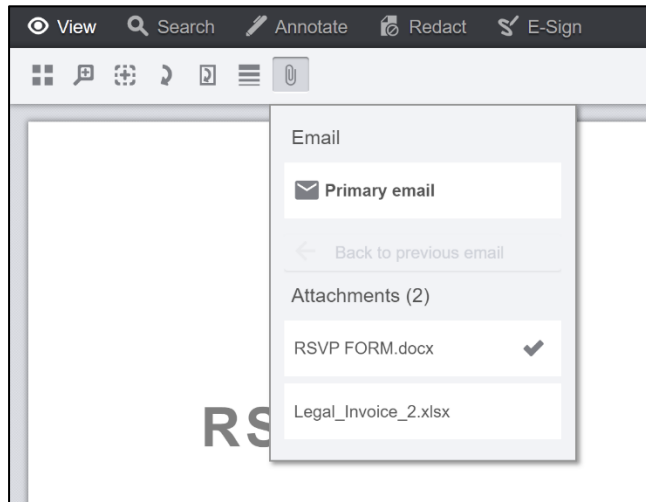
6. The Viewer displays the attachment, allowing you to perform additional operations on it (for example, **Search** or **Annotate**). To navigate back to the original email or to another attachment, click **View** to return to **View** mode, then click the **Paperclip** icon to navigate as needed.

Search Documents

This section explains how to run a simple search on a document and how to access previous and pre-defined searches:

- Search Box and Icons
- Search Patterns, Filters & Document Review Features
- Use the Fixed Search Terms Feature
- Use the Proximity Search Feature
- Redact Search Results

Search Box and Icons

To use the search document text box:

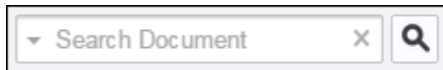1. Enter the **text** you want to search for in the Search Document text box and click the **Magnifying Glass** (or press **Enter**):
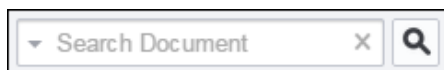
2. The Viewer will return the results listing the page number in the left-hand viewing pane. Click on the **result** you want and the Viewer will display the page in the right-hand pane:
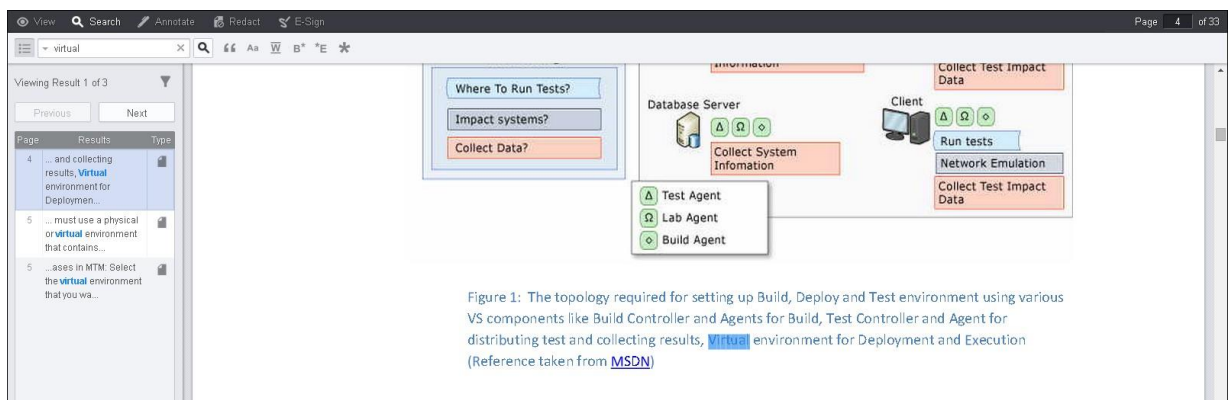
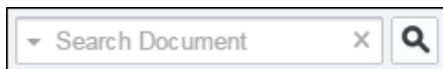3. To clear the search results, click on the **X** in the Search Document text box:
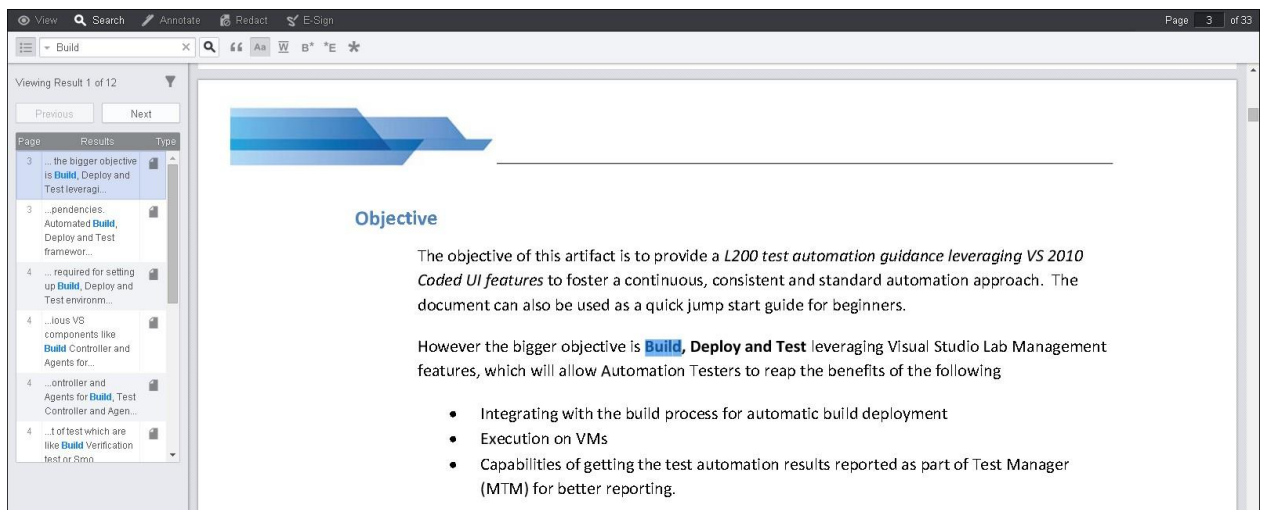

To use the search icons:

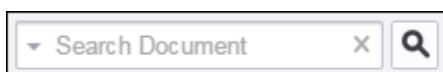1. Click on the **search icon** you want to use:
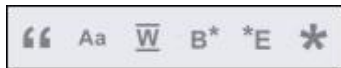
2. Enter the **text** in the Search Document text box and click the **Magnifying Glass** (or press **Enter**):

3. The Viewer returns the results (for example, the **Match Case icon** was selected and the word **Build** was searched for):

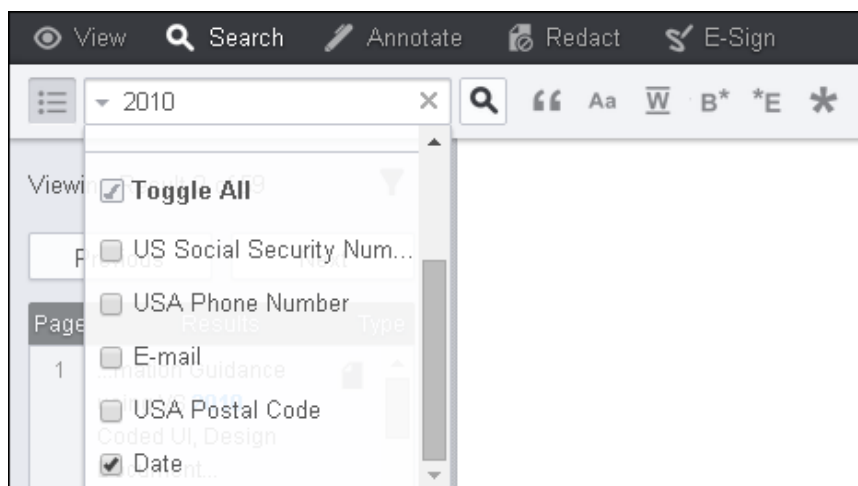4. To clear the search results, click on the **X** in the Search Document text box:

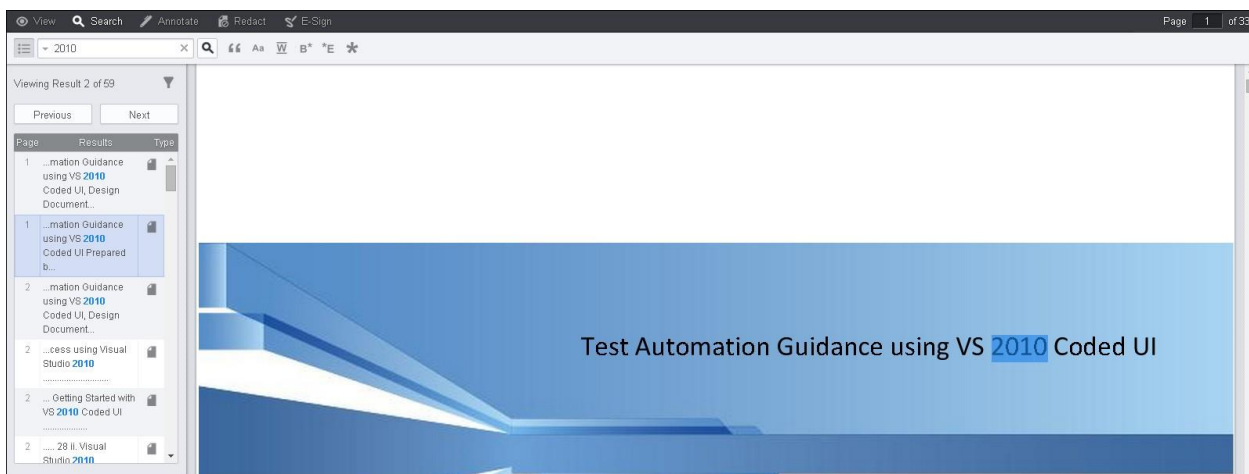# Search Patterns, Filters & Document Review Features

Search Patterns

The search patterns can be customized to use a wide variety of regular expressions.
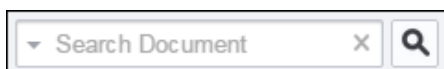
To use the search patterns:

1. Click on the Search Document drop-down arrow and select the **search pattern** you would like to use (for example, click on **Date** and then enter the **date** in the Search Document text box) and click **Search** (or press **Enter**):

2. The Viewer returns the results:

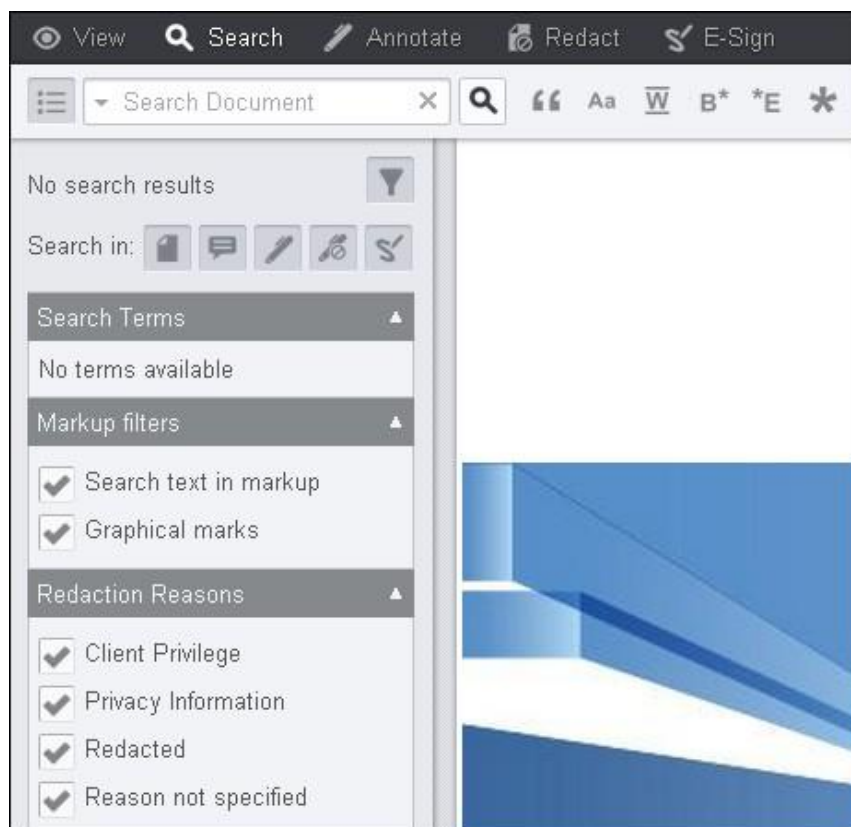3. To clear the search results, click on the **X** in the Search Document text box:

Search Filters & Document Review Features

To use the search filter:
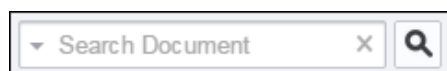
1. Click on the **Search Options** icon:


2. The default **Search Filter** is displayed:

All of the options are selected by default. If you don't want to include one or more of the options in your search, you can deselect them.
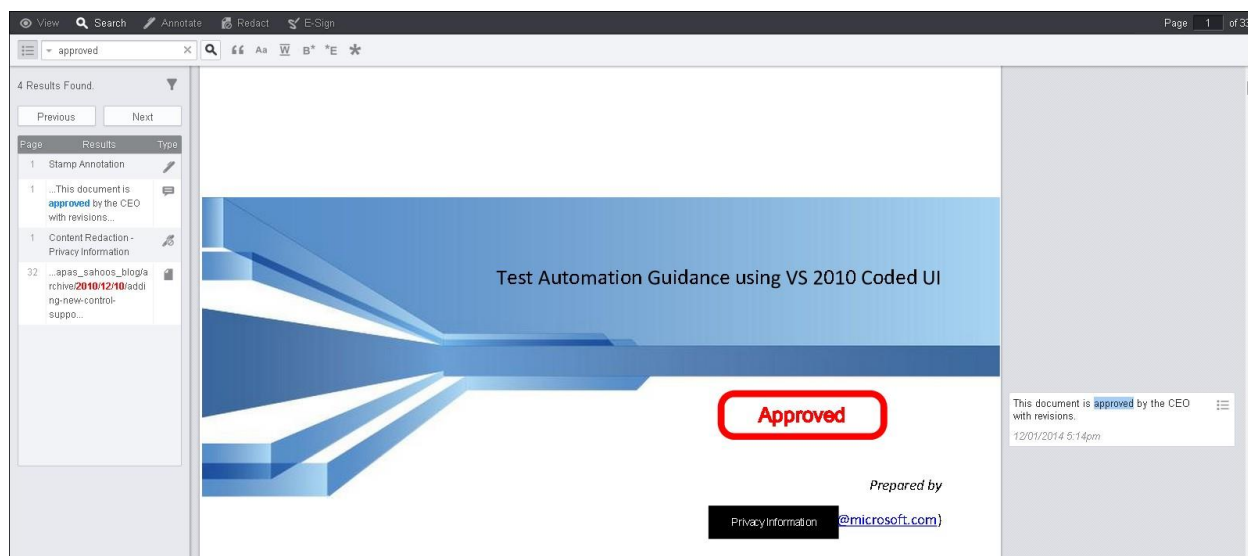
3. Enter the **text** you want to search for in the Search Document text box and click the **Magnifying Glass** (or press **Enter**):
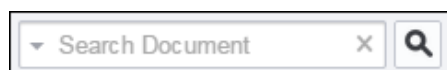

4. In this example, the term "approved" is entered and the Viewer returns two search terms and four results:
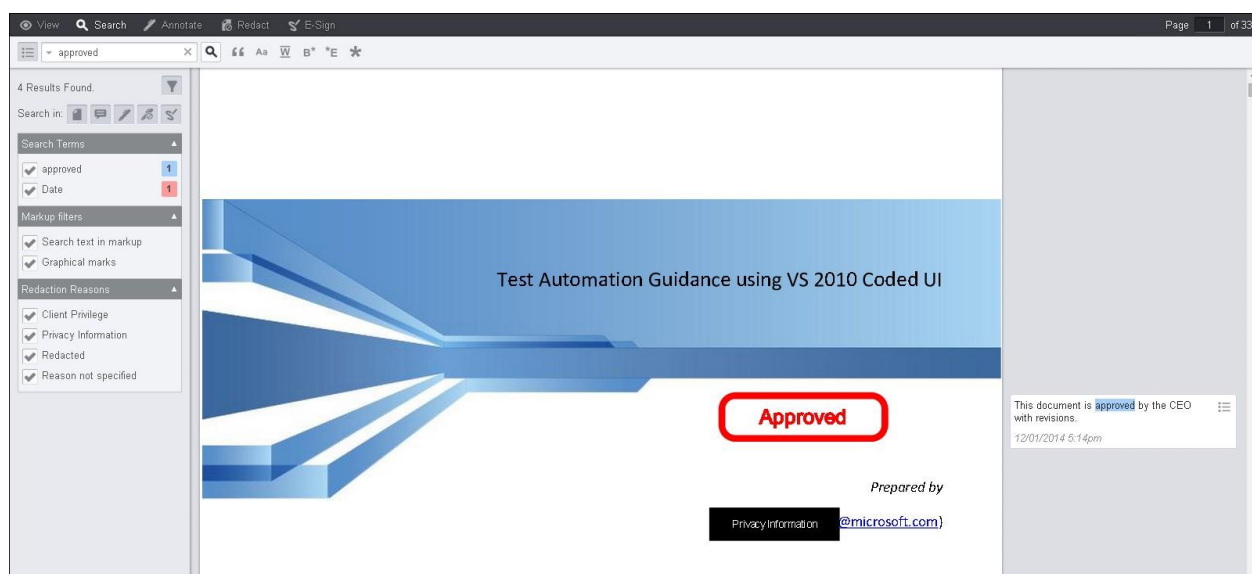
5. Click on the filter icon to view the **Page**, the **Results** and the **Type** found:

6. To clear the search results, click on the **X** in the Search Document text box:
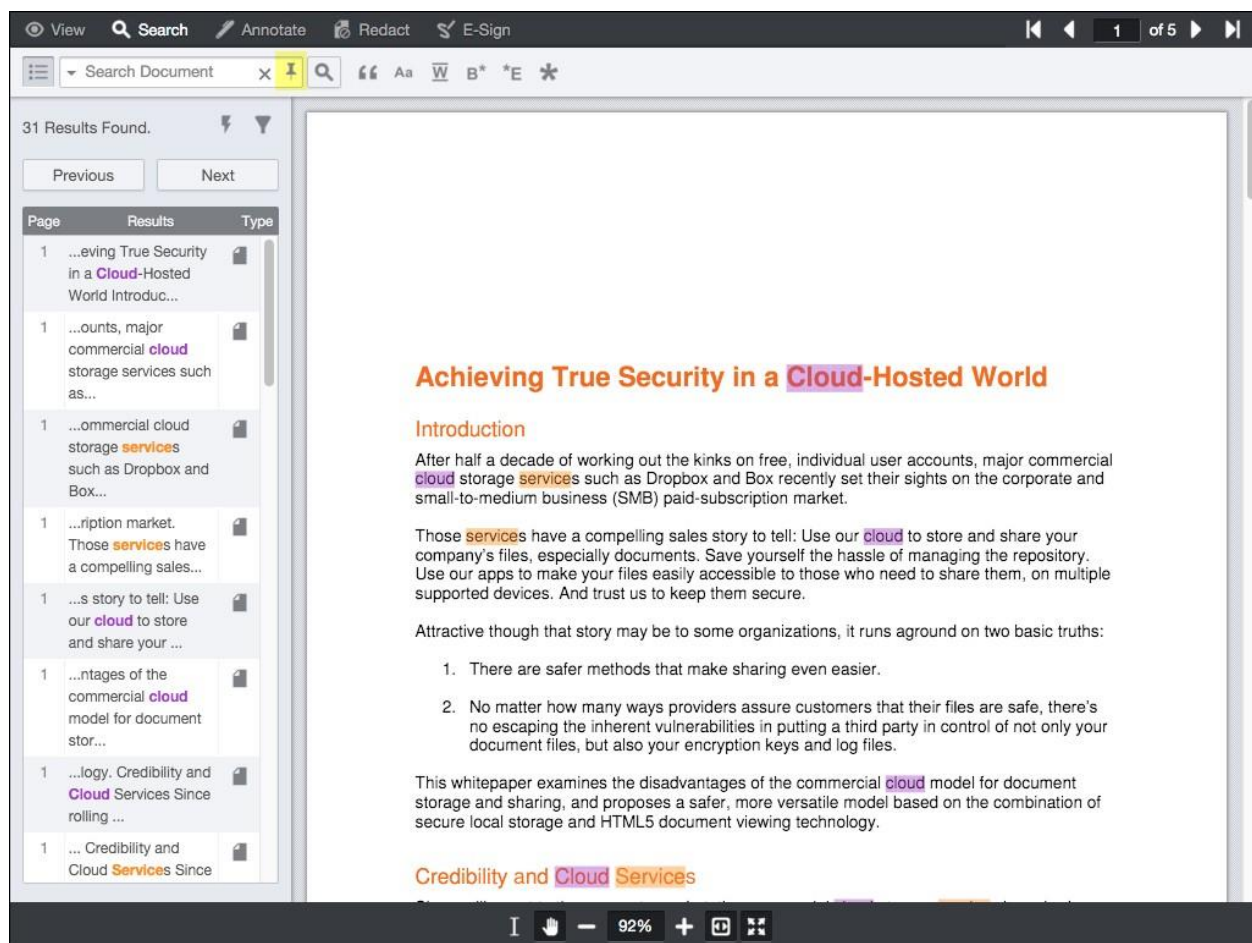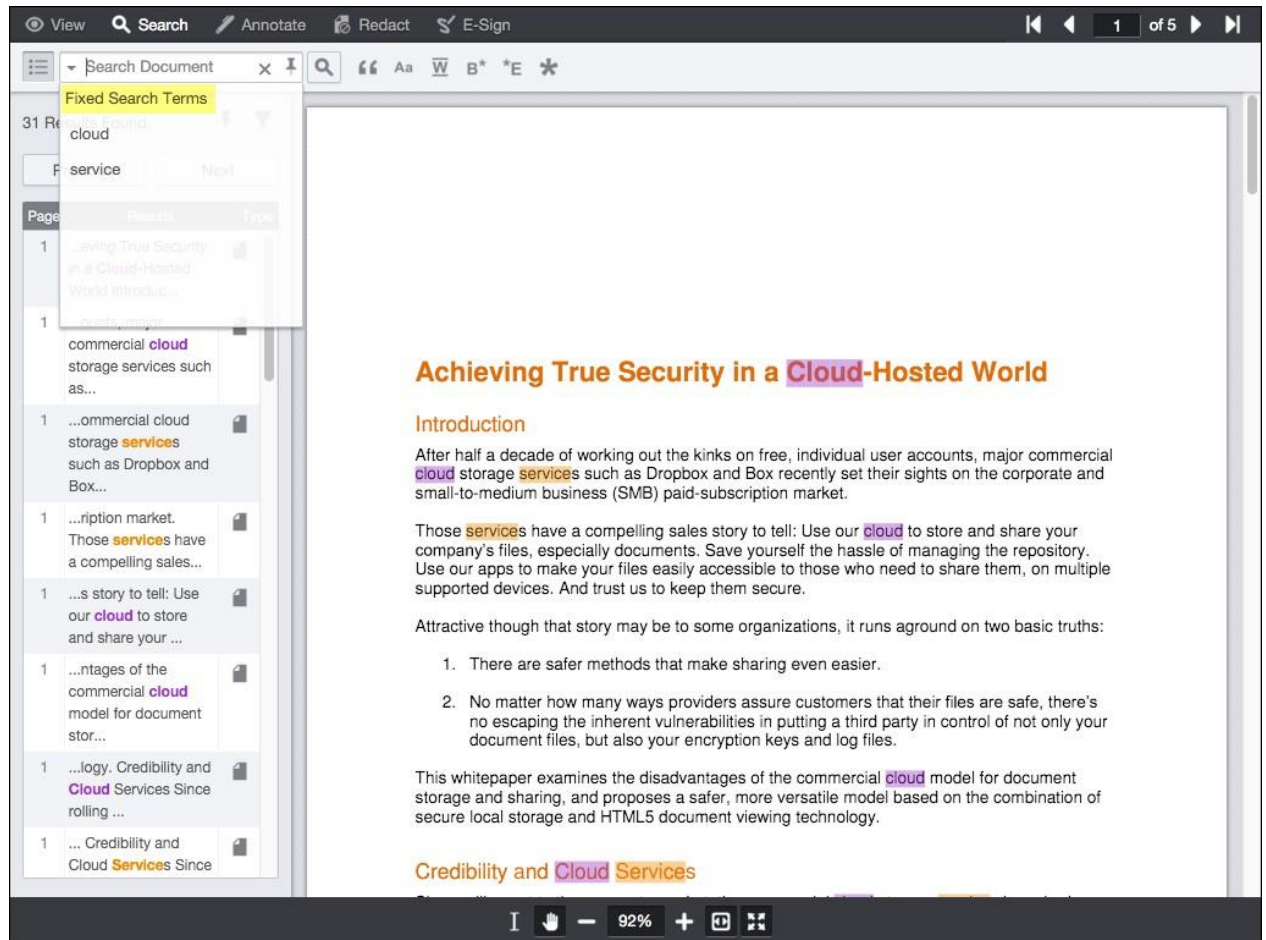

Use the Fixed Search Terms Feature

To use the Fixed Search Terms feature:

1. If a preloaded, fixed search is run when the document is loaded, the Viewer will open on the Search tab. A push-pin icon indicates that the Fixed Search is loaded and is displayed to the right of the Clear button in the Search input box:
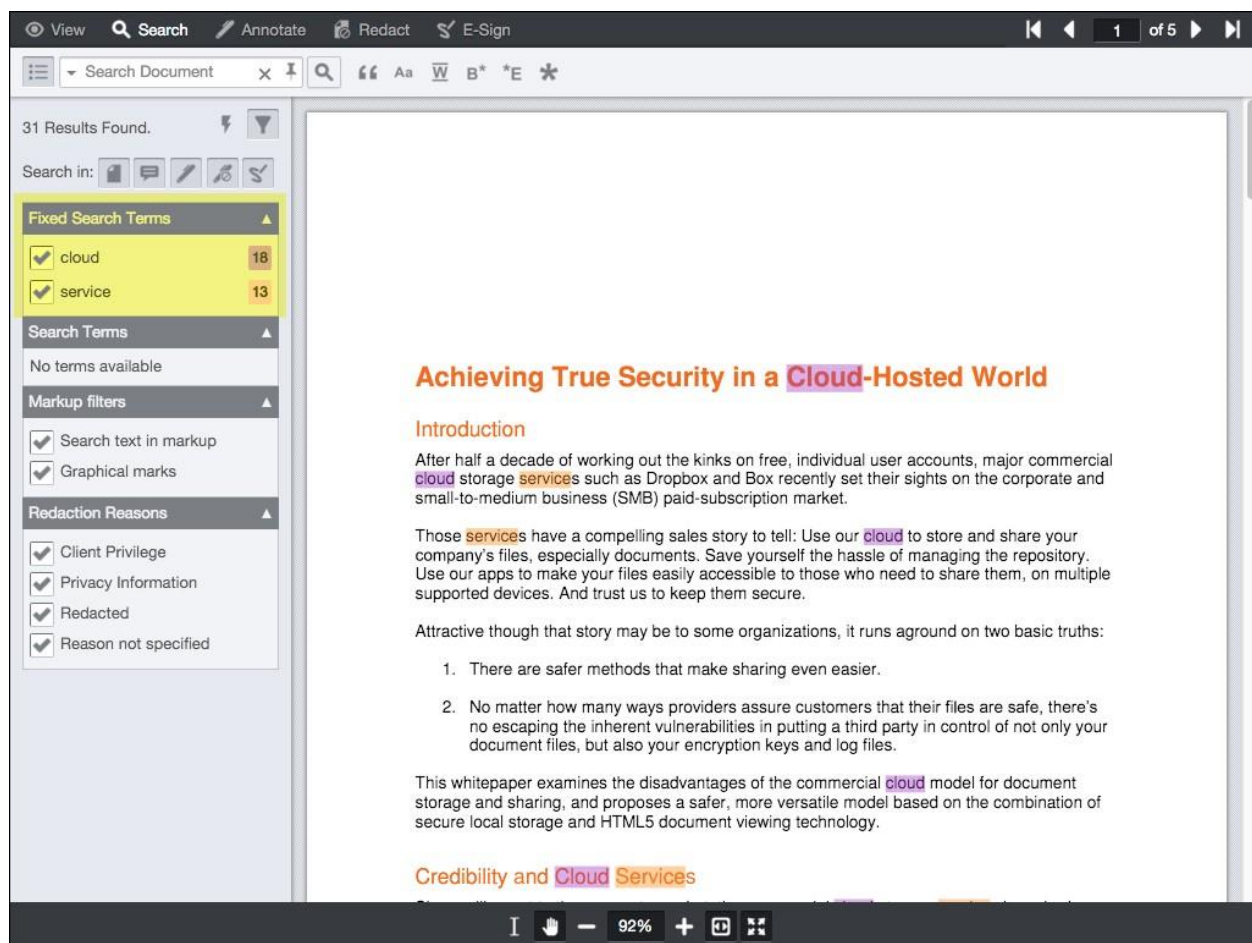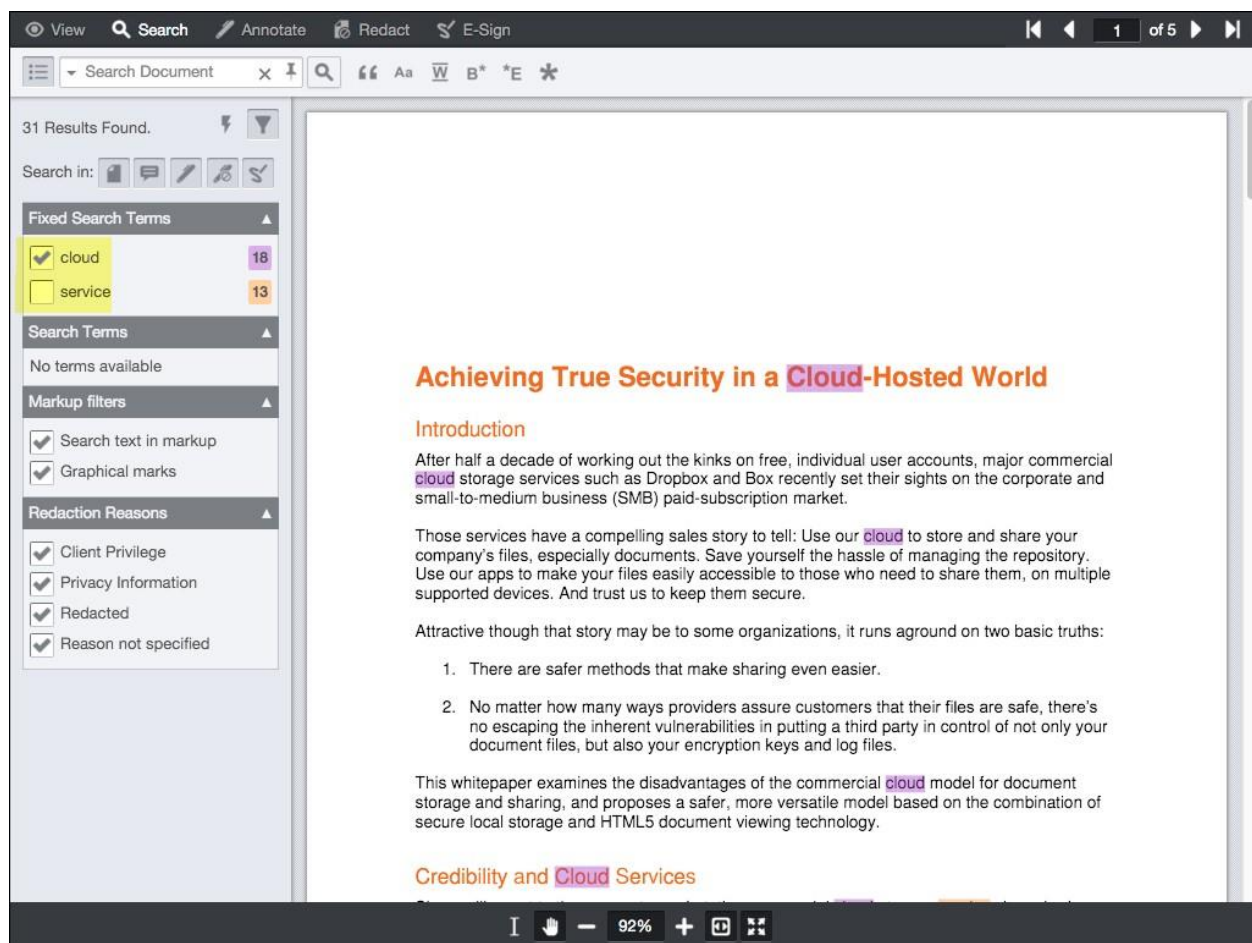
2. Click on the **push-pin** icon (in the Search box) and a list displays showing the Fixed Search Terms that are loaded in the document:
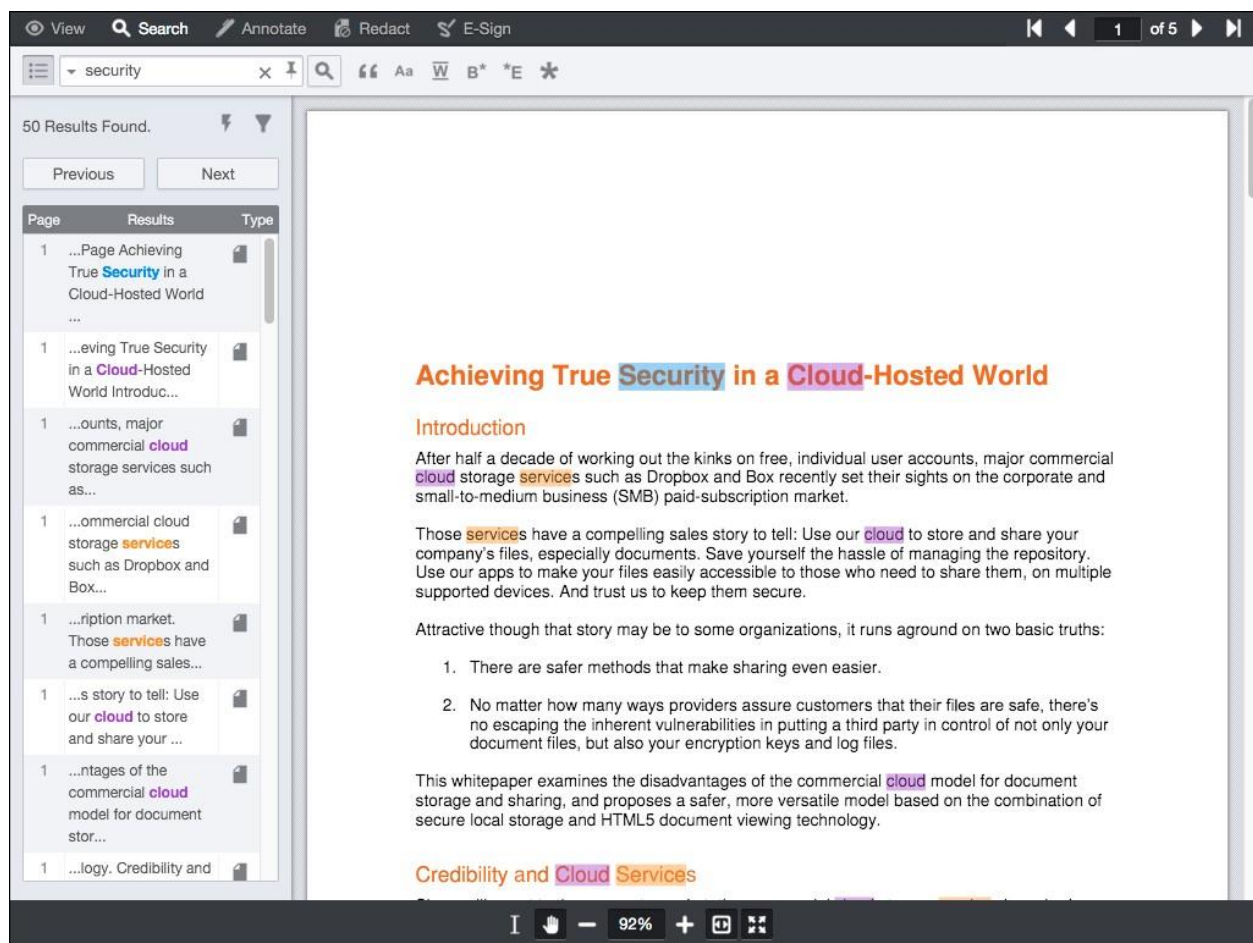
3. Click on the **Search** filter and you will see the Fixed Search Terms displayed at the top of the Search panel in their own section:

4. You can filter out a Fixed Search Term by de-selecting the **checkbox** next to the term:
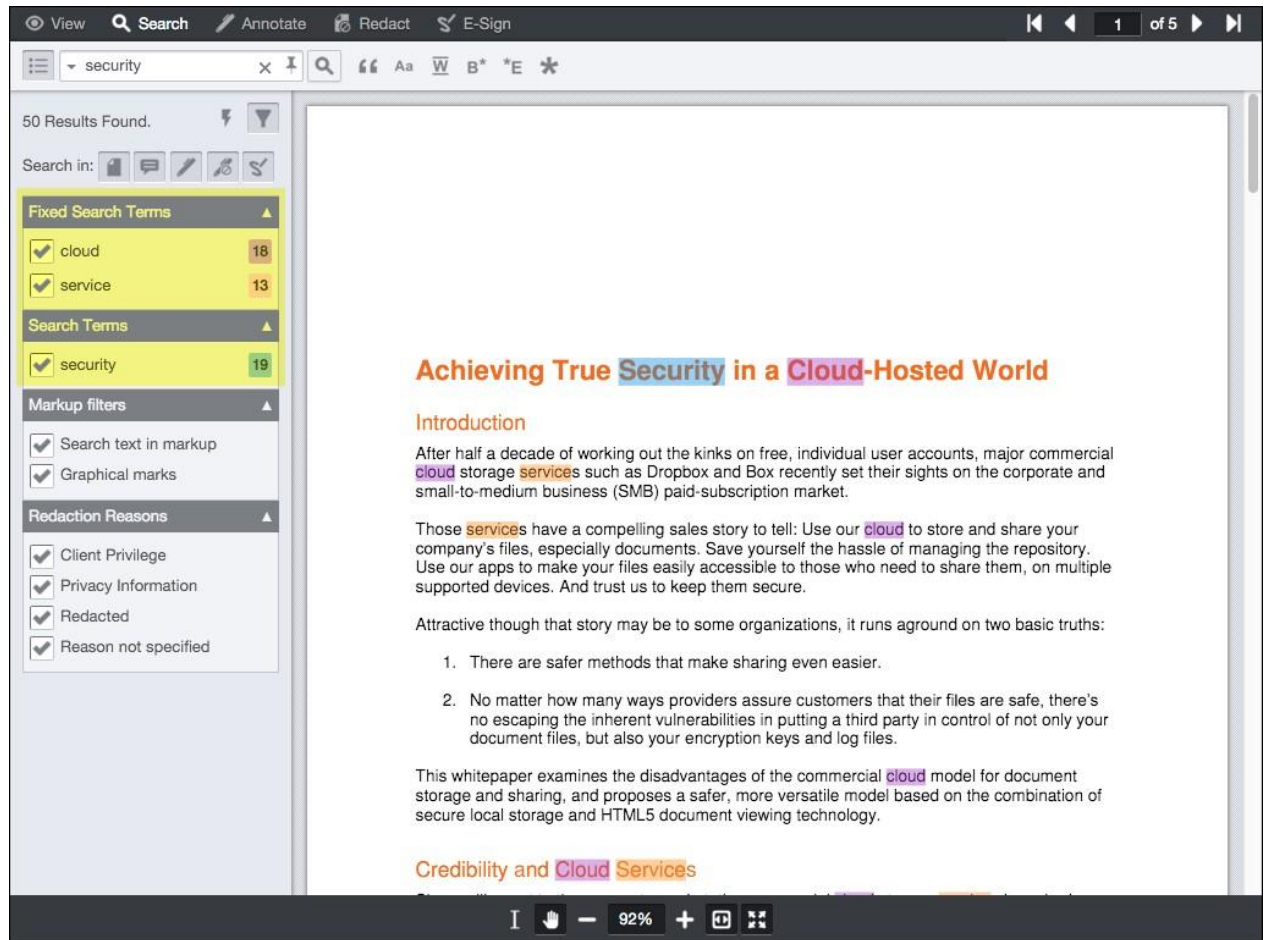
5. You can enter **additional search terms** along with the Fixed Search Terms:
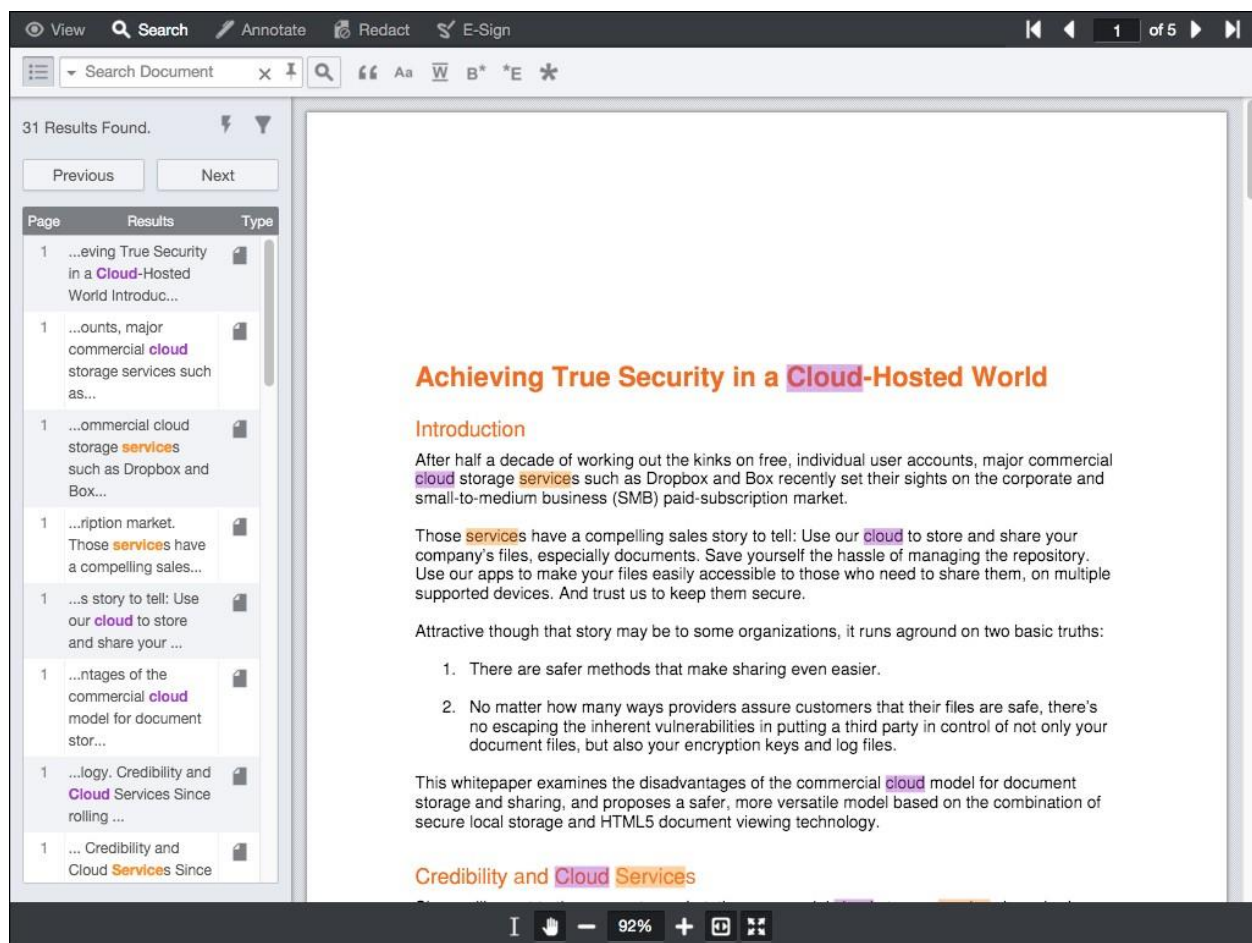
6. If you enter additional search terms, they will display in the Search panel under the Fixed Search Terms:

7. To clear the search results, click on the **Clear** button. The additional search terms you entered will be cleared, the filters return to the default state and the Fixed Search Terms remain:
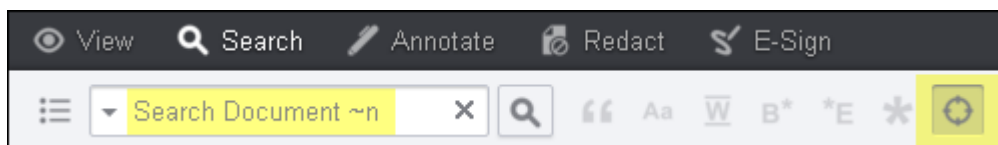
Use the Proximity Search Feature

The Search tab contains the Proximity Search feature that helps you search for two terms within a specified distance of each other. You can perform a proximity search by using the ~n syntax in the search bar, where "n" represents how many words can be between the first and second search terms and still return a result. When the search results are displayed, they will be highlighted on the document for ease of viewing.

Please note the following:

- When you select the Proximity Search icon, the other search options will be disabled.
- You must use the "~n" syntax; if you use anything else, you will get an error message.
- If your enter the correct "~n" syntax, but don't select the Proximity Search icon, a normal search is performed.
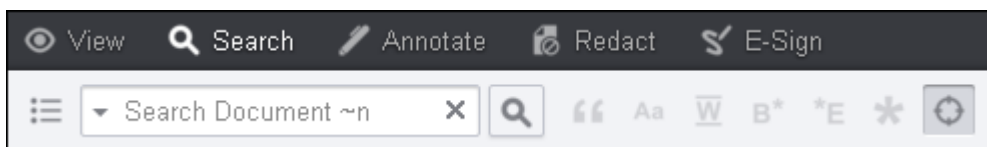
The following example shows the Search tab with the Proximity Search icon selected. The Search text box is pre-filled with the term "Search Document ~n" to help you remember to enter the terms with the ~n syntax:
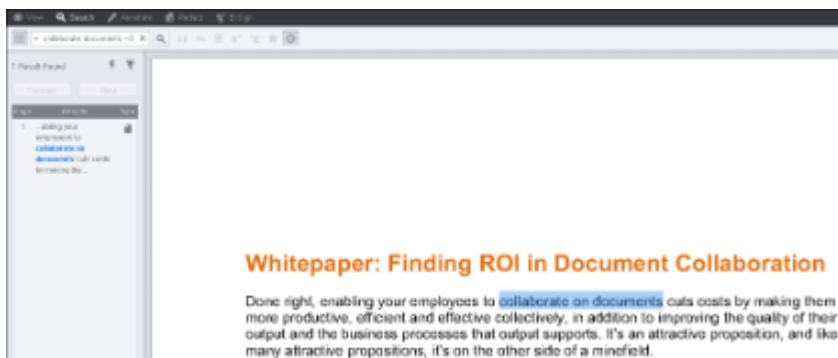

Proximity Search

To use the Proximity Search feature to search for terms:

1. From the **Search** tab, click on the **Proximity Search** icon:

2. In the **Search Document** text box, enter the **two terms** you want to search for along with the number (~n) to indicate the distance between the two terms and press **Enter**:

In the example above, the terms "collaborate documents ~3" were entered and searched for in the document. The terms are highlighted in the main viewing window and the results are also shown in the left-hand viewing pane for easier navigation with multiple search results. Note that the order of the terms you enter does not matter; you can enter "collaborate documents ~3" or "documents collaborate ~3" and the same results are returned for viewing.

Redact Search Results

Use the following steps to search for specific terms and redact them throughout the entire document.

To Redact Search Results:

1. From the Search menu, enter the **search term(s)** in the Search Document text box and press **Enter** (or click on the Search icon):


The Search Results pane is displayed with the number of results found.

2. Click on the **Quick Actions** icon (lightning bolt) and the Search Terms pane displays, highlighting the number of terms found in the document:
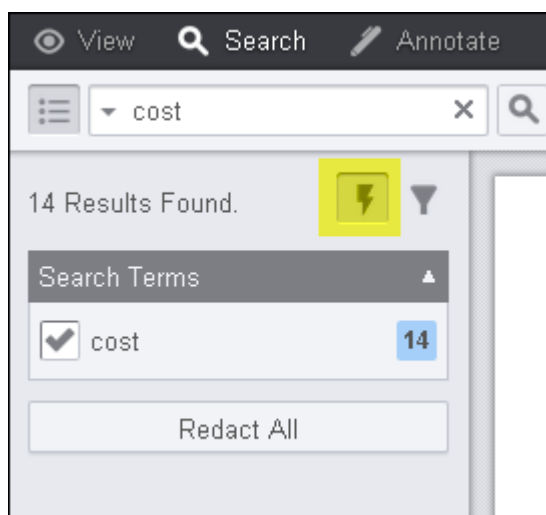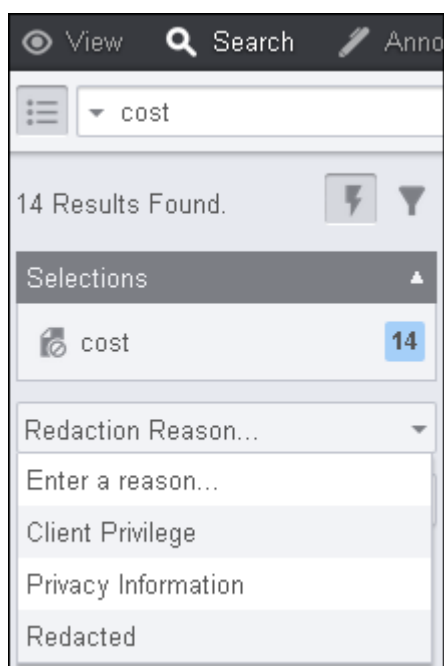
By default the checkbox for the terms is selected.

3. Click **Redact All** and the search results in the document are redacted. You can click **Done** or to select a **Redaction Reason**, continue with step 4.
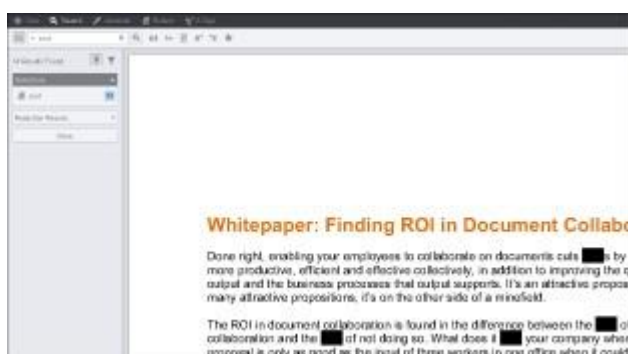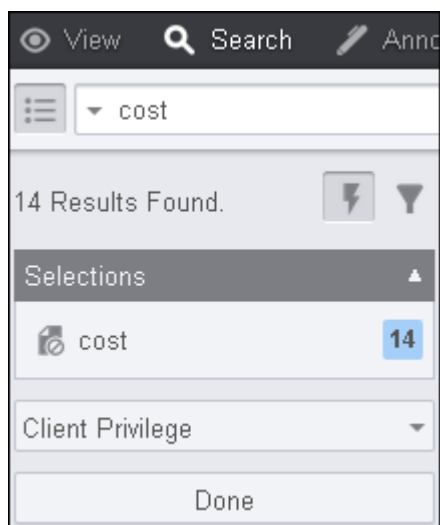

4. To select a Redaction Reason, click on the **drop-down** menu:

You can enter your own Redaction Reason or select from a pre-filled list of reasons.

5. When you are finished, click **Done**.

Annotate Documents

This section explains how to add, modify, and delete annotations, and include in burned documents:

- Create Image Stamp Annotations
- Create a Polyline Annotation
- Create a Strikethrough Annotation
- Create a Text Hyperlink Annotation
- Use Annotation Layers
  - Work with Annotation Layers
  - Load Annotations
  - Save Annotations

Create Image Stamp Annotations

Image Stamps are available under the Annotate menu. You can select a custom image and place it anywhere on your document. The following example shows Image Stamp Annotations displayed in the Viewer:
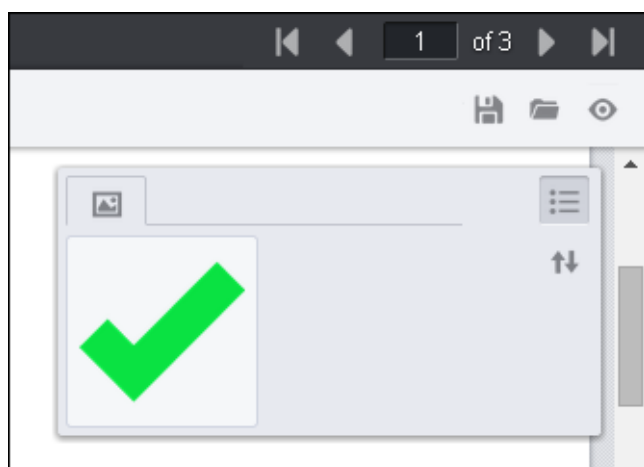
To Add an Image Stamp Annotation to Your Document

> Image stamp file size needs to be appropriate for the end users web browser and network capabilities. Also, IE8 can handle a maximum image stamp file size of 32KB.

1. Select the **Image Stamp** annotation:

The Image Stamp annotation context menu displays on the right-hand side of the Viewer:

2. Draw the **image stamp** on the document. The floating Context menu displays next to the image stamp:

You can **Add Comment**, **Select** the image stamp, or **Cancel**. You can also select the image and move it anywhere you want on the document.

3. From the Context menu, you can **adjust the layer placement**, **add a comment** or **delete the image**:

4. To choose a different image stamp, click on the **image** in the Context menu:

5. The Select an Image Stamp dialog box displays:
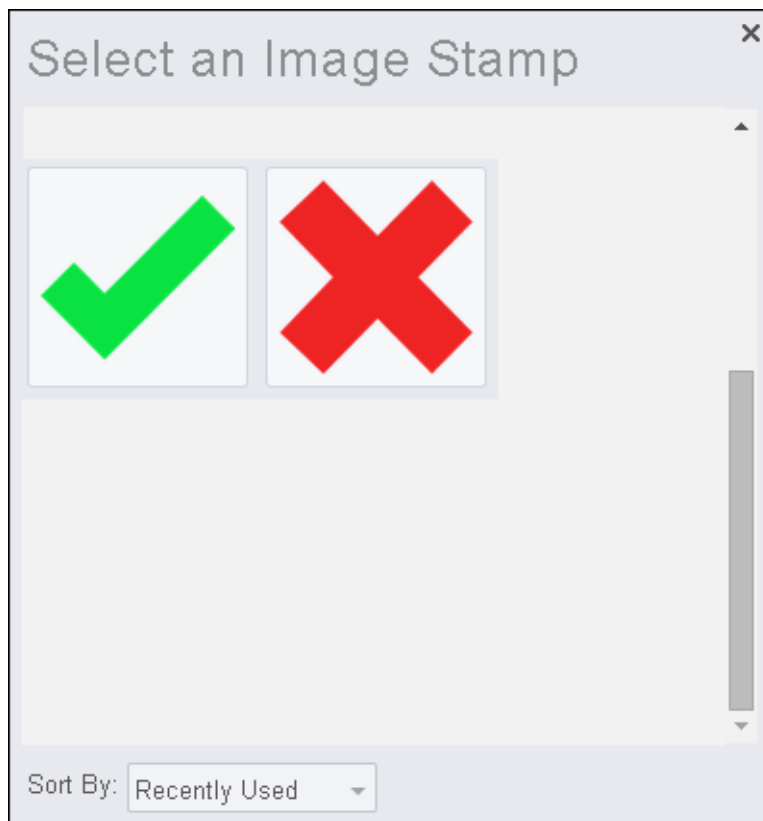
6. Click on the **image** you want to use and the new image is placed on the document.

Create a Polyline Annotation

You can add a Polyline annotation to your document. The Polyline is available from the Annotation menu:

To add a Polyline annotation to your document:

1. Click on the **Polyline** annotation:

2. Draw the **Polyline annotation** where you want it to be on the document. Click to stop the line, then start drawing again. Double-click to complete drawing the Polyline annotation:
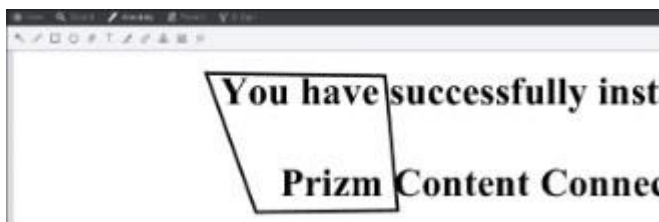
3. After you complete drawing the Polyline annotation, a context menu displays where you can **select to add a comment**, **select the annotation** or **cancel**:

4. When you select the **Polyline annotation**, you can make other selections from the Comments menu, such as **line thickness**, **color**, **layer placement**, or **add a comment**:
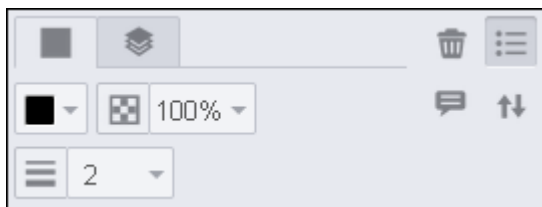
5. To **delete** the Polyline annotation, click on the **Trash icon**.

Create a Strikethrough Annotation

You can add a Strikethrough annotation to your document. The Strikethrough is available from the Annotation menu:

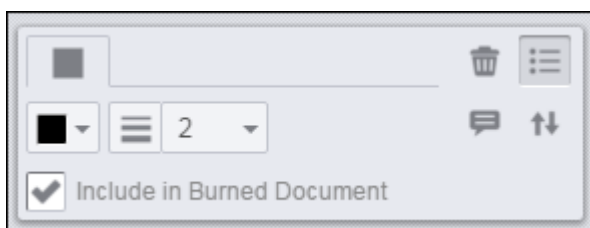**To add a Strikethrough annotation to your document:**

1. Click on the **Strikethrough** annotation:

2. Highlight the **text** that you want to strikethrough on the document:
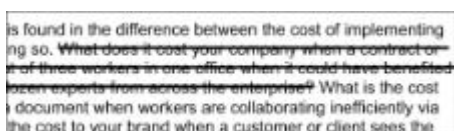
3. After you complete highlighting the text, a context menu displays where you can select to add a **comment,** select the **color** of the Strikethrough annotation, select the **size** of the Strikethrough, or click a **checkbox** to burn the annotation into the document:

4. To **delete** the Strikethrough annotation, click on the **Trash icon**.

Create a Text Hyperlink Annotation

You can now add a Hyperlink annotation to your document. The Hyperlink annotation is available from the Annotation menu:
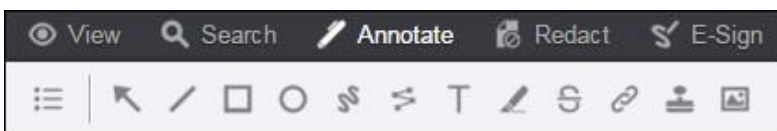
> 🖼️ You can easily modify your hyperlink annotation by using either touch or mouse.

To add a Hyperlink annotation to your document:

1. Click on the **Hyperlink** annotation:
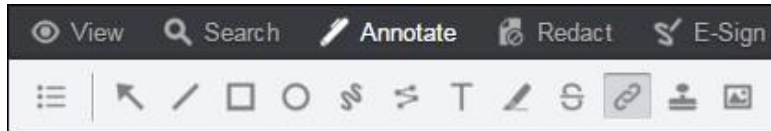
2. Select the **text** that you want to add the hyperlink to and the link text box appears:

3. Type the **web address** into the link text box and select the checkbox:
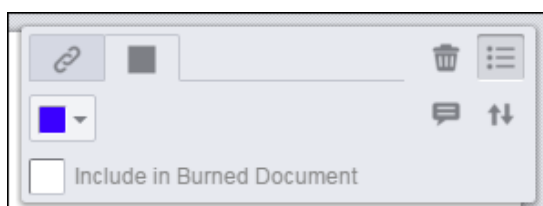

4. Click on the **text with the Hyperlink annotation** and the hyperlink appears. Note that "http//:" is automatically added to the link for you:

5. You can edit the hyperlink by clicking on the **pen icon**. From the comment menu, you can change the link, add a comment, select the checkbox to burn the hyperlink into the document or delete the hyperlink:
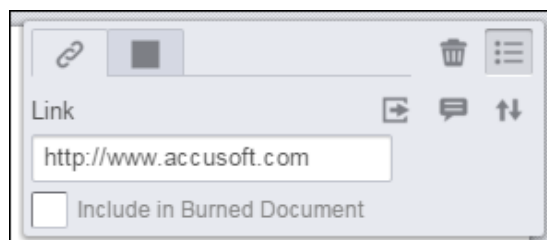
6. You can also select a different color for the hyperlink:

7. When finished, click on the **hyperlink** to go to the web site.

Use Annotation Layers

This section explains how to load, save, and copy/merge annotation layers:

- Work with Annotation Layers
- Load Annotations
- Save Annotations

Work with Annotation Layers

The Annotation Layering functionality allows you to create, view and manage multiple sets of annotations within a document and improves collaboration during document reviewing.

This section covers how to use annotation layers within a document and assumes you are already familiar with adding annotations and redactions to your document. If you have not added annotations or redactions to your document, refer to the following topics first: Working with Annotations and Working with Redactions.

This topic contains the following sections:

- Introduction
- How to Create & Save Your Own Layer under the 'My Annotations' Pane
- How to Load Annotations from other Reviewers from the 'My Annotations' Pane
- How to Edit the Name of an Annotation Layer under the 'My Annotations' Pane
- How to Hide an Annotation Layer under the 'My Annotations' Pane
- How to Load and Review Annotations from the 'Annotations for Review' Pane
- How to Show & Hide Annotations from the 'Annotations for Review' Pane
- How to Merge Annotations from the 'Annotations for Review' Pane
- How to Merge all Annotations from the 'Annotations for Review' Pane

Introduction

The Annotation Layer functionality is located under both the Annotate and Redact tabs:

Annotate tab:

Redact tab:

Once you click on the Annotation Layers icon, you can go to the other tabs (View, Search, E-Sign)

> and the Annotation Layers pane remains displayed.

To open the Annotation Layers pane, click the Annotation Layers icon from the toolbar:
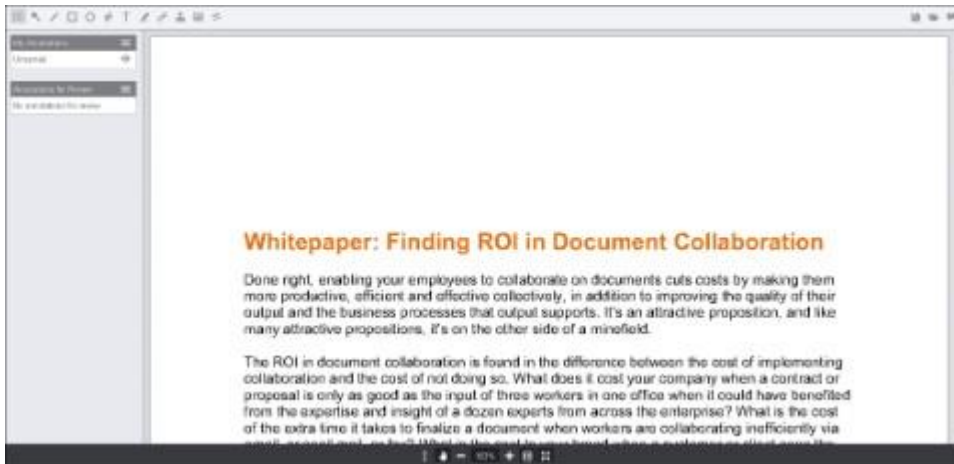
There are two sections on the Annotation Layers pane that you can use - 'My Annotations' and 'Annotations for Review':
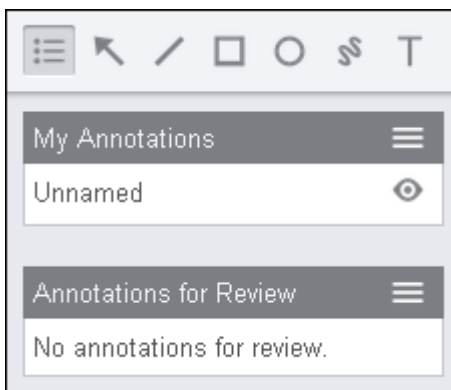
- My Annotations Pane - Load annotations, save annotations and edit the layer name.
- Annotations Review Pane - Load annotations and review, show/hide all annotations in one click, merge specific annotations or merge all annotations in one click.

The 'My Annotations' Pane

How to Create & Save Your Own Layer under the 'My Annotations' Pane

> These steps assume you already know how to add annotations to a document. If you have not added annotations or redactions to your document before, refer to the following topics first: Working with Annotations and Working with Redactions.

1. Draw an **annotation** on the document and add a **comment**.
2. Draw a **redaction** on the document and add a **comment**.

   When you click on either the annotation or redaction, the comment displays a Reply field so another reviewer can respond to your comment in that layer:
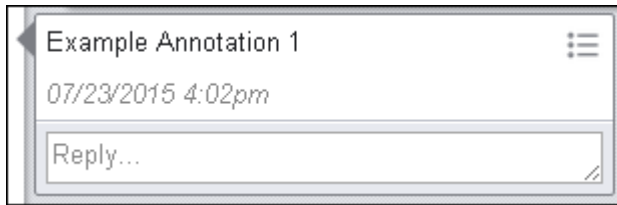
3. Under **My Annotations**, click on the **Annotation Layers** icon and three options display (Edit Name, Load Annotations, Save Annotations):
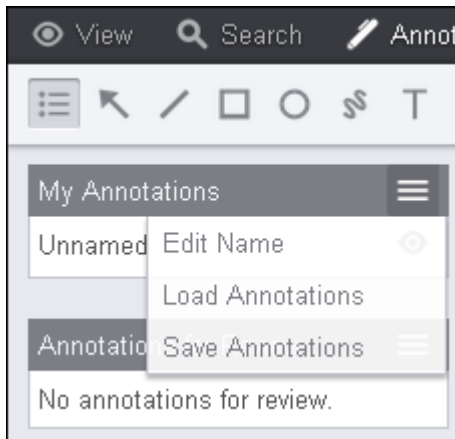
4. Select **Save Annotations.** The Save As field displays:
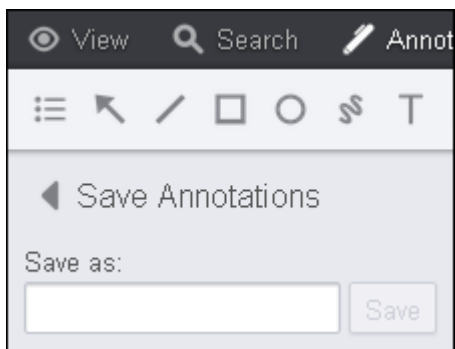
5. Enter the **Layer Name** and click **Save**.
6. A green notification bar displays stating the annotation and redaction are now saved in that layer.

How to Load Annotations from other Reviewers from the 'My Annotations' Pane

1. Under **My Annotations**, click on the **Annotation Layers** icon and three options display (Edit Name, Load Annotations, Save Annotations):
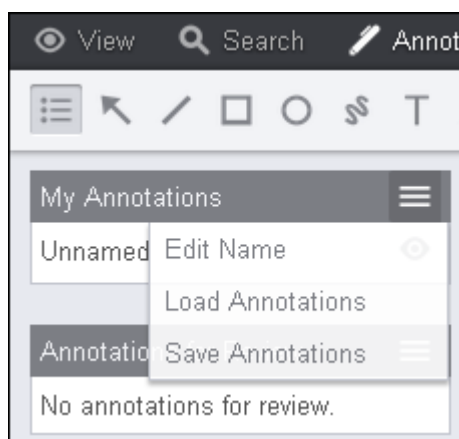
2. Select **Load Annotations**. The Load Annotations pane displays:
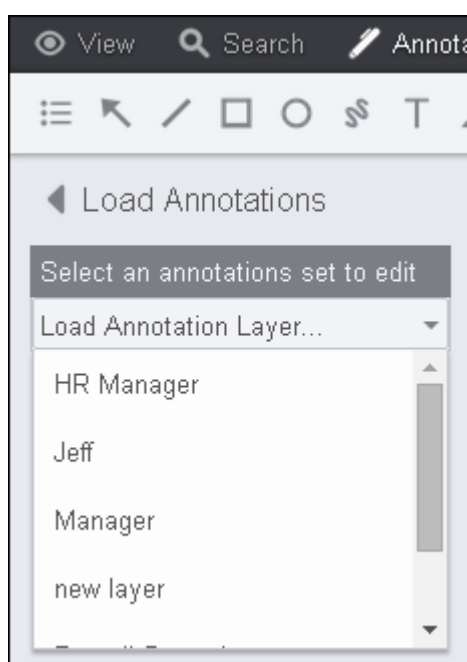
3. Select the **annotations set** you want to edit from the drop-down and another reviewer's annotations (from their layer) are displayed on the document:
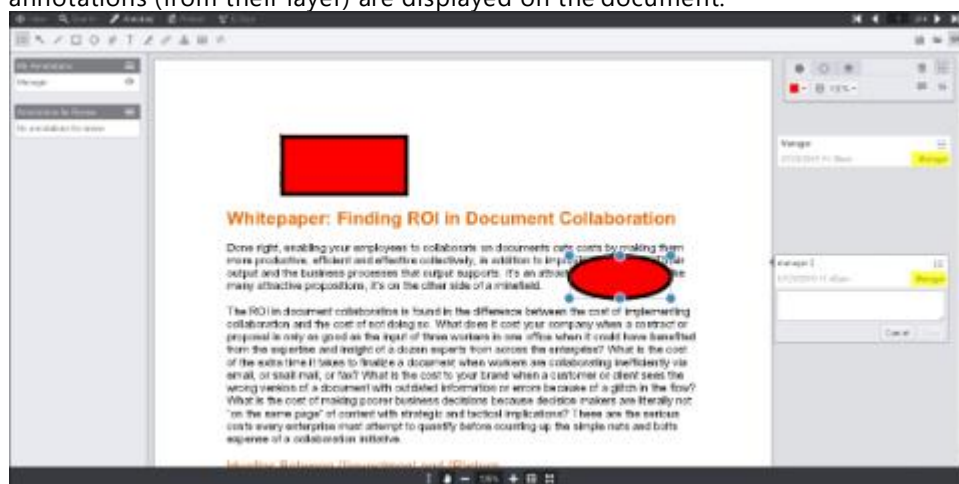
💡 The name of the layer that a comment belongs to is displayed next to the date and time in

> the comment (as shown above in the yellow highlighted area).

4. You can review their annotations and reply to their comments. You can also add your own annotations and comments to their layer:
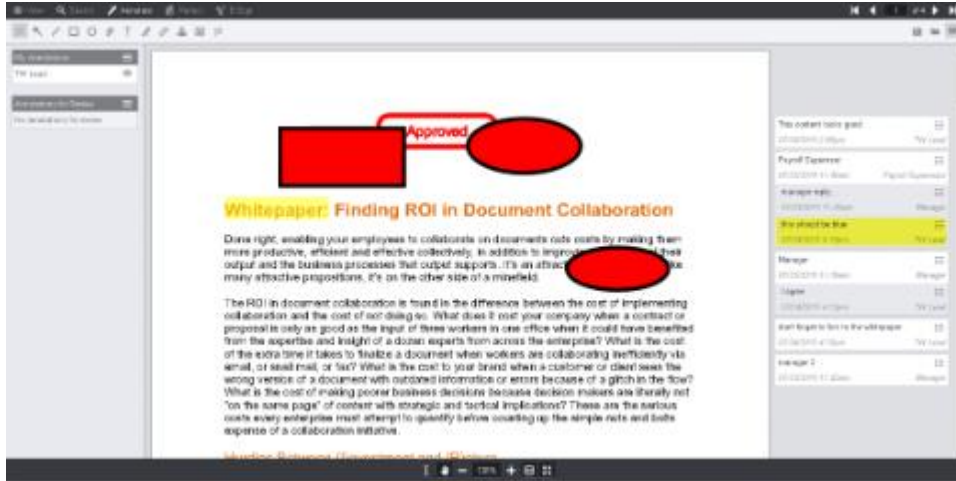
5. To save your changes, click on the **Annotation Layers** icon and select **Save Annotations**:
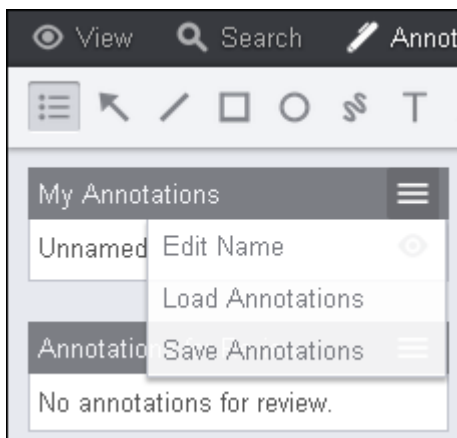
6. A green notification bar displays notifying you that your changes are now saved in that layer.

How to Edit the Name of an Annotation Layer under the 'My Annotations' Pane

1. Under **My Annotations**, click on the **Annotation Layers** icon and select **Edit Name**:
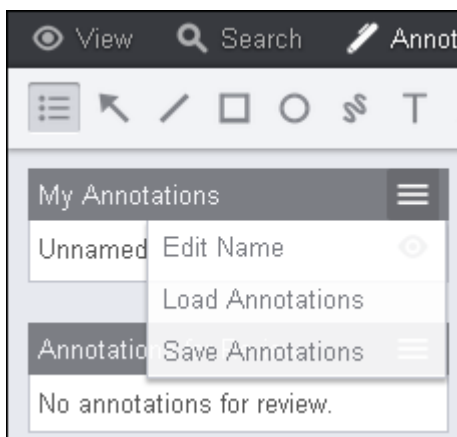
2. Add a **Layer Name** in the field and then press **Enter**:
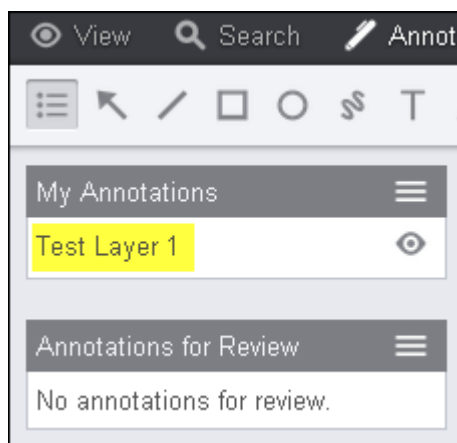
How to Hide an Annotation Layer under the 'My Annotations' Pane

1. Under **My Annotations**, click on the **Eye** icon to toggle hide/show annotation layers on or off:

   Annotation layers showing:
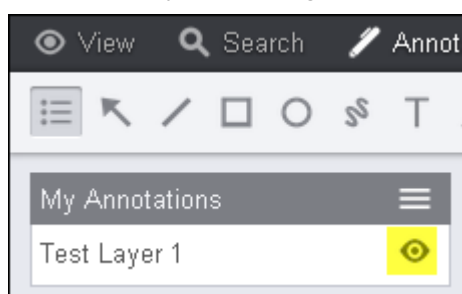
   Annotation layers hidden:
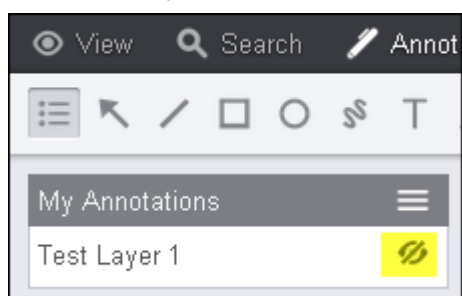
💡 If you hide a layer that contains redactions, those redactions will not save with the document.

The 'Annotations for Review' Pane

How to Load and Review Annotations from the 'Annotations for Review' Pane

1. Under **Annotations for Review**, click on the **Annotation Layers** icon and five options display (Load Annotations, Show All, Hide All, Merge Annotations, and Merge All Annotations):
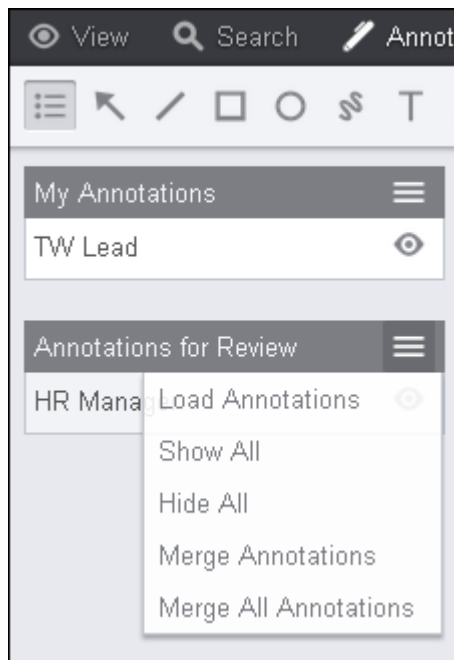
2. Click on **Load Annotations** and a list of annotations for review are displayed:
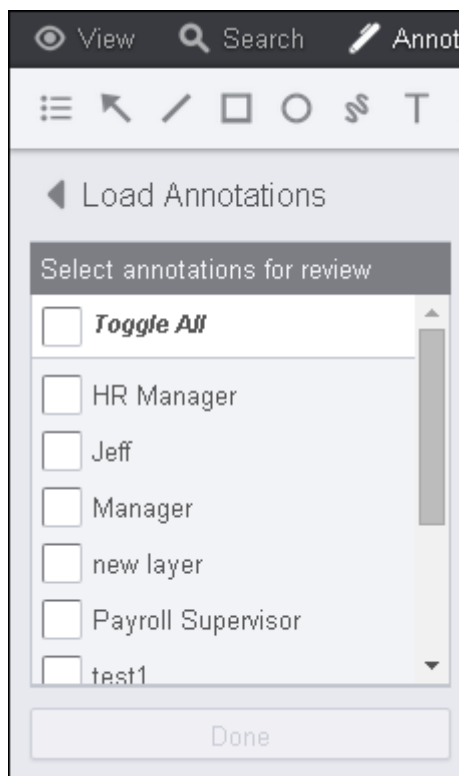
3. If you want to select **all the annotations** for review, select **Toggle All** and click **Done**:
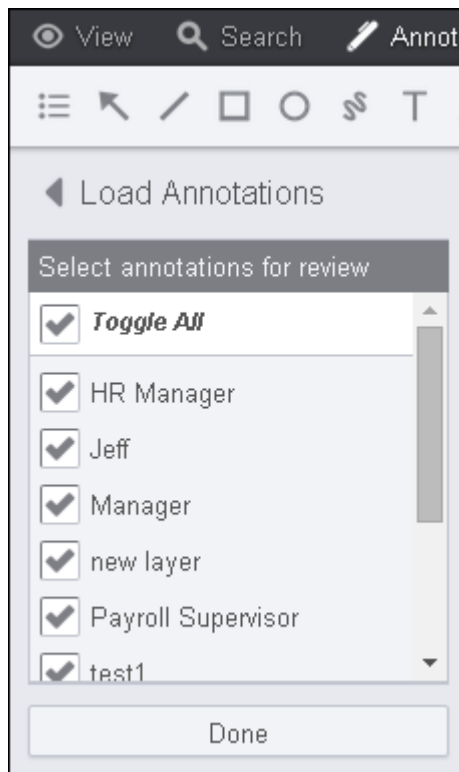
Or if you only want to load and review specific annotations, select the **checkbox** in front of each set of annotations you want to review and click **Done**:
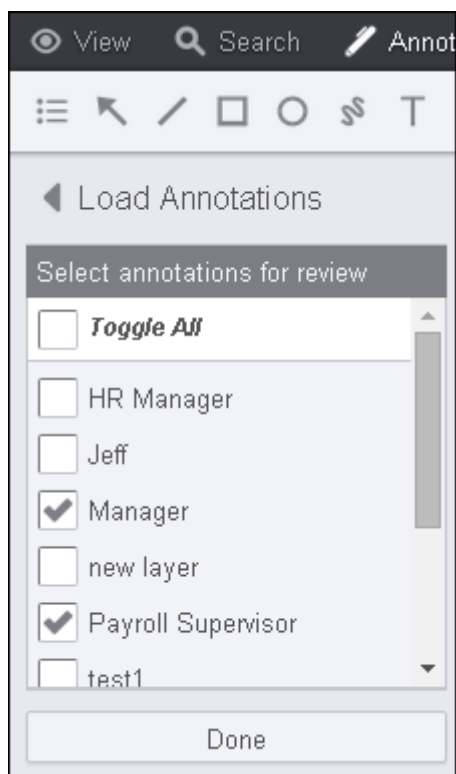
How to Show & Hide Annotations from the 'Annotations for Review' Pane

1. To show all annotations, click on the **Annotation Layers** icon and select **Show All**:
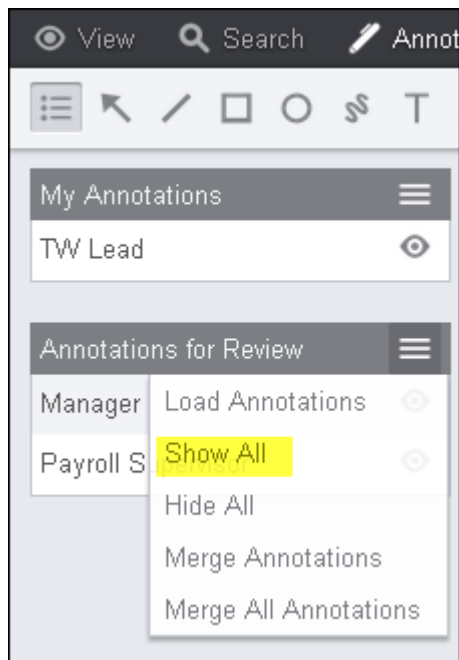
The Eye icon is displayed:
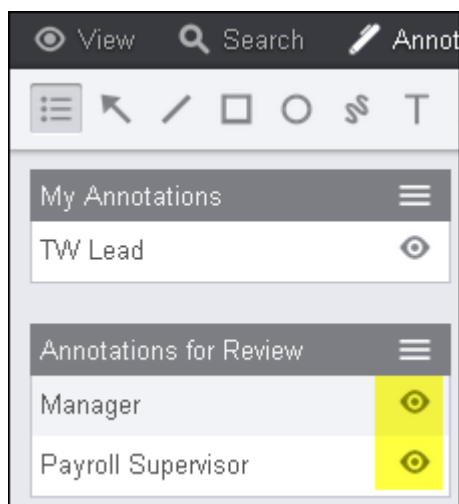
2. To hide all annotations, click on the **Annotation Layers** icon and select **Hide All**:
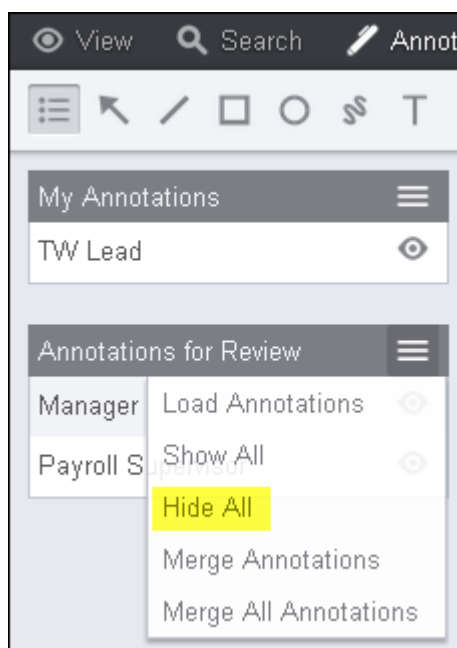
The Eye icon is displayed showing they are now hidden:
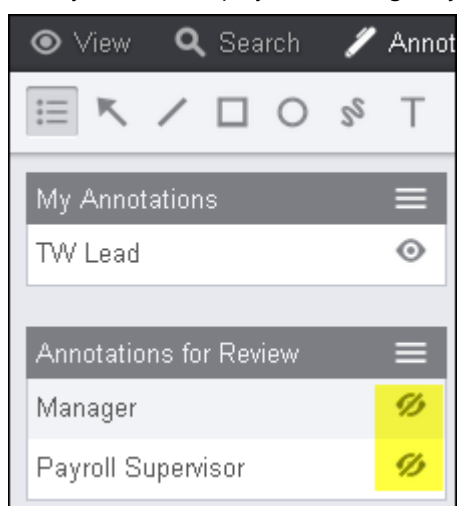
💡 If you hide a layer that contains redactions, those redactions will not burn with the document.

How to Merge Annotations from the 'Annotations for Review' Pane

Note that when you merge annotations from one layer to another layer, the original layer name will stay with any comments made in the original layer.

1. To merge annotations, click on the **Annotation Layers** icon and select **Merge Annotations**:
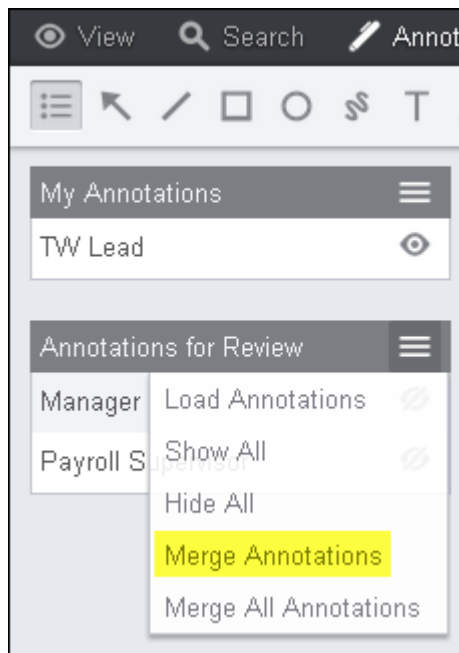
2. To select all annotations, select **Toggle All**:
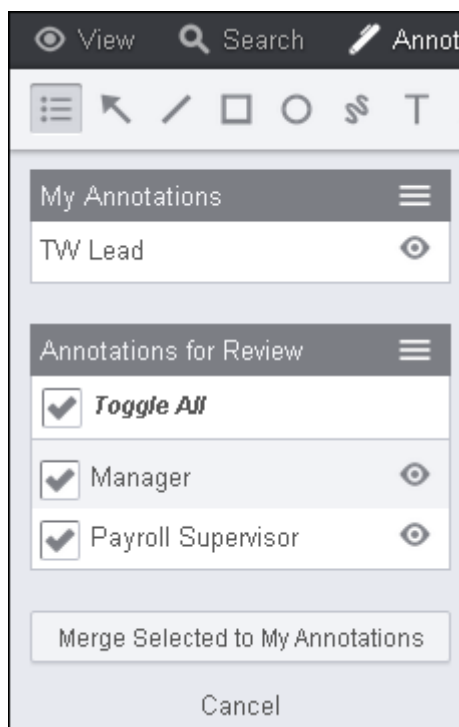
If you want to select specific annotations, select the **checkbox** in front of the annotations you want to merge:
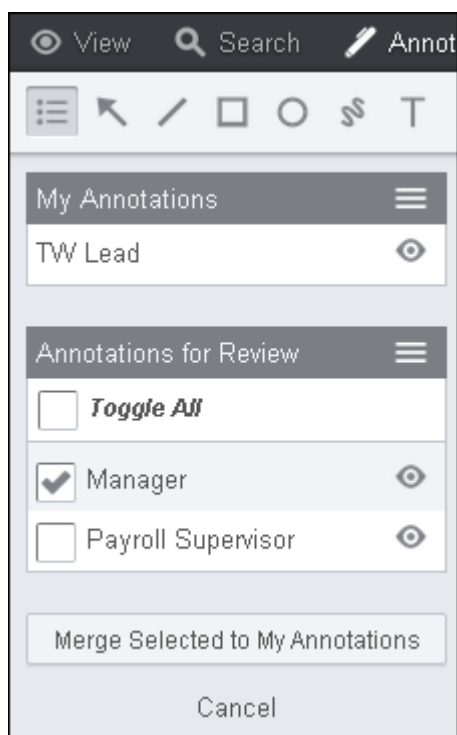
3. When you are done making your selections, click **Merge Selected to My Annotations**. The annotations that you selected have been merged with your annotations.

How to Merge all Annotations from the 'Annotations for Review' Pane

Note that when you merge annotations from one layer to another layer, the original layer name will stay with any comments made in the original layer.

1. To merge all annotations, click on the **Annotation Layers** icon and select **Merge All Annotations**:
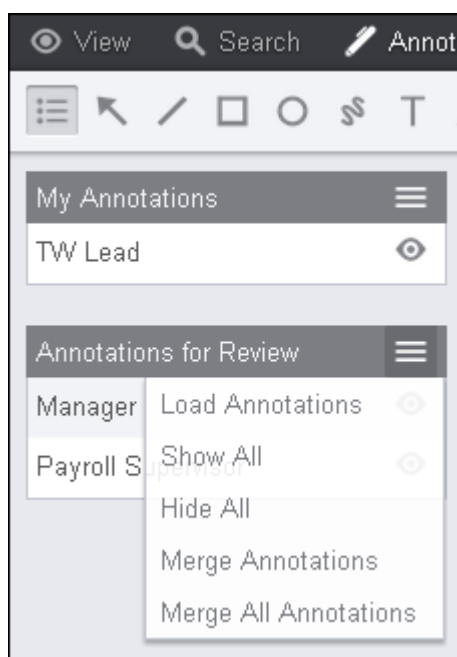
All annotations have been merged with your annotations.

Load Annotations

Loading Previously Saved Annotations

To load previously saved annotations, follow the steps shown below:
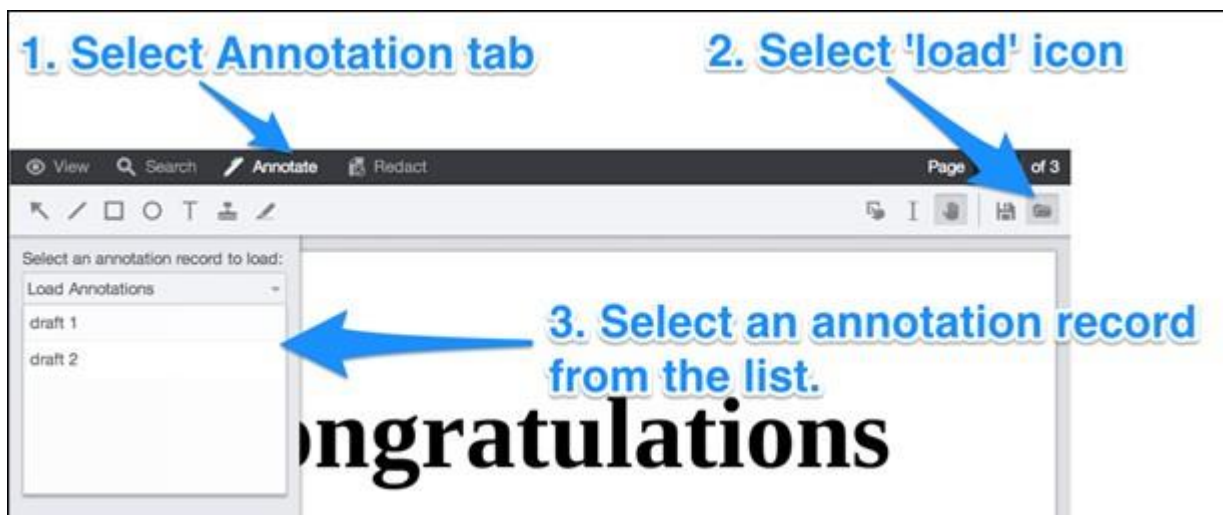
If no pre-existing annotation files exist for the loaded document, the message shown below appears. Also, the annotation file selection list will be disabled:
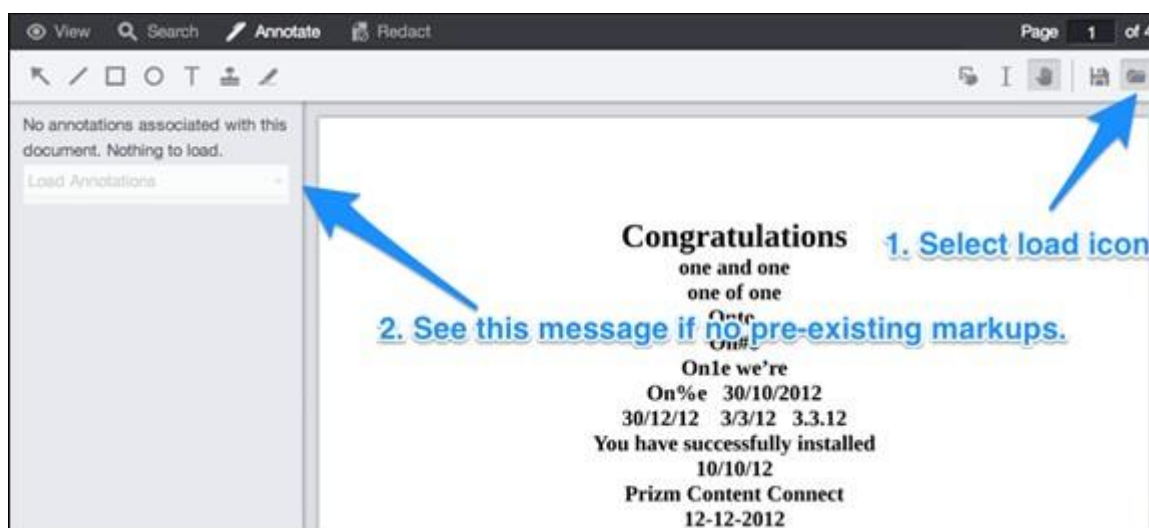
The **Unsaved** warning dialog below appears if you attempt to load an annotation file and might lose existing, unsaved annotations. To continue, select from one of the three available options:

Message displayed if you try to load an annotation record with unsaved annotation updates in the viewer.
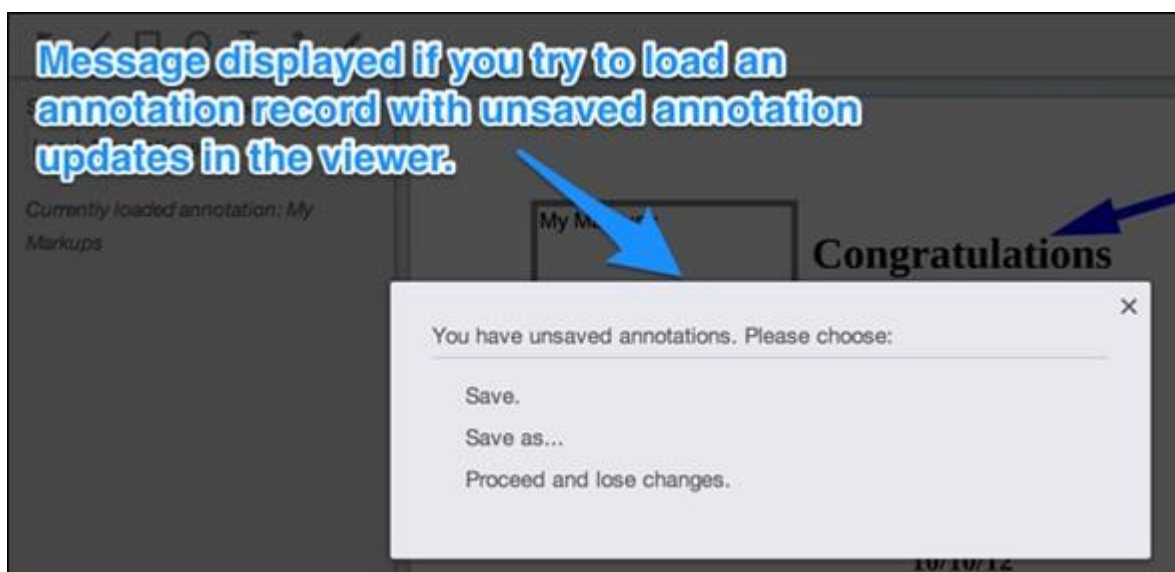
Save Annotations

Saving Annotations

After adding annotations to a document, you can save the annotations for later use by following the steps shown below:

If no annotations have been added, modified, or deleted from the loaded document, the **Nothing to Save** message appears:
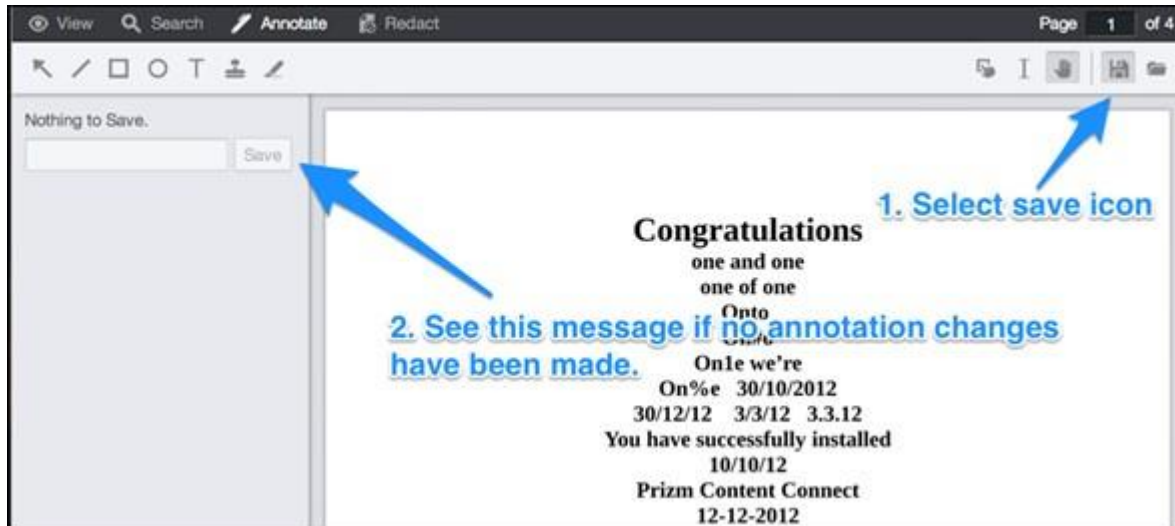
If you attempt to save annotations with a pre-existing file name, you will be prompted as shown below. To continue, select from one of the three available options:
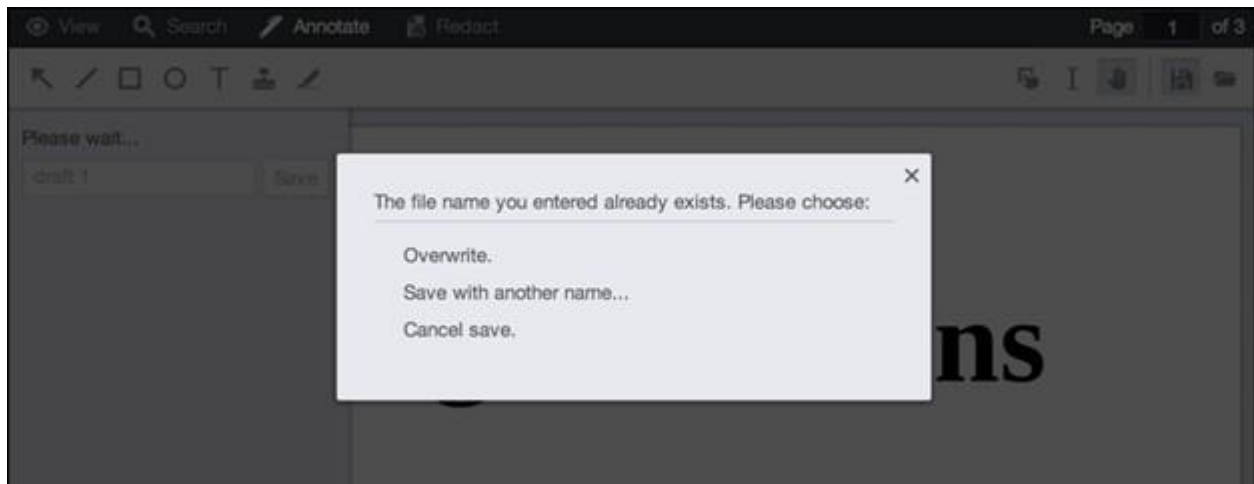
Redact Documents

This section explains how to add, modify, and delete redactions, use redaction reasons and the redaction view mode:

- Create a Full Page Redaction
- Use Redaction Reasons

Create a Full Page Redaction

You can create a full page redaction in your document. You have the option to redact the current page, all pages or a range of pages and you can select a Redaction Reason to apply to the pages that will be redacted. The Redact Full Pages mouse tool is available from the Redact menu:

To create a full page redaction:

1. Click on **Redact Full Pages** on the Redact menu. The Redact Full Pages dialog box displays:
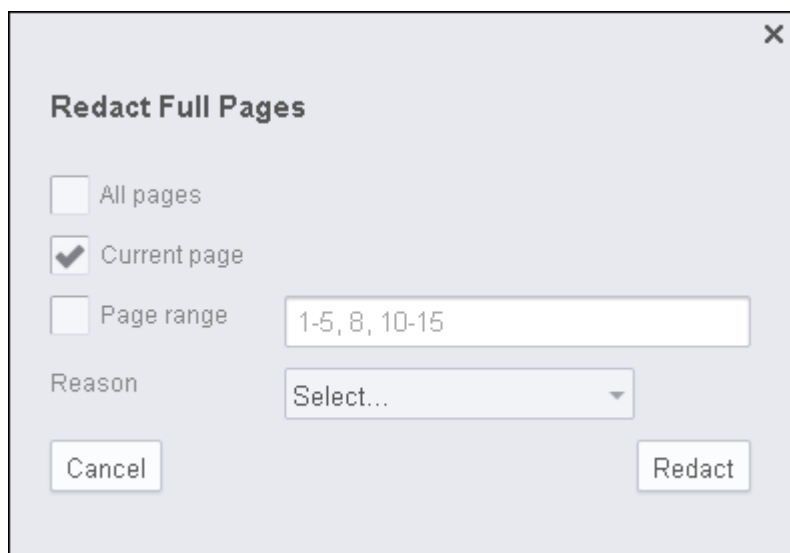
2. Select either **Current Page** (default), **All Pages** or **Page Range**.

3. If you want to apply a Redaction Reason, click on the **drop-down** and select **the reason**:
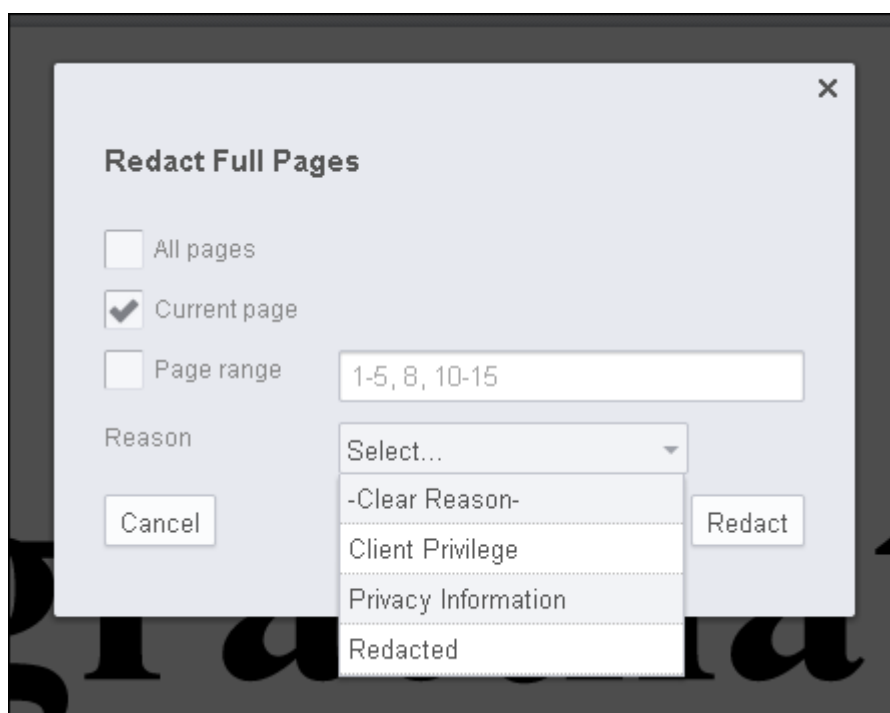
4. When you have finished making your selection, click **Redact**. The Full Page Redaction is applied to your document.

   You can print and review redacted text in a document by selecting the 'Review Redacted Text'

checkbox on the Print dialog box. The Print button is available on the View menu.

To delete a full page redaction:

1. Click on the page that has the full page redaction. An immediate action menu displays:
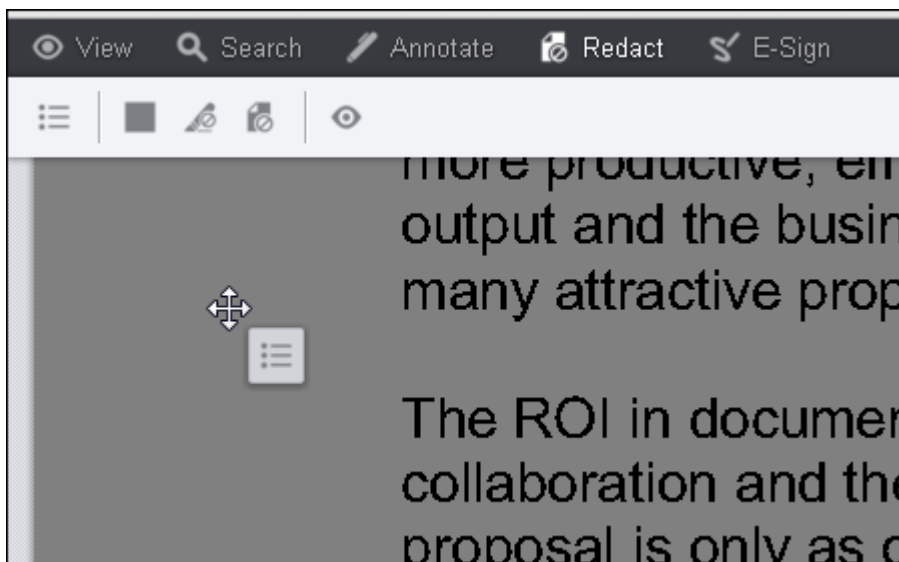
2. Click on the immediate action menu and select **Delete**:
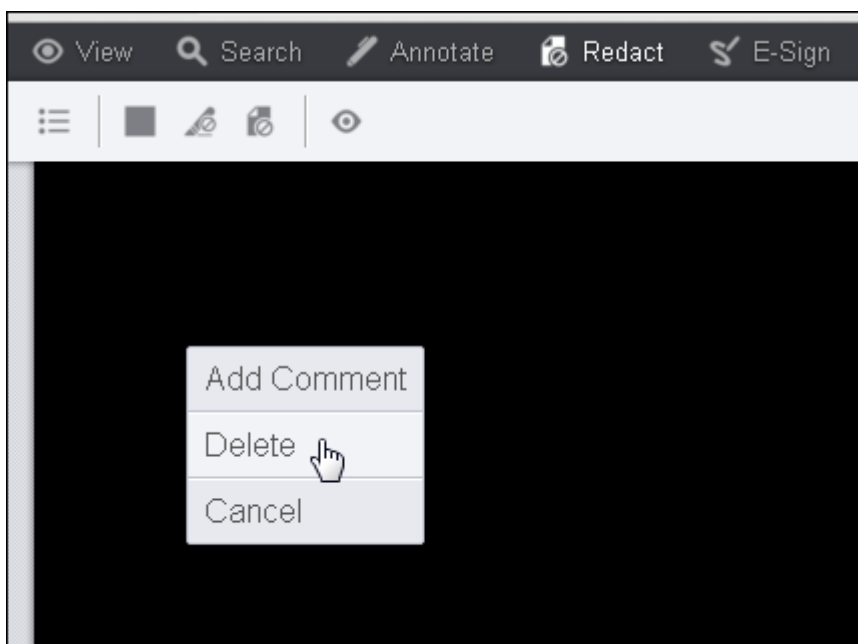
Note that you can only delete one full page redaction at a time. If you have more full page redactions in the document to delete, you must go to that page and repeat steps 1 and 2 above.

Use Redaction Reasons

Redaction reasons allow you to redact content and add a redaction reason. You can add redactions in bulk mode (also known as "sticky mode"). With multiple redaction reasons enabled, you can apply multiple reasons selected from the list to any redaction. Refer to the PrizmDoc Viewer topic, [Enable Redaction Reasons](#) for more information on how to customize Redaction Reasons.

What happens to the redaction reasons text:

- It is displayed over the redacted text.
- It is burned into the document.
- It can be saved to PDF and printed out.

Redaction reasons are available under the Redaction menu:
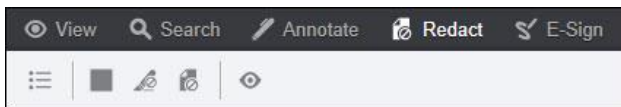
> 📑 Redaction Reasons are not viewable when the Redaction View Mode is turned on.

To Add & Save a Redaction Reason to a Document

Redaction reasons are available with the following redactions: **Filled Rectangle**, **Text Selection**, and **Full Page**. The following instructions use the **Text Selection** redaction as the example.

1. Click on the **Text Selection** redaction icon:
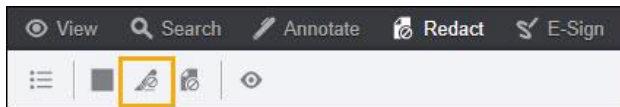
2. Select the **text** you want to redact and a Context menu displays:
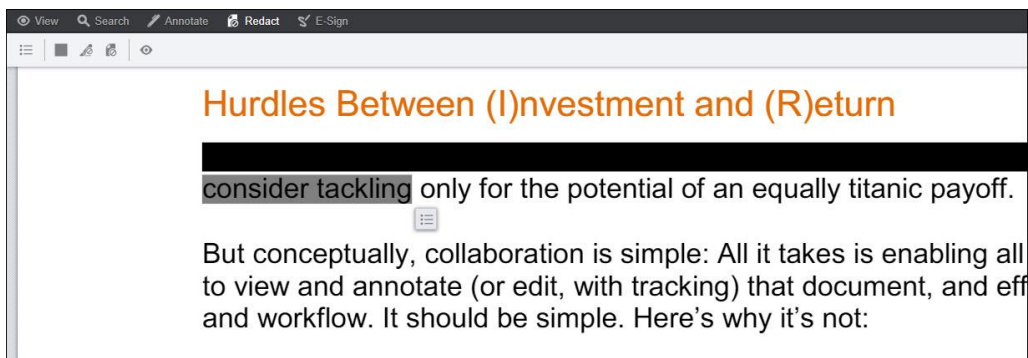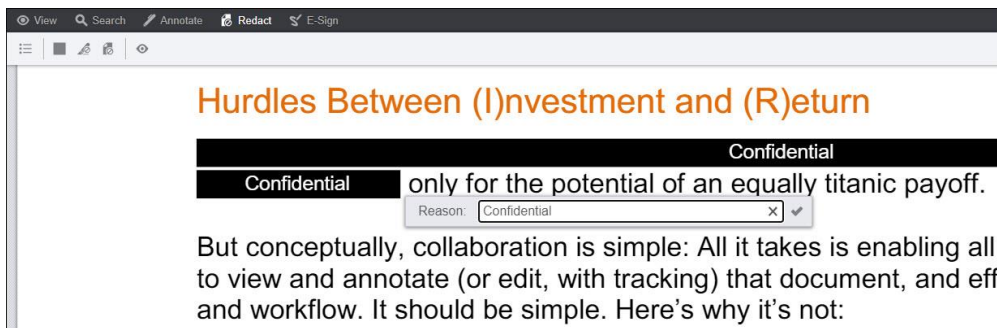

3. Hover over the **Context** menu and the available options display:
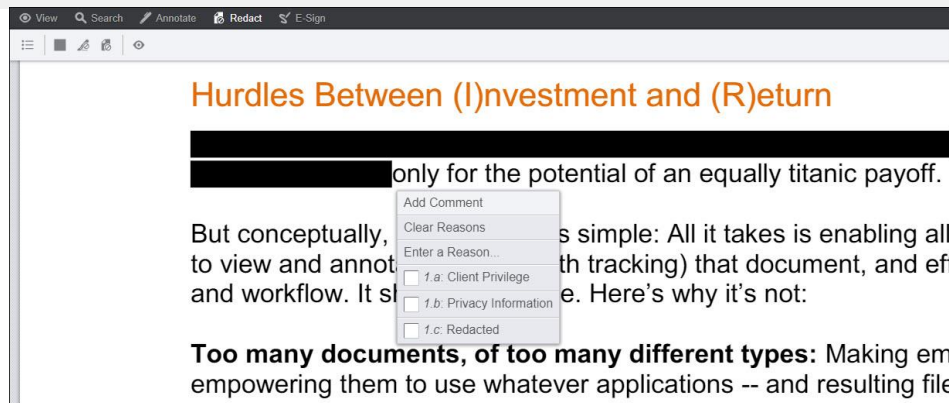
4. Select the **Redaction Reason(s)** you want to apply:
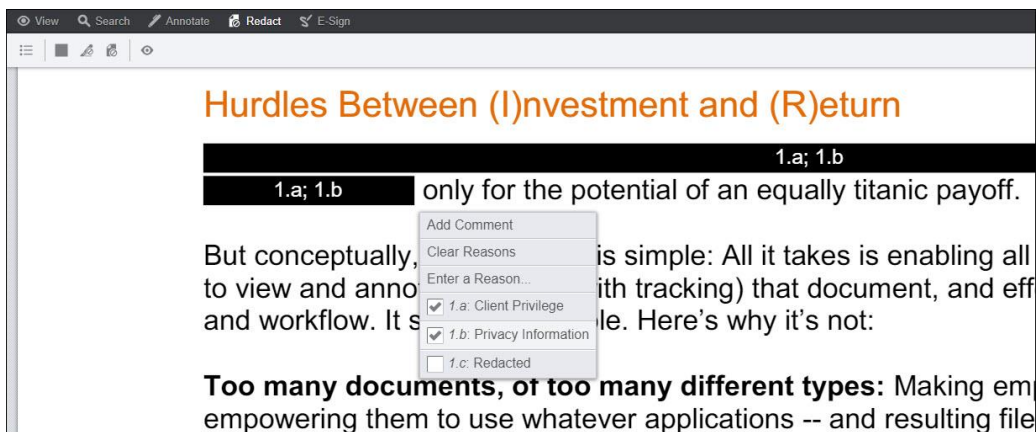
5. Or, you can select **Enter a reason...** to create your own custom redaction reason and then click on the **checkmark** to apply the reason:

> If you hover over the redaction, it is transparent. Note that the redaction reason text is displayed in the redacted area. If there are multiple lines of redacted text, the reason is displayed on each line of text.

6. To edit the **Redaction Reason(s)**, click on the **Redaction** and the Context menu displays:
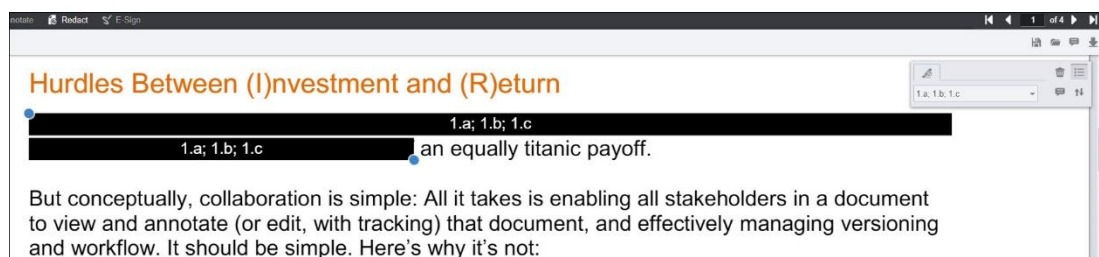
Click the **drop-down** to select another **Redaction Reason** or edit the **Custom Reason**. You can also add a comment or delete the Redaction from the Comments menu.

7. When you are ready to save your redactions, click the **Save** icon:

8. The **Save Annotations** panel displays on the left-hand side of the Viewer:
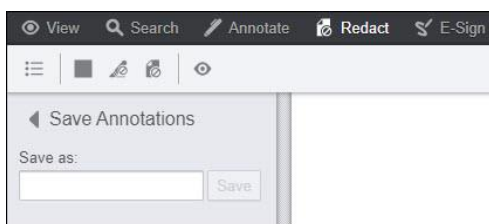
9. In the **Save as:** field, enter a name for the redaction and click **Save**:
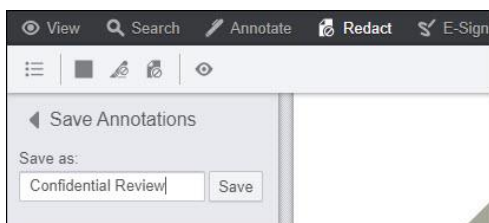
To Apply Redaction Reasons in Bulk to a Document

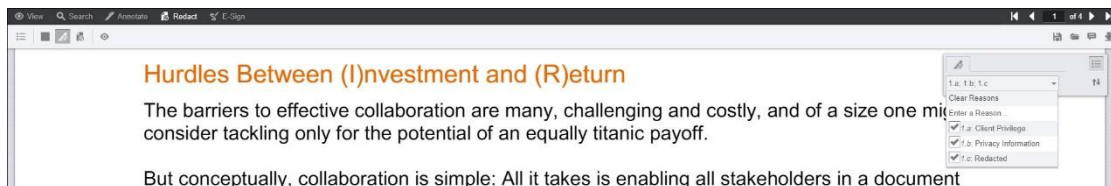This section explains how you can easily add mulptiple redactions with the same set of reasons.

1. Double-click on the **Text Selection** redaction icon which turns on the bulk mode:
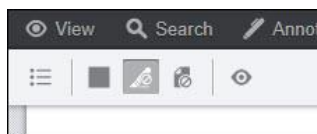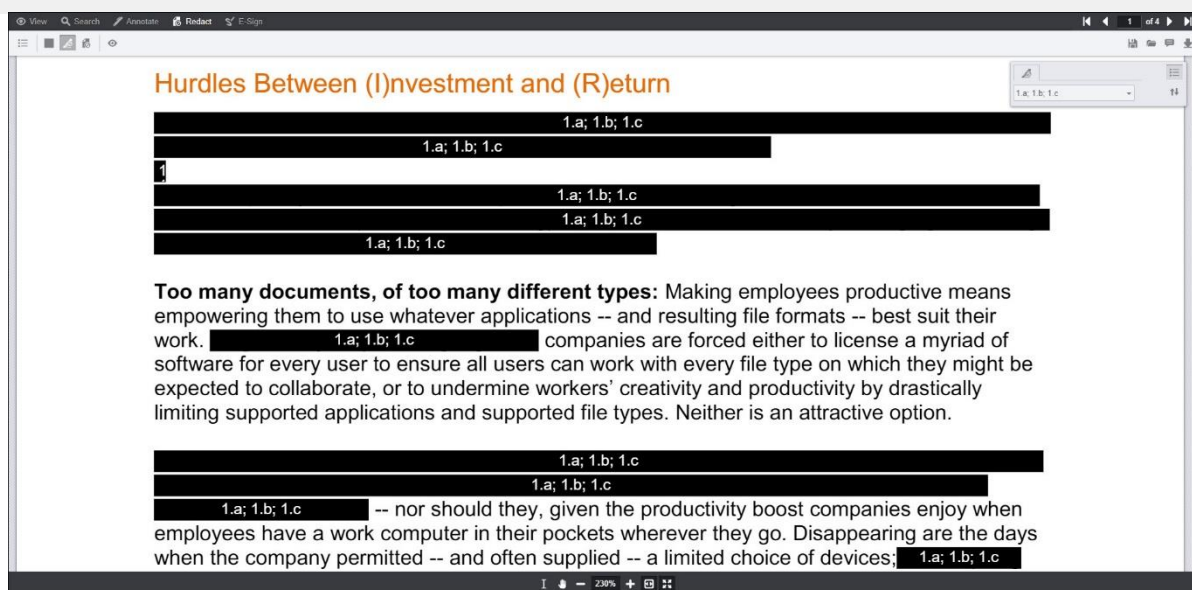

2. On the right-hand side of the Viewer UI, the **Context** menu displays:
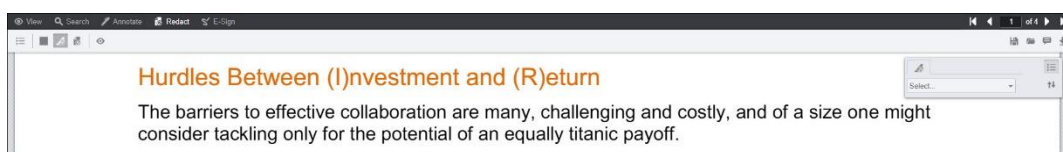
3. From the drop-down menu, select the **Redaction Reasons** you want to use:

4. Now you can **select text** throughout the document and the multiple redaction reasons will be applied:

Use the Comment Feature

This section explains the purpose of the comment viewing modes, and how to add, edit, or delete comments on your own layer, and how to respond to comments on other layers:

- Use Annotation Comments
- Use E-Signature Comments
- Use Redaction Comments
- Use Skinny Comments

Use Annotation Comments

Comments are available under the Annotate menu. You can add, edit or delete a comment for the following annotations: image stamp, arrow, line, rectangle, ellipse, text, freehand, stamp and highlight.

> When in Horizontal Layout Mode, comments are not supported in the Viewer.

The following example shows comments displayed in the Viewer:
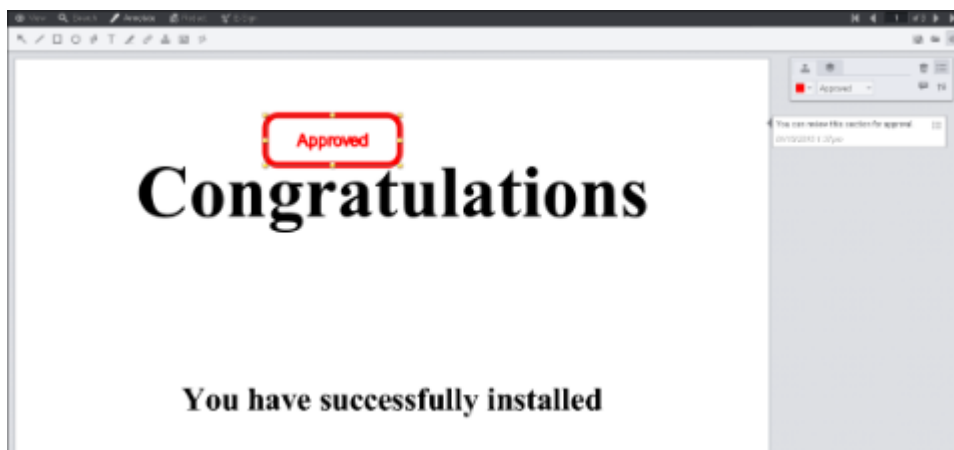
Note that you can hide or show the comments by clicking on the Comments Panel icon located in the upper right-hand corner of the Viewer:

To Add a Comment to an Annotation

1. Select the **annotation** you want to use and draw it on the document.
2. A **mini-content menu** immediately displays near the bottom right of the annotation:

3. Hover over the **mini-context menu** and the following options are displayed: **Add Comment**, **Select** or **Cancel**:

4. Select **Add Comment**. A text box displays to the right of the document:

5. Type in your **comment** and click **Done**.

To Add a Comment to an Existing Annotation

1. Click on an **existing annotation**. A context menu displays to the right of the document:

2. Select the **Comment icon**. A text box displays to the right of the document:

```
Type comment here



                                    Cancel    Done
```

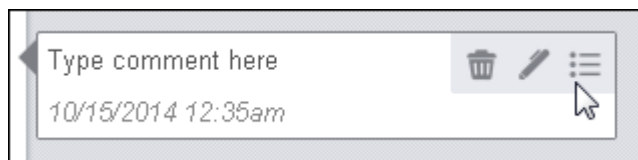3. Type in your **comment** and click **Done**.

To Edit a Comment

1. Click on an **existing annotation**. The comment box displays to the right of the document:

```
Type comment here



                                    Cancel    Done
```

2. Hover over the **context menu** on the comment box. Click on the **Pen icon**:

```
◄  Type comment here              🗑 ✎ ☰
   10/15/2014 12:35am
```

3. Make your edits to the **comment** and click **Done**.

To Delete a Comment

1. Click on an **existing annotation**. The comment box displays to the right of the document:

```
Type comment here



                                    Cancel    Done
```

2. Hover over the **context menu** on the comment box:

```
◄  Type comment here              🗑 ✎ ☰
   10/15/2014 12:35am
```

3. Click on the **Trash icon** to delete the comment.

Use E-Signature Comments

Comments are available under the E-Signature menu. You can add, edit or delete a comment for the following eSignatures: Freehand, Text and Place Date.

 When in Horizontal Layout Mode, comments are not supported in the Viewer.

The following example shows comments displayed in the Viewer:

Note that you can hide or show the comments by clicking on the Comments Panel icon located in the upper right-hand corner of the Viewer:
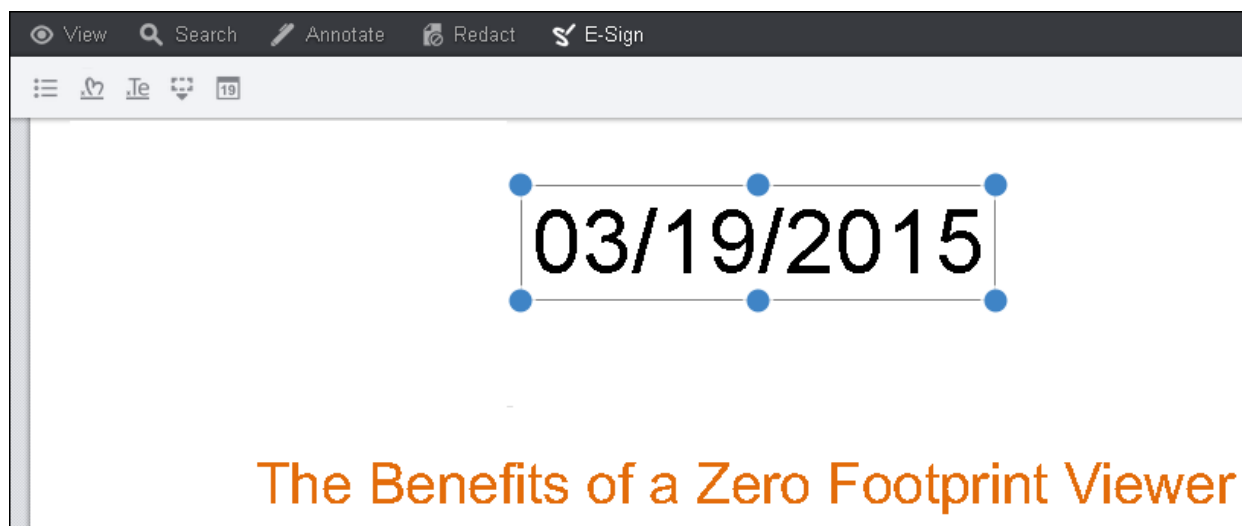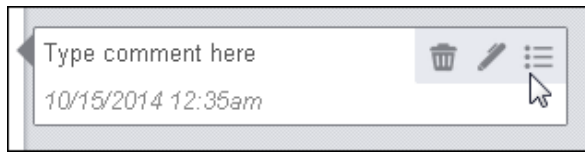

To Add a Comment to an E-Signature

This section uses the **Place Date** E-Signature as an example. You can also add comments to the Freehand and Text eSignatures.

1. Select the **Place Date** E-Signature you want to use and draw it on the document:
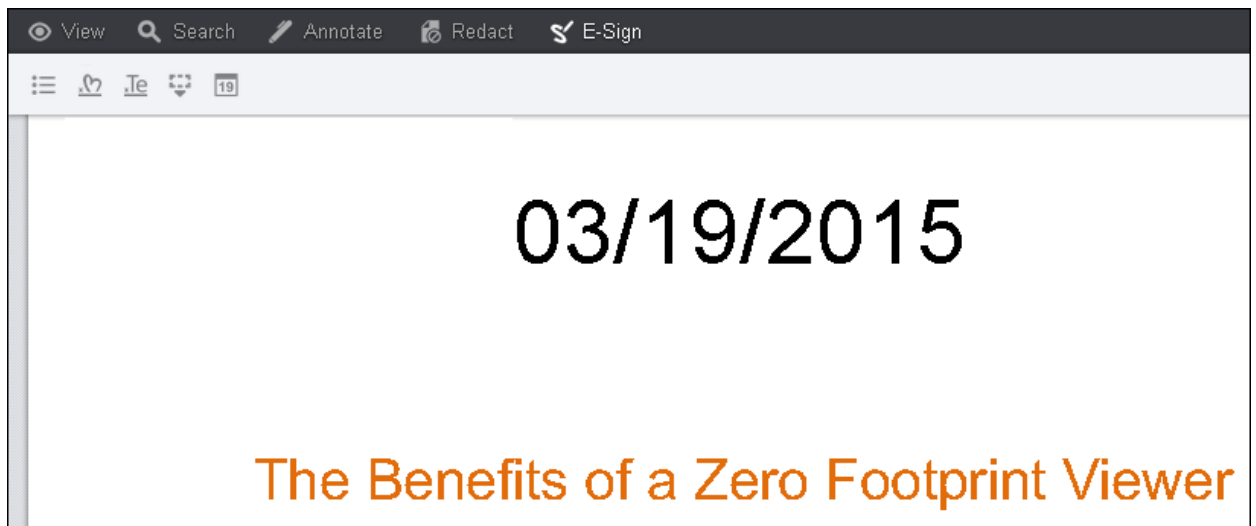
2. Click on the **Date** and the comment box appears to the right:

3. Click on the **Comment** icon in the comment box. A text box displays:

4. Type in your **comment** and click **Done**.

To Add a Comment to an Existing E-Signature

1. Click on an **existing E-Signature**. A context menu displays to the right of the document:

2. Select the **Comment icon**. A text box displays to the right of the document:

3. Type in your **comment** and click **Done**.

To Edit a Comment

1. Click on an **existing E-Signature**. The comment box displays to the right of the document:

2. Hover over the **context menu** on the comment box. Click on the **Pen icon**:

3. Make your edits to the **comment** and click **Done**.

To Delete a Comment

1. Click on an **existing E-Signature**. The comment box displays to the right of the document:

2. Hover over the **context menu** on the comment box:
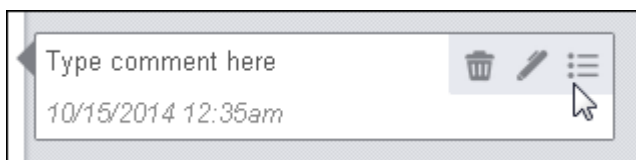

3. Click on the **Trash icon** to delete the comment.

Use Redaction Comments

Comments are available under the Redact menu. You can add, edit or delete a comment for the following redactions: image stamp, filled rectangle, transparent rectangle, text, stamp, and text selection.

> When in Horizontal Layout Mode, comments are not supported in the Viewer.

The following example shows comments displayed in the Viewer:
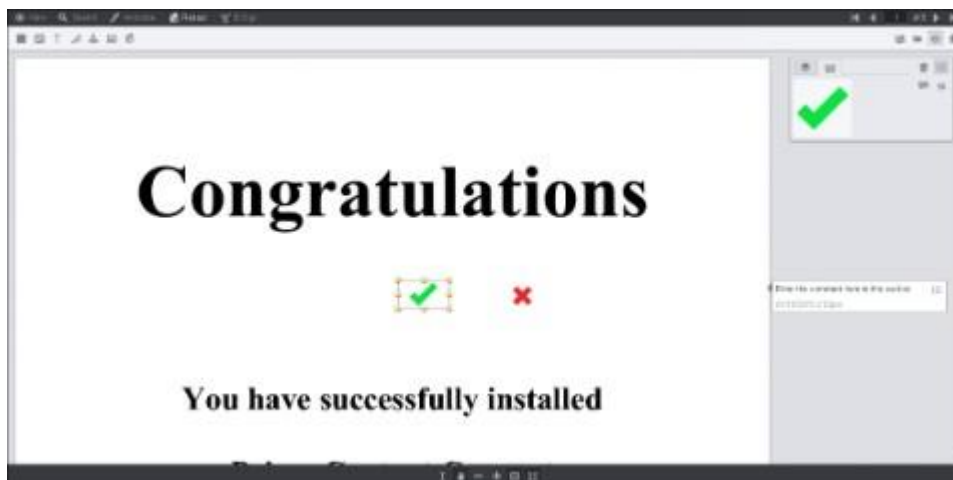
Note that you can hide or show the comments by clicking on the Comments Panel icon located in the upper right-hand corner of the Viewer:

To Add a Comment to a Redaction

1. Select the **redaction** you want to use and draw it on the document.
2. A **mini-content menu** immediately displays near the bottom right of the redaction:

3. Hover over the **mini-context menu** and the following options are displayed: **Add Comment**, **Select** or **Cancel**:

4. Select **Add Comment**. A text box displays to the right of the document:

5. Type in your **comment** and click **Done**.

To Add a Comment to an Existing Redaction

1. Click on an **existing redaction**. A context menu displays to the right of the document:

2. Select the **Comment icon**. A text box displays to the right of the document:
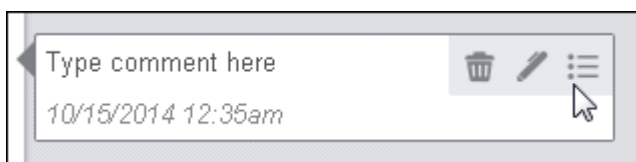

3. Type in your **comment** and click **Done**.

To Edit a Comment

1. Click on an **existing redaction**. The comment box displays to the right of the document:

2. Hover over the **context menu** on the comment box. Click on the **Pen icon**:

3. Make your edits to the **comment** and click **Done**.

To Delete a Comment

1. Click on an **existing redaction**. The comment box displays to the right of the document:

2. Hover over the **context menu** on the comment box:

3. Click on the **Trash icon** to delete the comment.

Use Skinny Comments

By default, the Viewer automatically chooses to display either the Skinny or Full Comments panel based on the size of the Viewer pane. Additional components, such as whether or not the Search or Thumbnail panels are open, can affect which Comments panel is displayed.

An example of the Full Comments panel:
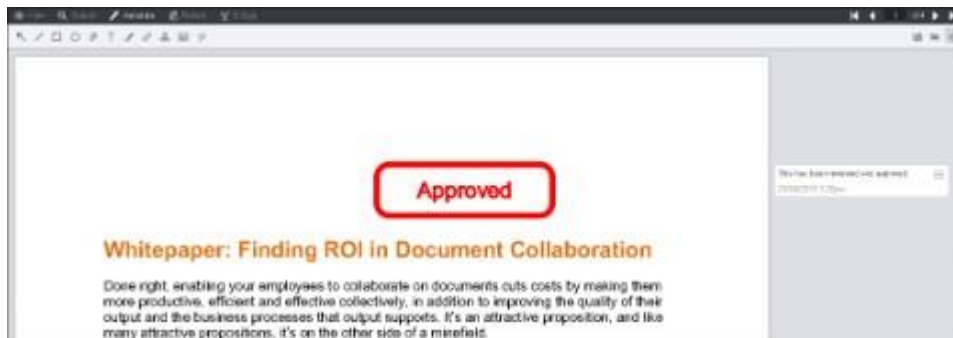
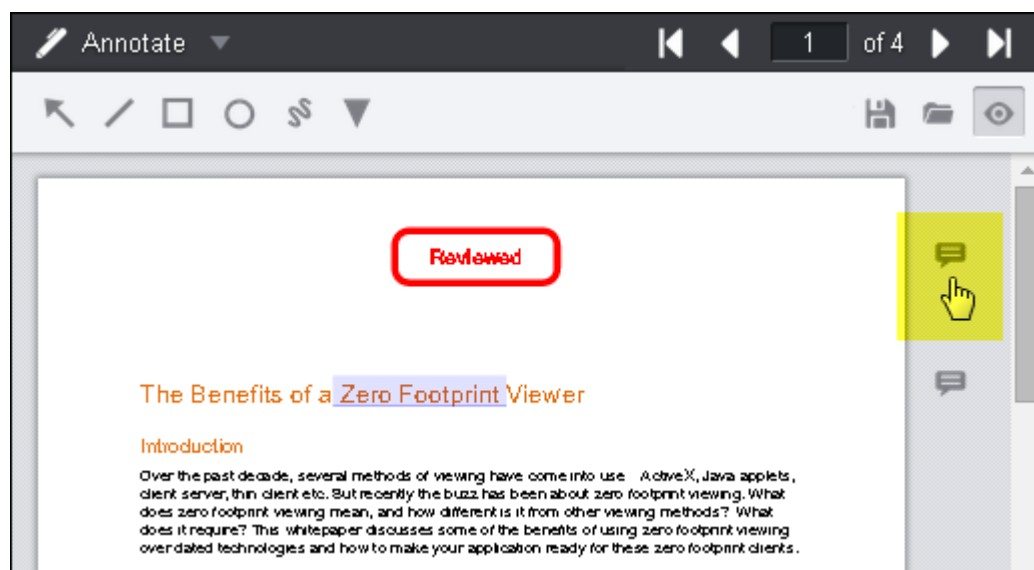An example of the Skinny Comments panel highlighted in yellow below:
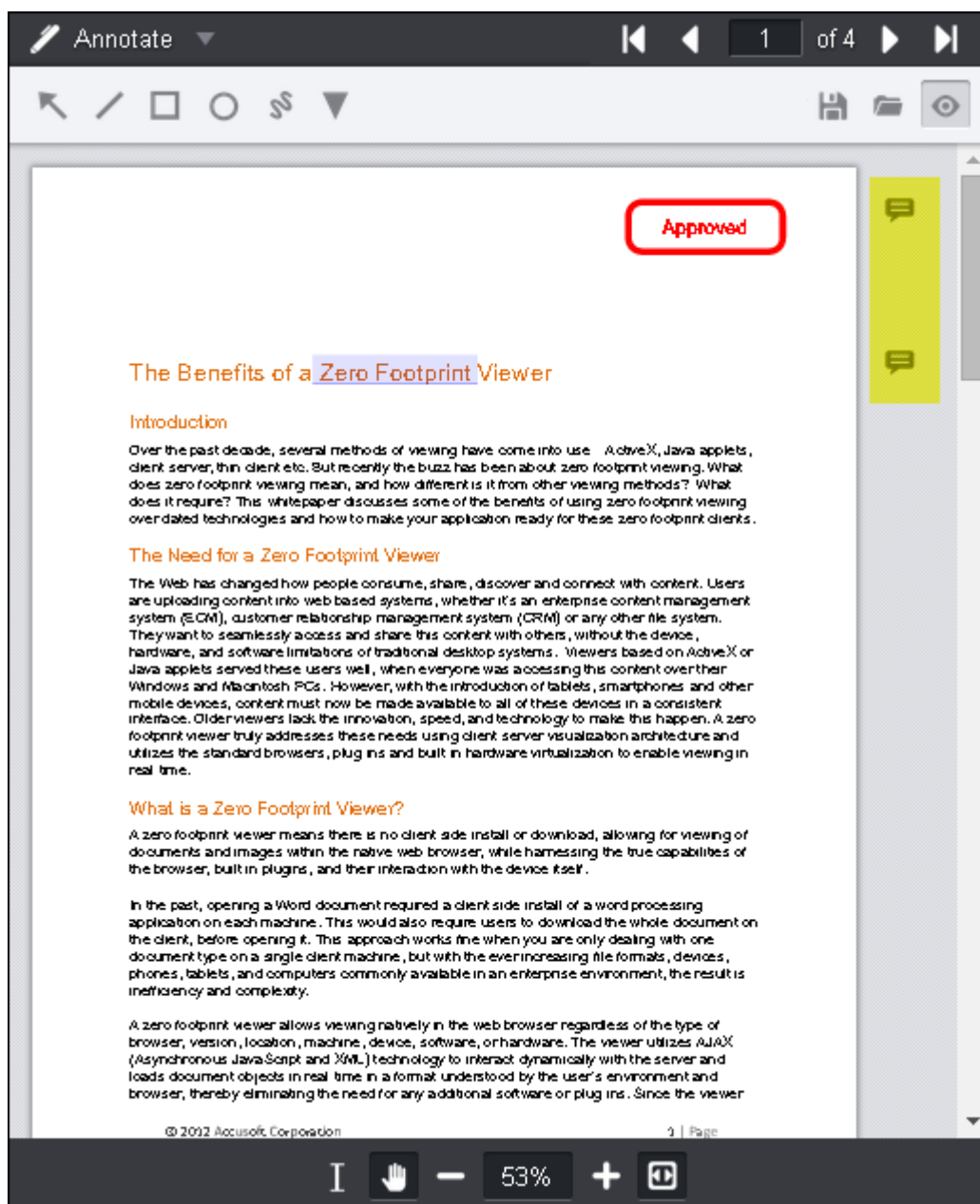
Note that you can hide or show the comments by clicking on the Comments Panel icon located in the upper right-hand corner of the Viewer:

To view or edit Skinny comments
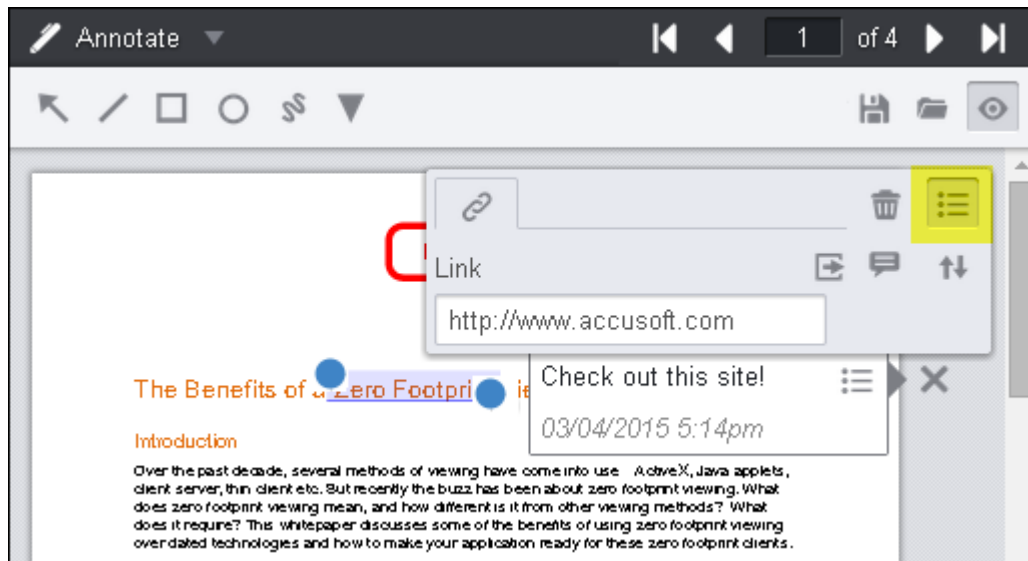
1. Click on the **Comment icon**:

The comment box is displayed:
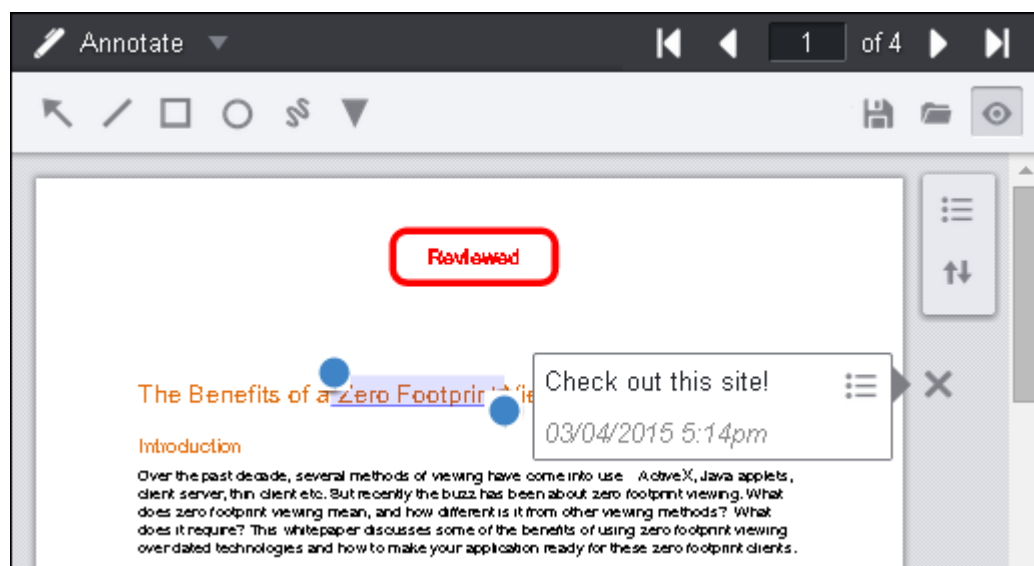
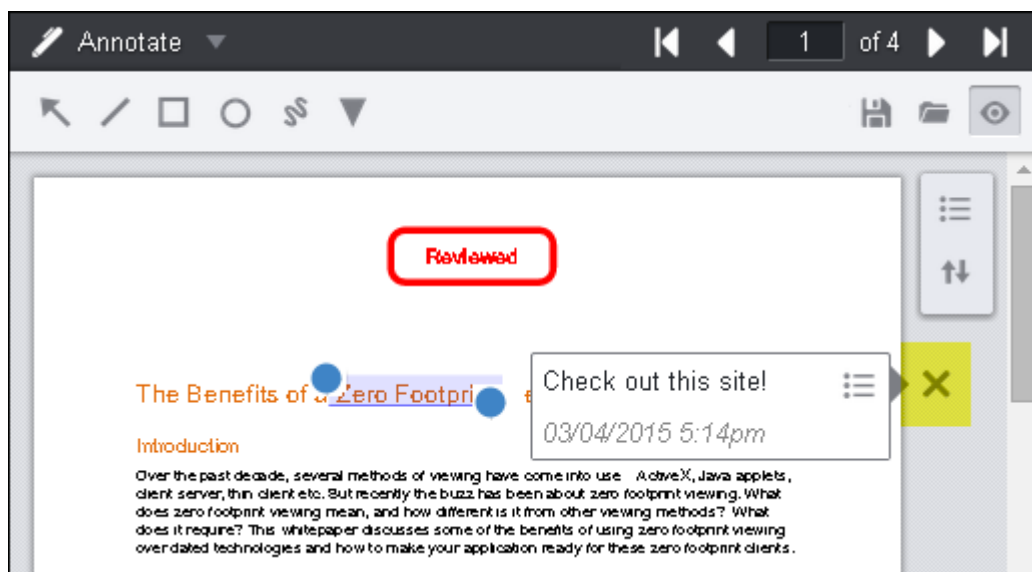2. The **Options** and **Move Menu icons** display next to the comments:
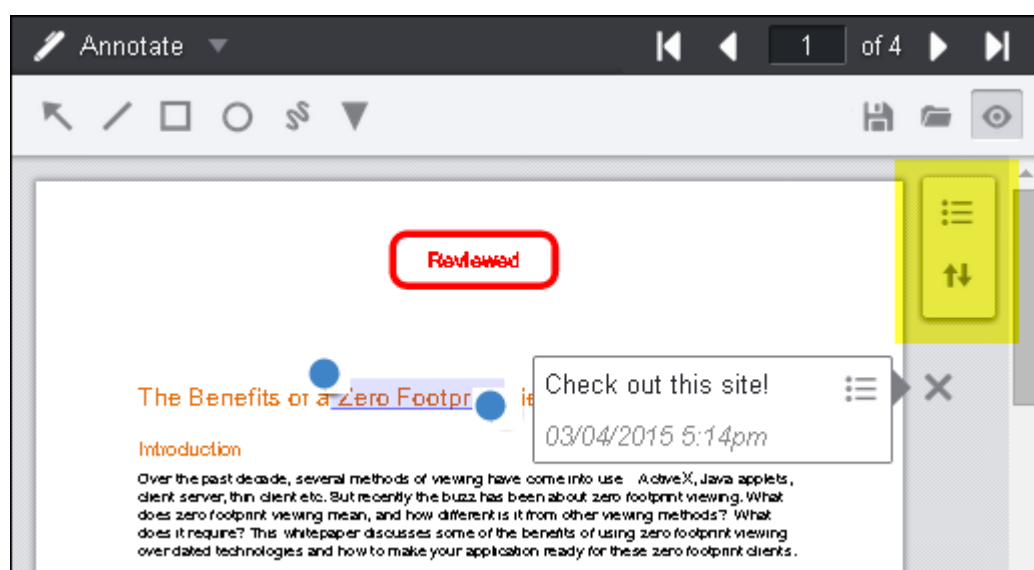
3. Click on the **Options icon** and the Options context menu is displayed:

Make the desired changes.

4. Click on the **"X" icon** and the Option menu is minimized:

Print Documents

The Viewer enables you to print documents using various settings:

- Page Range
- Page Orientation
- Paper Size
- Auto Fit Margins
- Annotations
- Redactions
- Headers, Footers and Margins
- Comments

- Redactions Reasons

> When attempting to print a document with a large number of pages (around 100 or more), the browser may run out of available memory and return an error, exit abruptly, or behave unexpectedly. If you are experiencing issues when trying to print, you can try printing the document in parts (separated by page ranges), or you can download the document from the Viewer and load it into a local application to print.

To print a document:

1. To open the print menu, click on the **Print** button:
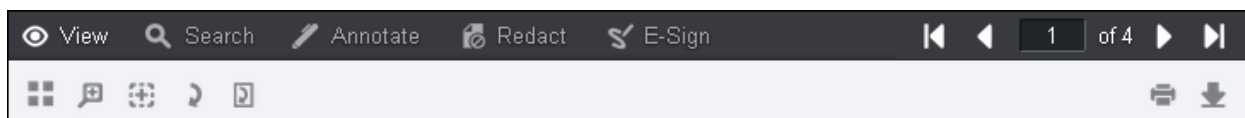
2. Select your print **options**:
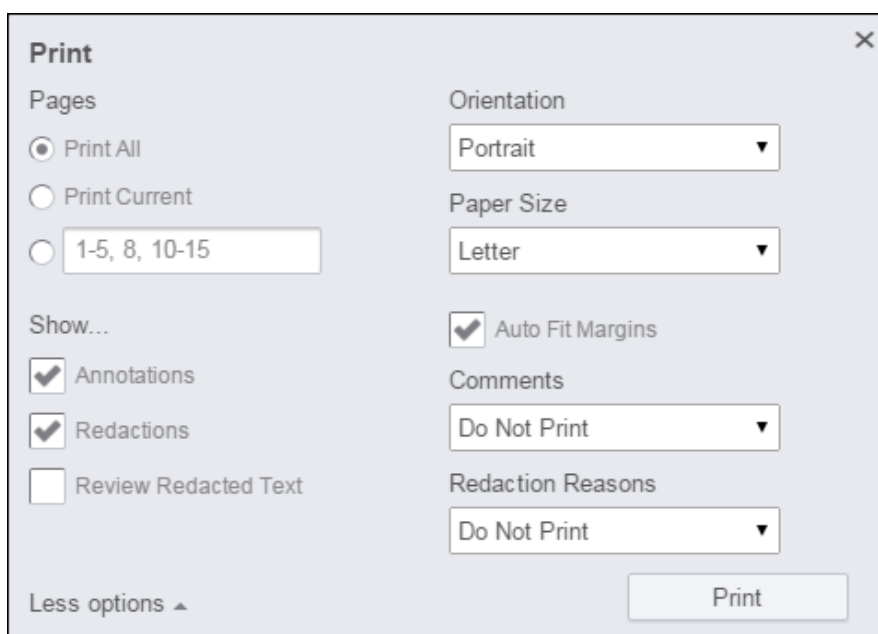
3. Click **Print**.

Additional Printing Information

Page Range

Within the print menu, a user may specify a single page to print or multiple pages. Individual pages and page ranges need to be separated by a comma (,). Pages within a range should be separated by a dash (-). Below are sample values that may be entered into the print-range input field:

- 1
- 1, 3, 5, 8
- 1-3, 5, 8
- 1-3, 5, 8-10

Page Orientation

This option enables the user to set the document orientation. When a document is loaded into the Viewer, the default

page orientation (Portrait or Landscape) is based on the dimension of the first page loaded. For example, if the dimension of the first page is Landscape, the Viewer will set the Landscape property in the viewer's Print menu.

> Users are required to manually set the page orientation within the system's Print Dialog menu. Even when a particular orientation has been set within the Viewer, the user will have to set the orientation within the system's Print Dialog menu once the content has been sent to the printer. Currently, Google Chrome is the only browser that is capable of detecting the appropriate page orientation.

Paper Size

You can select the desired paper size from the Paper Size drop-down.

> Users are required to manually set the page size within the system's Print Dialog menu. Even when a particular page size has been set within the Viewer, the user will have to set the page size within the system's Print Dialog menu once the content has been sent to the printer. Currently, Google Chrome is the only browser that is capable of detecting the appropriate page size.

Auto Fit Margins

This option chooses whether or not the Viewer should use the default browser margins. This is usually an issue with the Internet Explorer and Safari browsers:

- **On** - When necessary, the pages will be smaller, so that the entire page content can fit on one printed page. No extra user action is needed to adjust the margins. This is the default setting.
- **Off** - Content will always be printed as an 8.5 x 11 inch page. The user is expected to set the browser print margins to 0. See the section for "Headers, Footers, and Margins" below.

Annotations

This option chooses whether or not to include annotations in the printed document.

> Printing with annotations is not supported in Internet Explorer 8.

> Firefox does not support printing white or gray text by default; the text is instead printed black. To print white or gray text you must select the **Print Background (colors & images)** option in Firefox. You can do so by opening the Firefox menu, selecting **Print**, clicking the **Page Setup...** button, checking the **Print Background (colors & images)** option, and clicking the **OK** button.

Redactions

This option chooses whether or not to include redactions in the printed document. You can also choose to review the redacted text by selecting the Review Redacted Text checkbox.

> Firefox does not support printing white or gray text by default; the text is instead printed black. To print white or gray text you must select the **Print Background (colors & images)** option in Firefox. You can do so by opening the Firefox menu, selecting **Print**, clicking the **Page Setup...** button, checking the **Print Background (colors & images)** option, and clicking the **OK** button.

Headers, Footers and Margins

The Viewer's printing control is designed to optimize for the amount of space available on each piece of paper. The Viewer defines the margins within the CSS, however some settings within the user's browser may need to be altered in order to properly format the pages for printing. The following user actions need to use the "Auto Fit Margins: off" option:

Internet Explorer

In order to maximize the space available on each sheet of paper, verify that the Header and Footer have been set to

"Empty" and that "Print Background Colors and Images" has been checked within the browsers "Page Setup". To verify your settings in IE, go to Settings > Print > Page Setup.

Safari

In order to maximize the space available on each sheet of paper, verify that the "Print Headers and Footers" checkbox is not selected in the browser's print menu. Under the "Paper Size" dropdown menu, select "Manage Custom Sizes." Configure the top, bottom, left, and right margins to be 0. Use this paper size profile to print without margins.

Chrome

No user actions are needed. Chrome provides the latest CSS3 specification for printing, which allows disabling print margins and header and footer content. This option is always used by the Viewer when printing in Chrome.

Opera

No user actions are needed. Opera provides the latest CSS3 specification for printing, which allows disabling print margins and header and footer content. This option is always used by the Viewer when printing in Opera.

FireFox

No user actions are needed. Firefox provides a native API to disable print margins and header and footer content. This option is always used by the Viewer when printing in Firefox.

Comments

You can select to have the Comments in the document print after each page, all at the end of the document or not print at all.

Redactions Reasons

You can select to have the Redaction Reasons in the document print after each page, all at the end of the document or not print at all.

Print Non-Standard Size Documents

Printing documents of non-standard paper sizes inside the Viewer can sometimes give you unwanted results such as cropping of pages or some empty spaces at the bottom of the printing area. Let's look at why such problems may occur and the printing workflow you should use inside the Viewer in order to eliminate those issues and achieve the best printing results. Printing a document in the Viewer is a two-step process which differs from a standard printing scenario that you might see in some desktop applications. This section discusses why this two-step process is required.

No matter what format your document is in currently, in order to display it in the browser it has to be converted into SVG format. The caveat of using SVG is that it's scalable and doesn't have a fixed width or height properties embedded into it (for example, like the PNG image). That's why in order to print it correctly we need to apply a specific size before sending it to the printing tool that is part of your browser. Let's look at how this can be done.

Step 1: Forcing a specific print size

1. Open a **document** of choice inside the Viewer.
2. Click **Print** and the Print dialog displays:
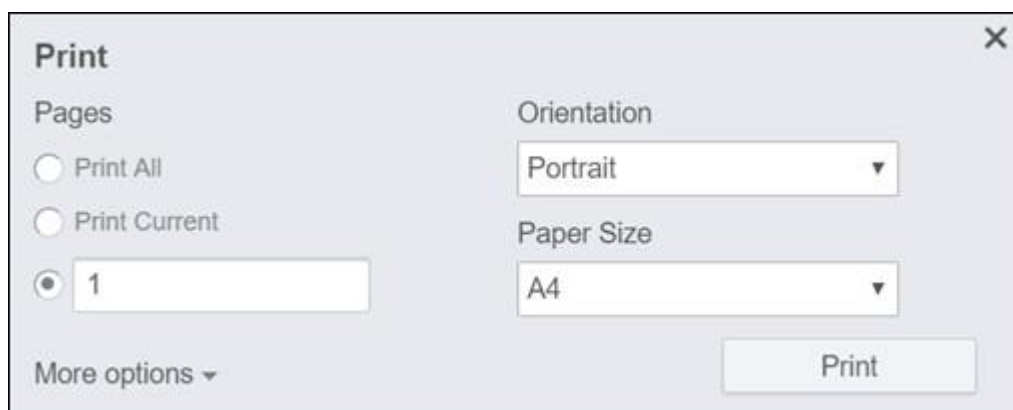
3. Select the **printing options** that you need. The first page of the document will print in portrait orientation using A4 paper size. (That's where we force the SVG content to be a specific printing size).

4. Click **Print** and this information is sent to the browser's printing middleware.

Step 2: Sync browser printing settings

The Print Preview dialog is a part of the browser and will differ depending on what browser you use. The following example uses Google Chrome.

1. Once all of the printing data has been loaded, a Print Preview dialog displays the default options:
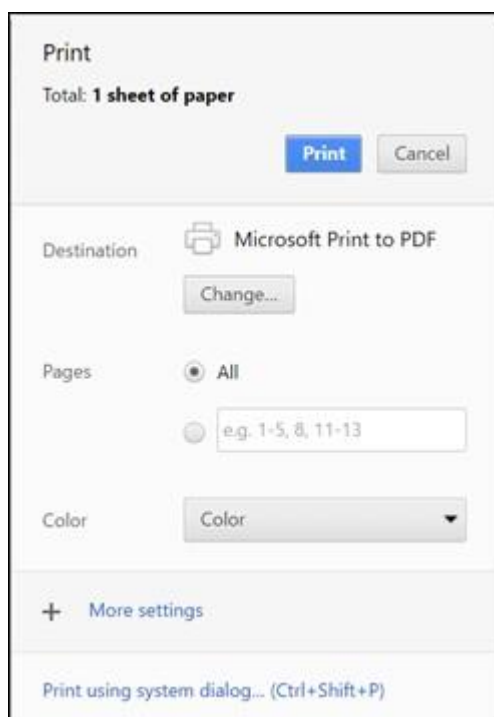
2. Since you already selected the print settings in Step 1 above, now you need to make sure that the browser print settings are the same. Click on **More Settings**.

3. The list of options is similar to the Viewer Print dialog. Select the **A4 paper size** from the drop-down:
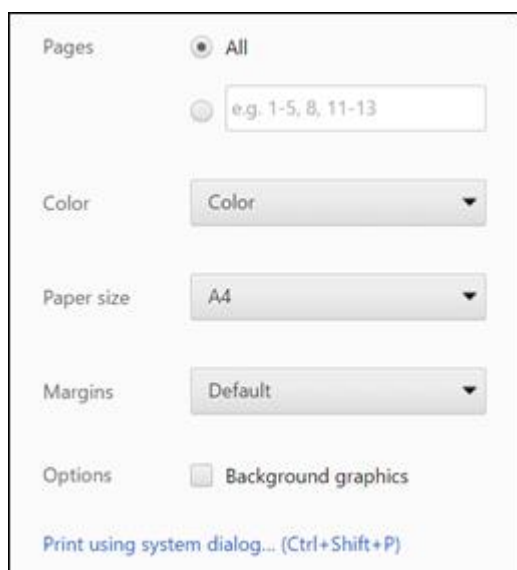
4. The non-standard paper sizes should now print correctly.

Download Documents

This section explains how to download a document, including how to include some or all annotations, redactions, and e-signatures, as well as how to use the Preview mode. You can choose to download your document as the "Original Document" or as a "PDF". Downloading the document as a PDF allows you to optionally "burn in" annotations, redactions, and e-signatures. See one of the following sections for details:

- Download the Original Document
- Download a PDF of the Document

Download the Original Document

The Download button is available under the View, Annotate, Redact, and E-Sign menus:
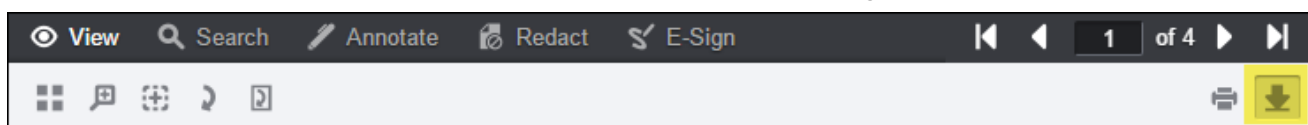
To download the original document:

1. Click the **Download** button. The Download as... properties panel displays:
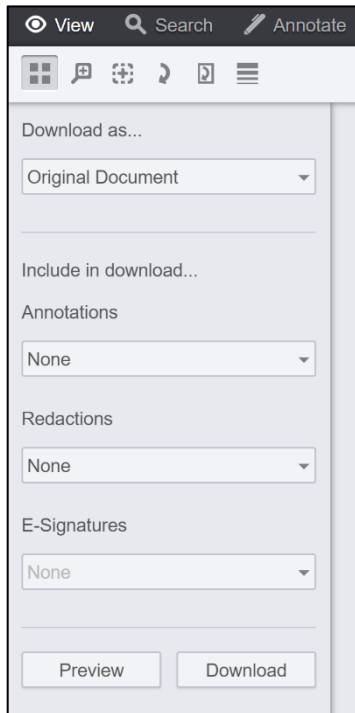
2. If you want to preview the document before downloading, click **Preview**. The document is displayed in Preview Mode, showing how it will appear when downloaded. To close Preview Mode, click **End Preview**.

3. Click **Download**, and the Complete dialog box displays:
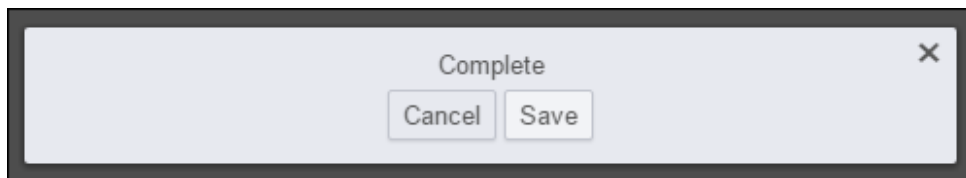
4. Click **Save** to copy the original document to your PC.

Download a PDF of the Document

Downloading the document as a PDF allows you to optionally "burn in" annotations, redactions, and e-signatures. The Download button is available under the View, Annotate, Redact, and E-Sign menus:
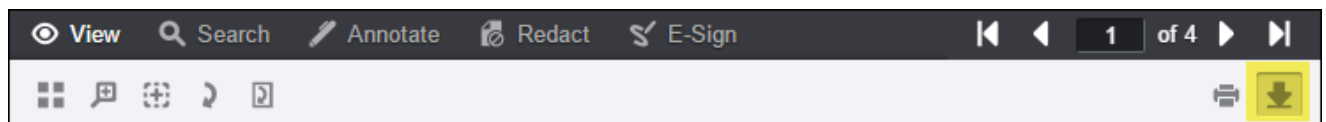
To download a PDF of the original document:

1. Click the **Download** button. The Download as... properties panel displays. Select **PDF** from the drop-down menu.
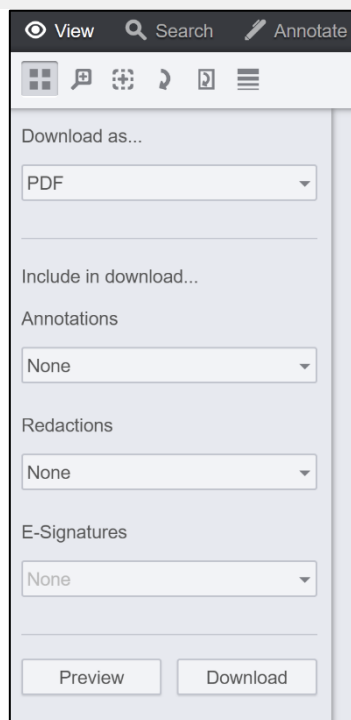
2. Now you can choose to include annotations, redactions, and e-signatures in your downloaded PDF. These options are only selectable if you have these elements in your original document.

3. If you have any annotations in the document, you can choose to include them in the downloaded PDF.
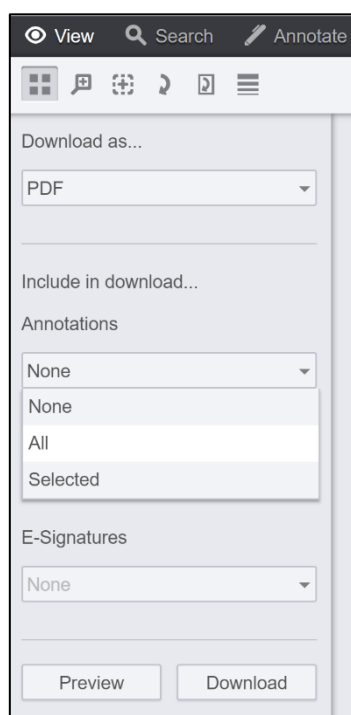
4. From the **Annotations** menu, choose **All** to include all of the annotations in the document, or choose **Selected** to include only those annotations that you've indicated that you want to **Include in Burned Document**. To select specific annotations to include in your downloaded PDF, click the annotation to select it, and the following options dialog appears:
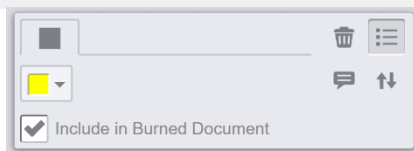
Check the **Include in Burned Document** checkbox to flag the annotation as "Selected" when downloading the PDF.

5. Similarly, if you have any Redactions in the document, you can choose how they will appear in the downloaded document.

6. From the **Redactions** menu, choose **Redact** to download the PDF with the redacted content removed and any redaction reasons visible. Choose **See Through** to download the PDF with the redactions displayed as semi-transparent, such that you can see the content underneath. When you choose "See Through" redactions, the redaction reasons are not displayed. For example, the following image shows a downloaded document with "See Through" redactions:

7. To include e-signatures in your downloaded PDF, from the **E-Signatures** menu, choose **All**.
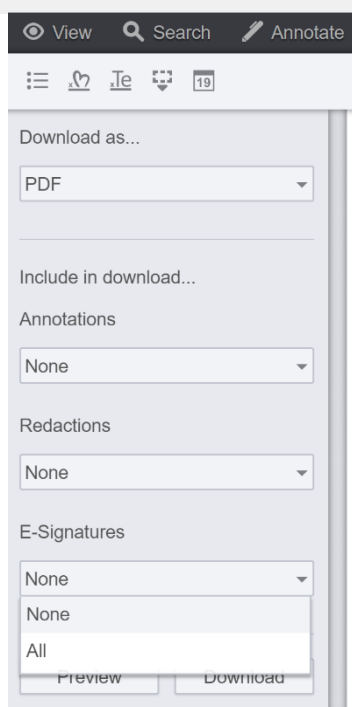
8. If you want to preview the document before downloading, click **Preview**. The document is displayed in Preview Mode, showing how it will appear when you download it. To close Preview Mode, click **End Preview**. Note that "See Through" redactions appear more opaque in Preview Mode than they do in the actual downloaded document.

9. Click **Download**, and the Complete dialog box displays:
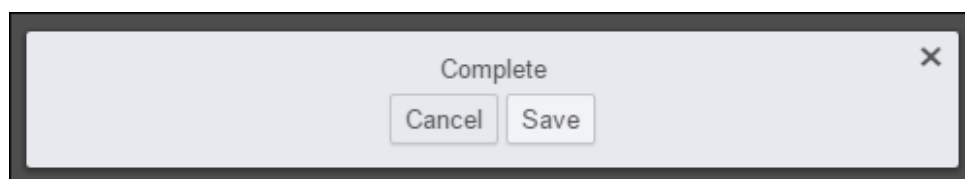
10. Click **Save** to download a PDF copy of the original document to your PC.

Reference

This section contains additional information on using the Viewer features:

- Tools
    - Viewer Main Screen Options
    - View Tab
    - Search Tab
    - Annotate Tab

- ○ Redact Tab
- ○ E-Sign Tab
- ○ Keyboard Shortcuts
- ○ Work with Sticky Mouse Tools

Tools

A listing of all the tools in the Viewer, what they can do, and their corresponding icon:

- Viewer Main Screen Options
- View Tab
- Search Tab
- Annotate Tab
- Redact Tab
- E-Sign Tab
- Keyboard Shortcuts
- Work with Sticky Mouse Tools

Viewer Main Screen Options

From the main screen in the Viewer, the following tabs are available for viewing and working with your documents:
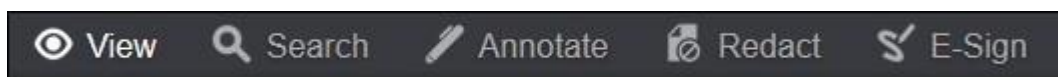
Click on the links below to read more about the features you can use on each of the tabs:

- View Tab
- Search Tab
- Annotate Tab
- Redact Tab
- E-Sign Tab

You can navigate through your document using the following features that are always available from each tab:

Document Navigation from the Top of the Screen

- First Page, Previous Page, Page 1 of "x", Next Page, and Last Page

For more details on these options, refer to View Tab > Document Navigation from the Top of the Screen.

Document Navigation from the Bottom of the Screen
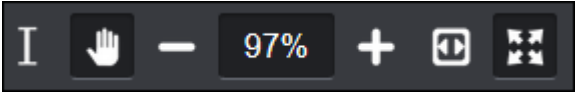
- Select Text, Pan Tool, Zoom Out, Zoom Percentage, Zoom In, Fit Content, and Full Screen

For more details on these options, refer to View Tab > Document Navigation from the Bottom of the Screen.

View Tab

The View Tab is the default tab that is displayed when you first open a document in the Viewer. Once you've loaded a document, it should look similar to this:
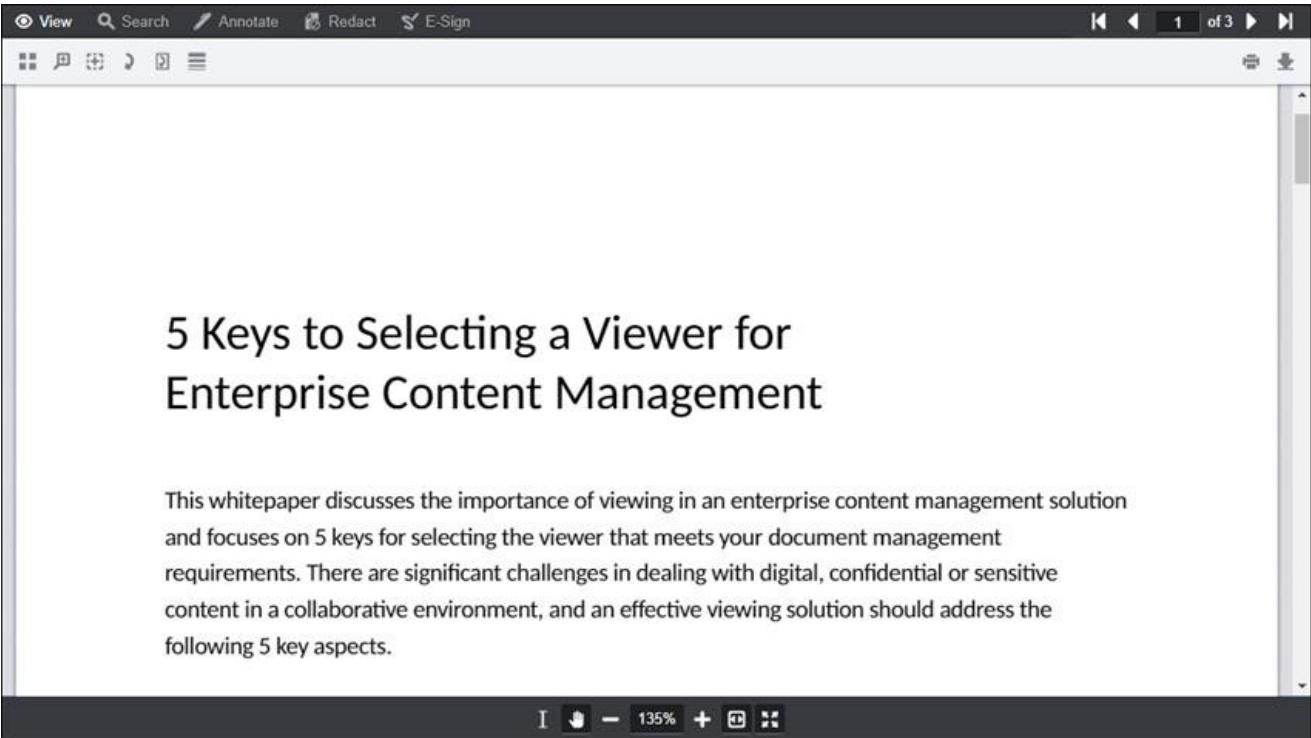
You will immediately note that you can scroll the page up and down via either the mouse or touch, just like any web page you've ever worked with. As you scroll through the document, each page becomes visible until you reach the last page in the document.

In addition to scrolling, there are several other Viewer adjustments that can be made for reading a document. These are located at the top and bottom of the browser window, and they allow you to easily adjust the page to your viewing needs. The following section provides you with more information on these features.

Document Navigation from the Top of the Screen
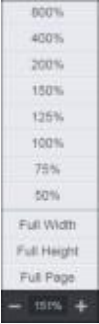
The following table shows the icons and their meanings:

	Thumbnails - The Thumbnail panel provides an overview of the document and your current position in it. Scrolling through the document is easy via this panel, and by simply clicking on a specific page you can load that page into the Viewer. Also, by adjusting the slider at the top of the thumbnail pane you can make the thumbnail images smaller or larger.

	Magnifier Tool - The Magnifier Tool allows you to dynamically zoom in on specific portions of the document, similar to using a magnifying glass. By clicking the mouse and then dragging it across the document, you can see an enlargement of the area directly under the mouse cursor.
	Rectangle Zoom - The Rectangle Zoom tool makes it easy to zoom in on an arbitrary rectangle in the document. Simply click and drag out the portion of the document you wish to zoom in on and the document zoom percentage will be adjusted accordingly. Unlike the Magnifier, the zoom level is set by the rectangle you draw, and once set in this way, will remain in effect until you modify it.
	Rotate Document - The Rotate Document tool makes it easy to rotate all the pages in the document by 90 degrees. To continue to rotate all the pages in the document by another 90 degrees, continue to press the Rotate Document button. **Note:** Using the Rotate Document tool only affects how the document is displayed in the Viewer and does not affect the original document data.
	Rotate Page - The Rotate Page tool allows you to rotate one page 90 degrees without rotating all the pages in the document. Simply scroll to the page you want to rotate and select the Rotate Page tool. To continue to rotate that page another 90 degrees, continue to press the Rotate Page button. **Note:** Using the Rotate Page tool only affects how the document is displayed in the Viewer and does not affect the original document data.
	Image Tools - The Image Tools feature allows you to enhance the document you are viewing for clarity. The slider provides three options: Sharpening, Brightness, and Line Width. Image Tools are available for viewing only; if you print or save the file after applying any of the Image Tools, the changes will not show in the printed or saved document.
	First Page - Select the First Page button to go to the very first page of the document.
	Previous Page - Select the Previous Page button to go back one page from your current location in the document.
	Next Page - Select the Next Page button to go forward one page from your current location in the document.
	Last Page - Select the Last Page button to go to the very last page of the document.
	Print - When you click on the Print button, a dialog is displayed that allows you to choose the Pages, Orientation, Paper Size, Auto Fit Margins, Annotations, Redactions, Comments and Redaction Reasons you would like to print. For more details on printing, refer to Printing Documents. **Note:** When attempting to print a document with a large number of pages (around 100 or more), the browser may run out of available memory and return an error, exit abruptly, or behave unexpectedly. If you are experiencing issues when trying to print, you can try printing the document in parts (separated by page ranges), or you can download the document from the Viewer and load it into a local application to print.
	Download - When you click on the Download button, a panel is displayed that allows you to choose the Original Document or PDF and if you want any Annotations, Redactions or E-Signatures to print as well. For more details on downloading documents and the options available, refer to Downloading Documents.

Document Navigation from the Bottom of the Screen

The navigation buttons at the bottom of the screen remain available through all pages of the document that you are viewing. The following table shows the icons and their meanings:

I	**Select Text** - The Select Text tool allows you to select text and perform actions such as copying it to the clipboard or highlighting it.
(hand icon)	**Pan Tool** - The hand-shaped tool is an important one for you to remember. It's called the Pan Tool, and when it's active (when the button appears indented) you are in "Pan mode" in the Viewer, which is the "base" state where you can select and work with items. If you're ever attempting to select an item and it draws an annotation instead, it's because this tool isn't currently selected. Many times this mode will be selected automatically for you. For example, the default behavior after drawing an annotation using one of the annotation tools is to return immediately to Pan mode so the newly created annotation can be manipulated as desired.
−	**Zoom Out** - The Zoom Out tool allows you to reduce the document size in the viewing area so you can easily see the borders of the document.
800% 400% 200% 150% 125% 100% 75% 50% Full Width Full Height Full Page − 151% +	**Viewing Options** (Percentage, Full Width, Full Height, Full Page) - The Viewing Options field displays your current zoom level (in this example, the area that displays 151%). Click the Viewing Options field to open a menu for additional viewing options.
+	**Zoom In** - The Zoom In tool allows you to enlarge the document in the viewing area so it is easier to read.
(fit content icon)	**Fit Content** - The Fit Content tool allows you to quickly expand the document to fit the width of the viewing area, with minimal borders on each side of the document.
(full screen icon)	**Full Screen** - The Full Screen tool allows you to expand the document to fit the width of the entire Viewer, with no visible borders on each side of the document.

Working with Large Files

Note that if you open, scroll-through or use set page number for a very large file, you may see the spinning circle (highlighted in yellow below) displayed in the middle of the Viewer while the document loads:

Search Tab

The Viewer contains powerful search features which allow you to look for various types of text within text-enabled documents such as Word documents and PDF files. In addition to searching within the text of your document, you can now perform a powerful set of document review tasks, using expanded Search features including a proximity search. A proximity search can be performed using the ~n syntax, where "n" is how many words can be between the first and second search terms and still return a result. With support for annotations search, you can search in comments, text annotations, redaction reasons, as well as see all of the annotations created in your document. Annotations can be navigated to by viewing annotation search results in the review panel or by navigating to each annotation in the document.

Example of the Search tab in the Viewer:
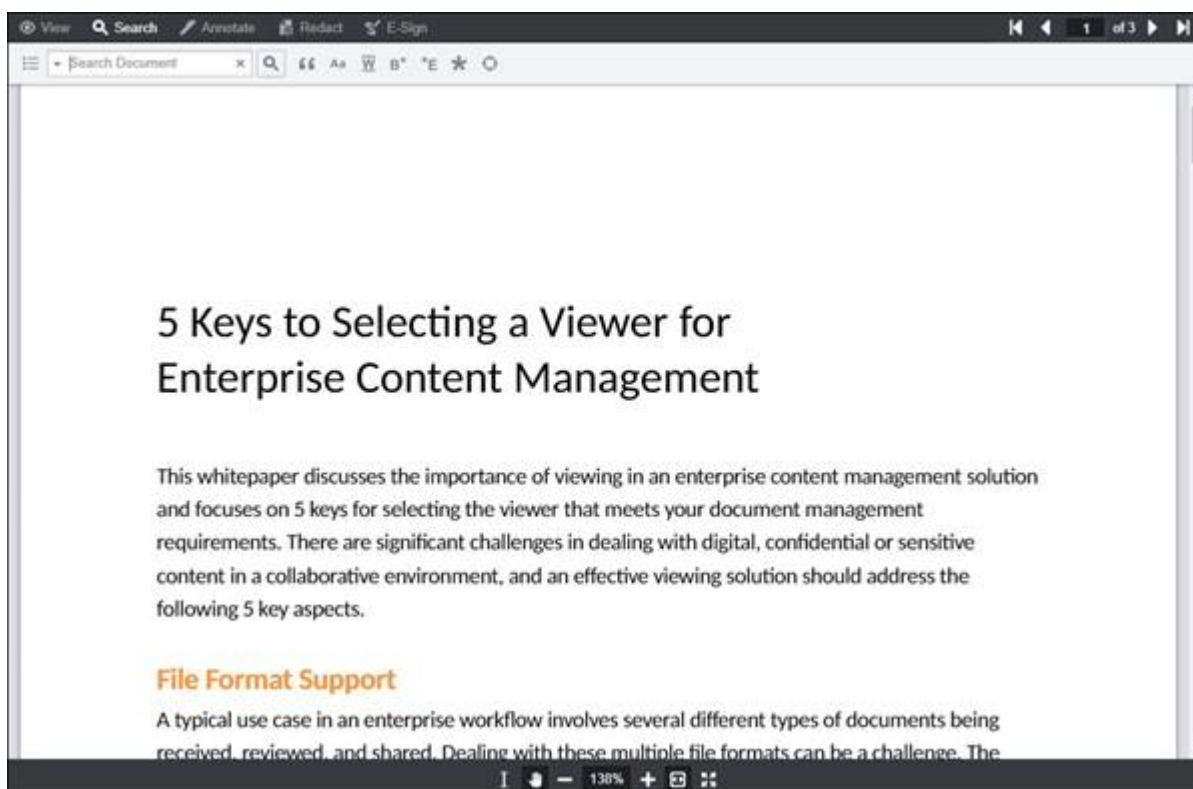
This section contains the following information:

Text Search Features

Within the Search feature, there are multiple ways to search a document:

Search Document Text Box

Search by entering text in the **Search Document** text box:
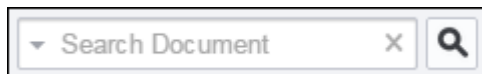
Search Icons

Narrow your search by selecting the **Search** icons:

Search Patterns

Search using the **Search Patterns** drop-down list:
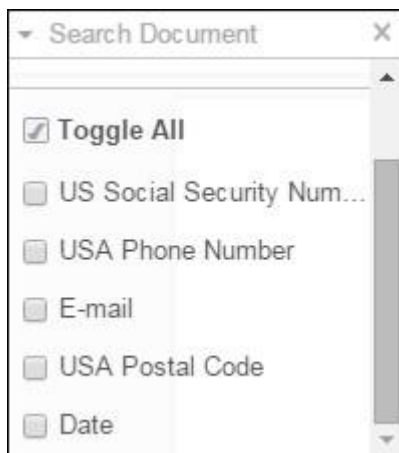
Search Filter

Search by using the advanced **Search Filter**:
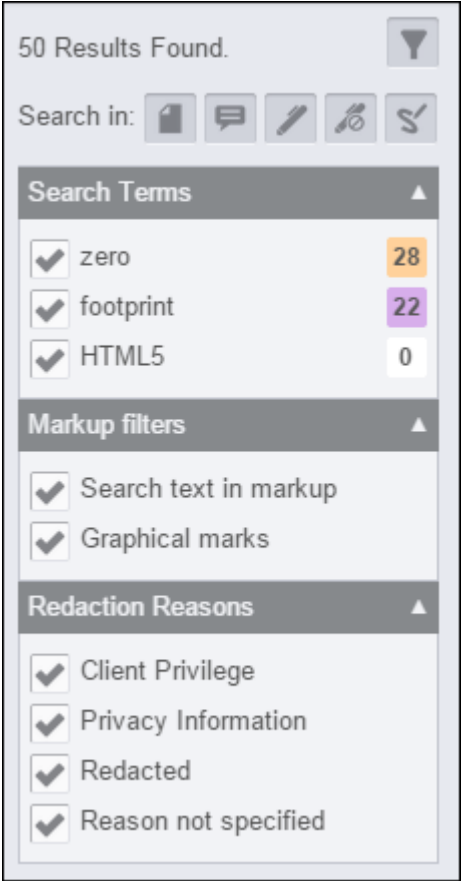
Search Icons

The Search icon bar:

You can search using the following criteria:

	Match Exact Word or Phrase – For example, you can search for an exact word "home" or a phrase "go home".
	Match Case - For example, you can search for "Home" or "home".
	Whole Word - For example, you can search for "home" and the search results will return "home" (but **will not** return "homeschooled").
	Begins With - For example, you can search for "con" and the search results will return "content" and "continued".
	Ends With - For example, you can search for "ent" and the search results will return "document" and "content".
	Use Wildcards - For example, you can use the asterisk (*) and search for "*@domain.com" and the search results will return all email addresses that have "@domain.com" in them (i.e., jane@domain.com). You can also use the question mark (?) and search for "ra?e" and the search results will return "rate", "rake", "race", etc.

When you select the 'Use Wildcards' icon, it automatically disables the following icons: 'Whole Word', 'Begins With' and 'Ends With'.

Search Filters & Document Review Features

Search Terms

The search filter allows you to easily search any of the following in the document:

	Searches for text within the document that matches the specified search criteria.
	Searches for **text within comments** that contain the specified search criteria.

Searches within **annotations** in the document. If selected, the annotation results returned will depend on the Markup filters selected, as shown below:

Markup filters ▲

☐ Search text in markup
☐ Graphical marks
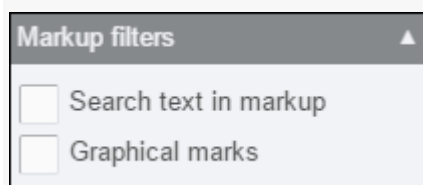
Search text in markup: When the annotation filter is enabled, any text contained within the text annotation (and/or selected text within a highlight or strikethrough annotation), that matches the search criteria you enter, will be highlighted. The annotation will appear in the search results panel.

Graphical marks: When the annotation filter is enabled and Graphical marks is selected, all annotations including graphical marks (lines, arrows, freehand, etc.) will be returned in the search results. This is a convenient way to quickly review all the annotations in your document.

The annotation button must be selected for the Markup filters to return any content.

Searches all **redactions** in the document. The redactions filter's results are independent of the search terms entered, because redacted content is not searched. However, by selecting the redactions filter, you can see and navigate to all redactions in the document. You can also filter Redaction Reasons by looking for redactions with specific reasons, or no reason at all. Redaction Reasons are configurable. See Using Redaction Reasons for more information.

Redaction Reasons ▲

✔ Client Privilege
✔ Privacy Information
✔ Redacted
✔ Reason not specified
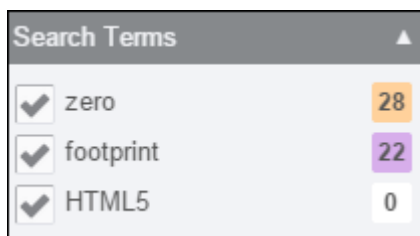
Finds all **signatures** in the document. This is independent of search criteria. The search does not inspect the content of the signature, but simply allows you to quickly find and navigate to

the 'non-burned-in' signatures in the document.

Search Terms Count

The Search Terms pane displays an aggregated list of search results, sorted by most to least hits found. In the following example, "zero" appears 28 times in the document:

Search Terms	▲
✔ zero	28
✔ footprint	22
✔ HTML5	0

If multiple search terms are selected, search hits can be further toggled in the results list.

Annotate Tab

Annotate Tab

The Annotate tab contains components that allow you to annotate a document. Note that annotations can be burned into the document, but they do not remove any of the underlying text content.
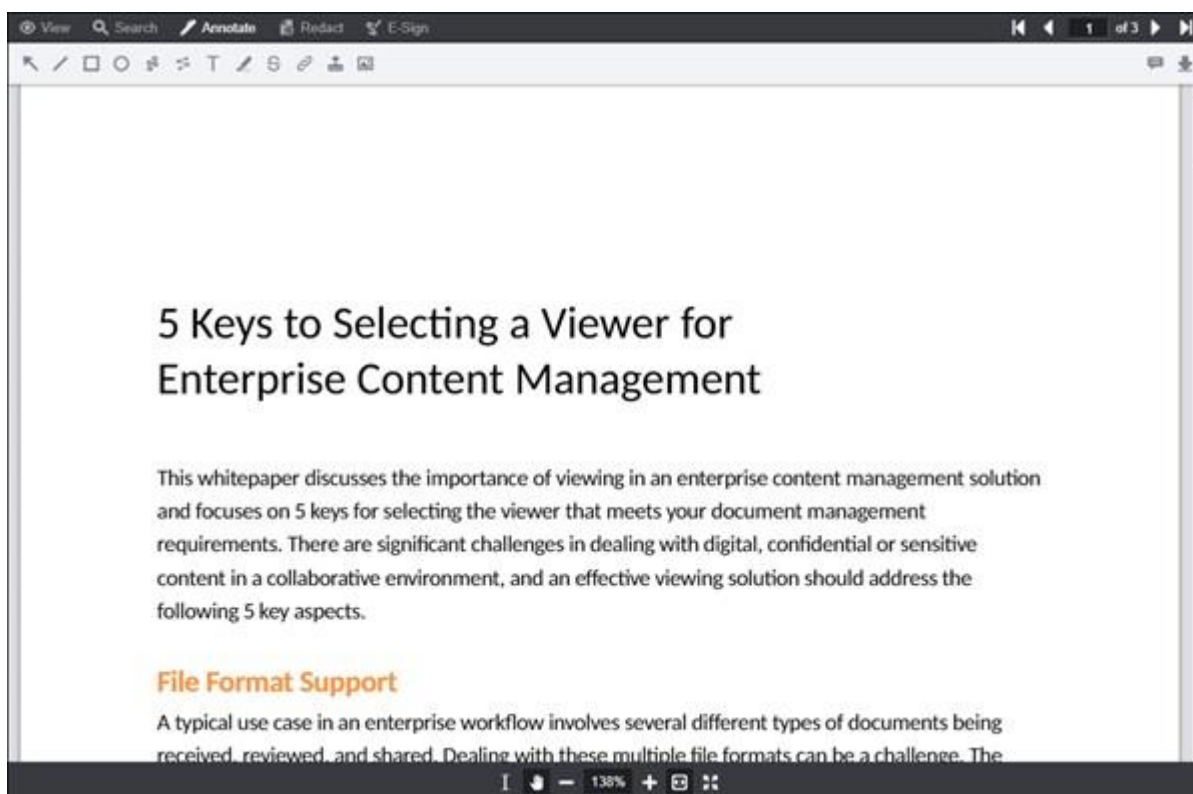
The following image shows the Annotate tab within the Viewer:
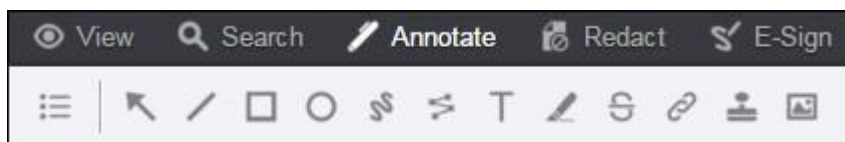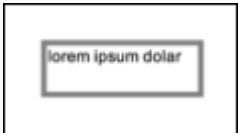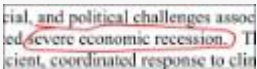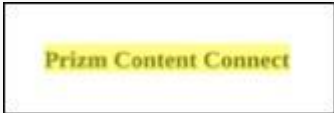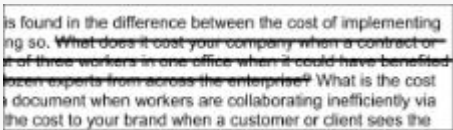
📑 You can easily modify your hyperlink and highlight annotations by using either touch or mouse.

The Annotate tab contains tools that allow users to annotate a document. Below is a description of the annotation toolbar:

Button Name	Description & Example
Annotation Layers	Use to view annotation layers:
Image Stamp Annotation	Use to select image stamp annotations:
Arrow Annotation	Use to draw arrow annotations:
Line Annotation	Use to draw line annotations:
Rectangle Annotations	Use to draw rectangle or square annotations:
Ellipse Annotation	Use to draw ellipse or circular annotations:
Text Annotation	Use to write text annotations:

	lorem ipsum dolar
Freehand Annotation	Use to draw freehand annotations:
Stamp Annotation	Use to draw stamp annotations:
Highlight Annotation	Use to highlight text on the document:
Strikethrough Annotation	Use to strikethrough text on the document:
Text Hyperlink Annotation	Use to create a hyperlink on the document:
Polyline Annotation	Use to draw Polyline annotations:
Edit Annotation Button	Use to select and alter the properties of annotations that have been generated or loaded in the Viewer.
Select Text Button	Use to select text in the document.
Pan Button	Use to pan around the document.
Save Annotations	Use to save the annotations for later use.

Button	
Load Annotations Button	Use to load previously saved annotations.

Redact Tab

Redact Tab

The Redact tab contains components that allow you to redact a term or whole pages in a document. Note that redactions can be burned into the document and they will remove the underlying text content. You also have the ability to search for a term and redact the search results - refer to the Searching Documents > Redact Search Results topic for more information.
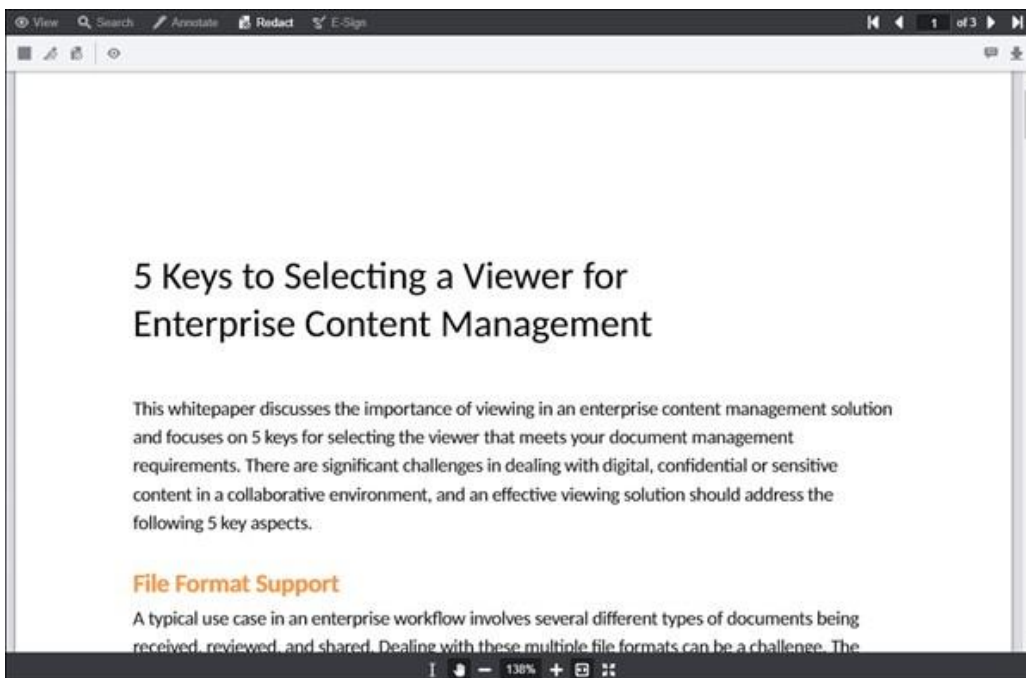
The following image shows the Redact tab within the Viewer:
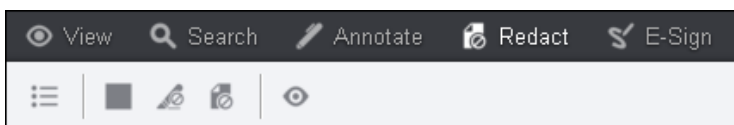
📝 You can easily modify your text selection redaction by using either touch or mouse.

📝 You can hover over a redaction and see the content behind the redaction prior to burning it in. To review all the redacted content at once, click on the Redaction View Mode button on the toolbar.

The Redact tab contains tools that allow users to redact a document. Below is a description of the redact toolbar:

Button Name	Description & Example
Annotation	Use to view annotation layers:

Layers	
Filled Rectangle Redaction	Use to draw solid, rectangle redactions: Comments Panel - choose fill color, line color, line width, text color:
Text Selection Redaction	Use to select and redact blocks of text using a text selection tool. After text selection, the highlight is converted to rectangle redactions. If multiple lines of text are selected, a rectangle redaction will be created for each line of selected text: Comments panel - choose the redaction reason:
Redact Full	Use to redact the current page, all pages or a range of pages. Select and apply the redaction reason:

Pages

You can delete a full page redaction by clicking on the full page redaction and selecting Delete from the immediate action menu:

Redaction View Mode	Use to see all redacted content: You can print and review redacted text in a document by selecting the 'Review Redacted Text' checkbox on the Print dialog box. The Print button is available on the View menu.
Select Text Button	Use to select text in the document.
Pan Button	Use to pan around the document.
Save Redactions Button	Use to save the redactions for later use.
Load Redactions Button	Use to load previously saved redactions.

E-Sign Tab

This topic contains the following information:

- Creating Signatures
- Adding a Signature to a Document

The E-Sign tab contains components that allow you to electronically sign a document.
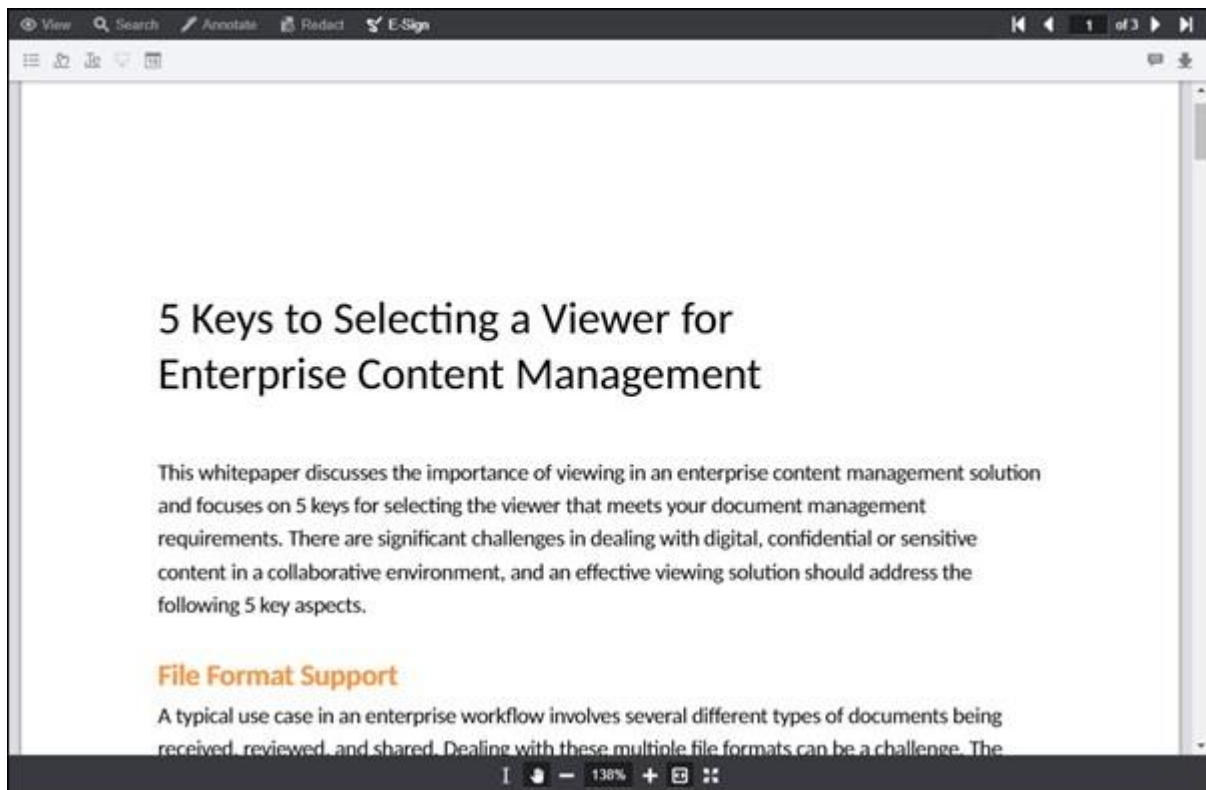
The E-Sign tab displays the Manage E-Signatures, Create Freehand Signature, Create Text Signature, Place E-Signature, and Place Date icons:
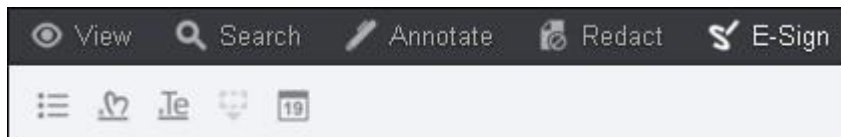
Hover over the icons for tooltips.

Creating Signatures

You can create the following E-Signatures:

- **Freehand** - draw your signature with your mouse
- **Text** - type your signature in a text box
- **Date** - select the date icon to apply the current date to your document

The following example shows the E-Signatures displayed in the Viewer:
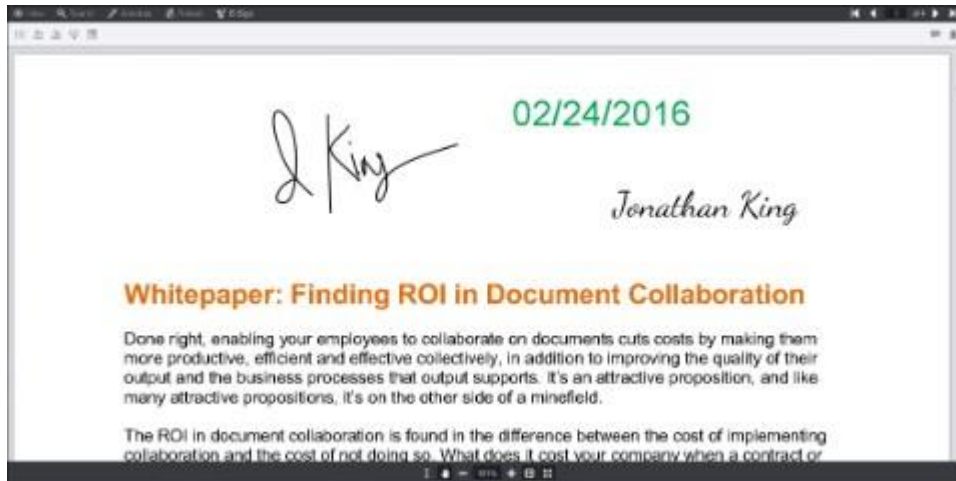
The following section covers how to create freehand and text signatures.

To create a Freehand signature:

1. Click on the **Create Freehand Signature** icon. A dialog box displays:
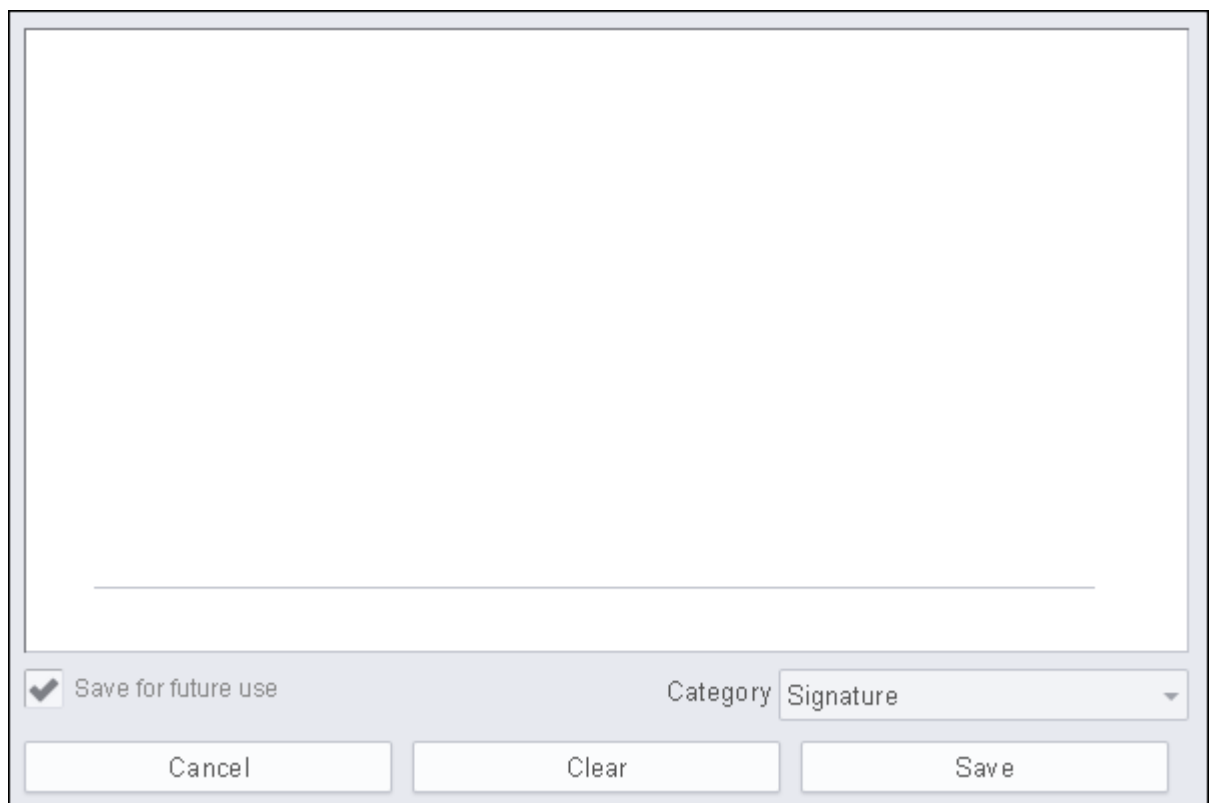
2. Using your mouse, start to draw your signature in the box:
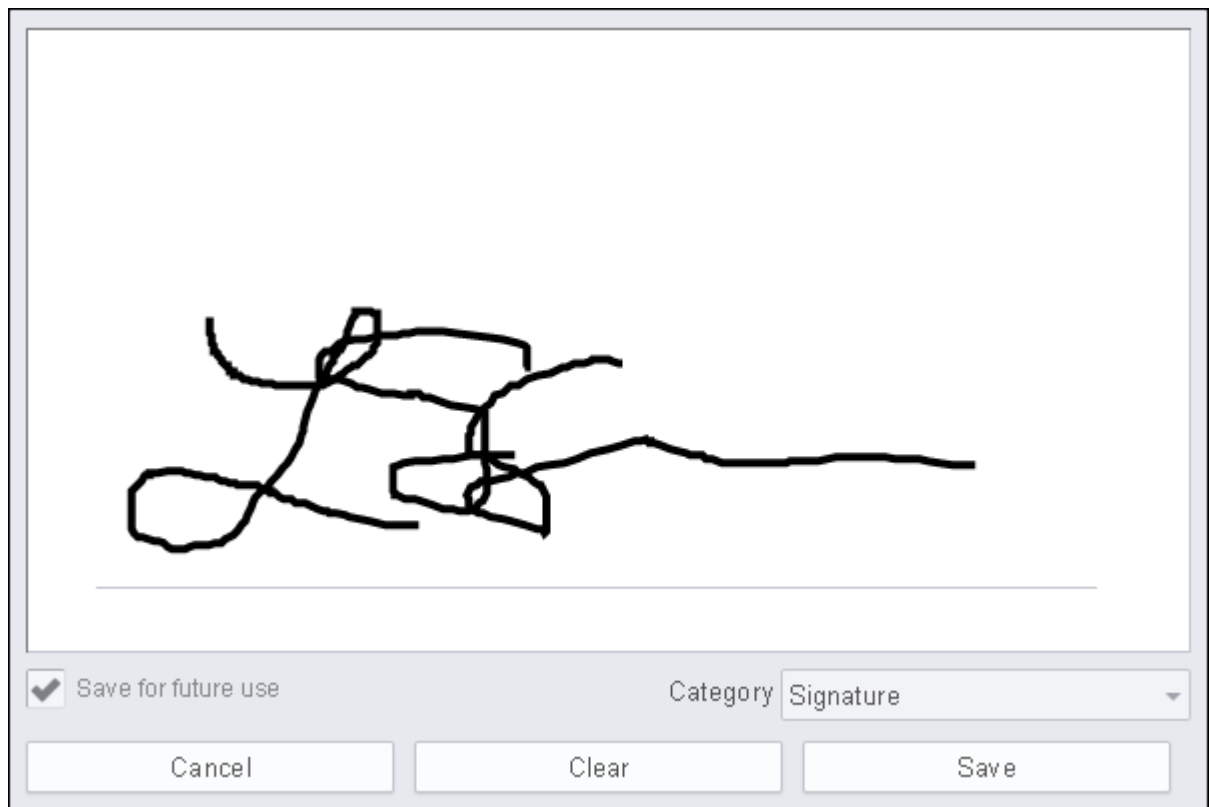
3. Select the **Category**: Signature, Initials or Title and then click **Save**.

To create a Text signature:

1. Click on the **Create Text Signature** icon. A dialog box displays:
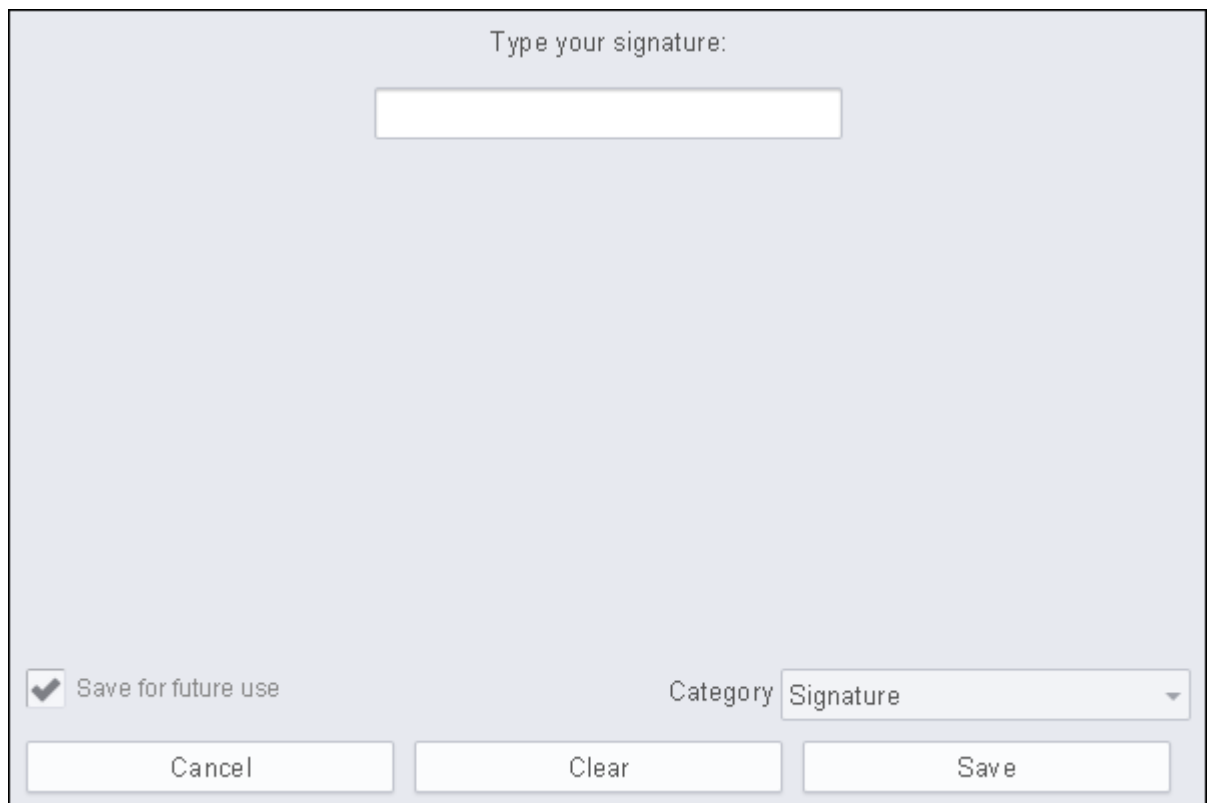
2. In the **Type Your Signature** box, enter your signature. Choose one of the pre-filled signatures with the font you prefer:

3. Select the **Category**: Signature, Initials or Title and then click **Save**.

To download a signature for your own record:

1. Click on the **Manage E-Signatures** icon. A dialog box displays:
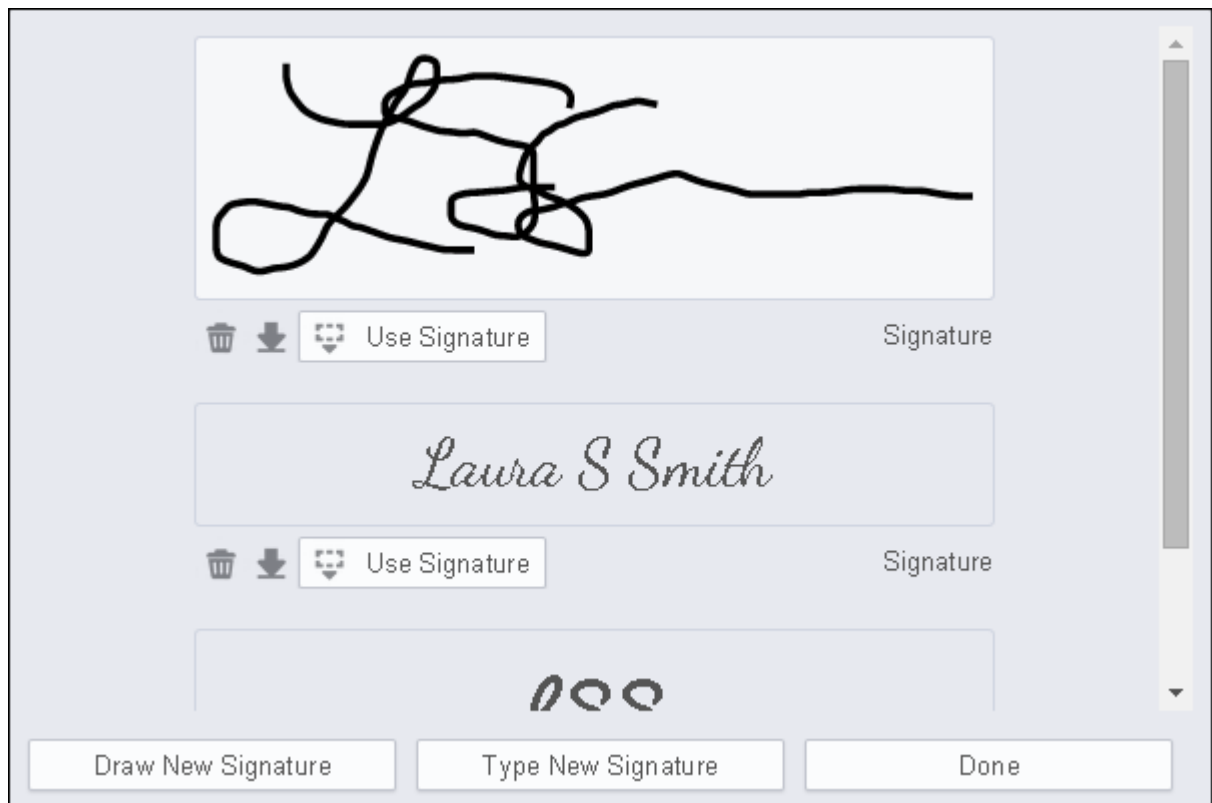
2. Click on the **Download Signature** button.
3. A signature.json file is downloaded to your computer. Click **Done**.

Adding a Signature to a Document

To add a signature to a document:

1. Click on the **Manage E-Signatures** icon. A dialog box displays:

2. Click on **Use Signature**. A floating toolbar displays in the Viewer:
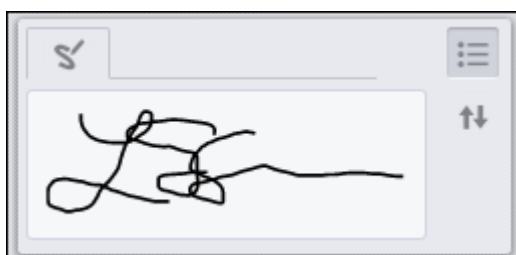
3. Click anywhere on the document where you want to place your signature. You can resize the signature using the yellow guide markers:
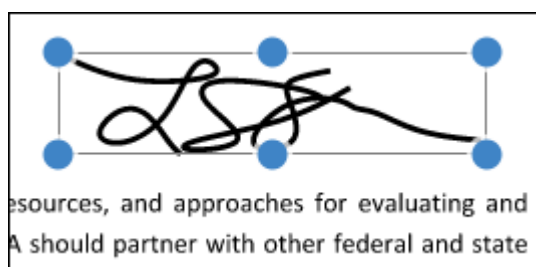
> If you have more than one signature on the document, click on the signature and the yellow guide markers appear so you can see which signature is active.

4. If you want to change the color, size, layer order of the signature or add a comment, you can select the attributes from the icons in the floating toolbar:
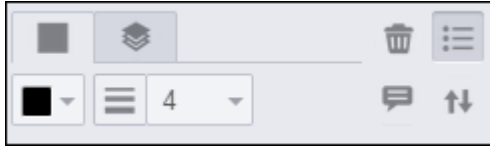
> 📑 When in Horizontal Layout Mode, comments are not supported in the Viewer.

If you want to delete the signature, click on the **Trash can** icon.

5. To save the signature, click the **Save** icon. The **Save As** field displays on the left-hand side of the Viewer:
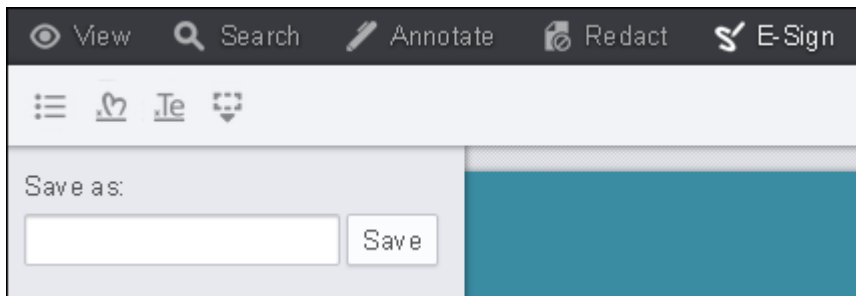
6. Enter a name for the signature and click **Save**.

Keyboard Shortcuts

The following keyboard shortcuts are supported in the Viewer:

Viewer Shortcuts

Key	Action
Page Up	Previous Page
Page Down	Next Page
Ctrl + G	Go to page - The cursor moves to the page number to edit (in the upper right corner of the Viewer), the page number is highlighted, you enter the new page number and press Enter.
Arrow Keys	Move viewport - The Arrow Keys are the same as using the Scroll Bars.
+	Zoom In
-	Zoom Out
Del	Delete the currently selected annotation(s)/redactions(s).

Dialog Box Shortcuts

Key	Action

Esc	Cancel / Close

Work with Sticky Mouse Tools

The mouse tools on the Annotation, Redaction and E-Signature menus can be selected to be used once or multiple times. The following section describes how to use this functionality in the Viewer.

To use the mouse tool once:

   1. Click on the **mouse tool** once and you can use the mouse tool one time:
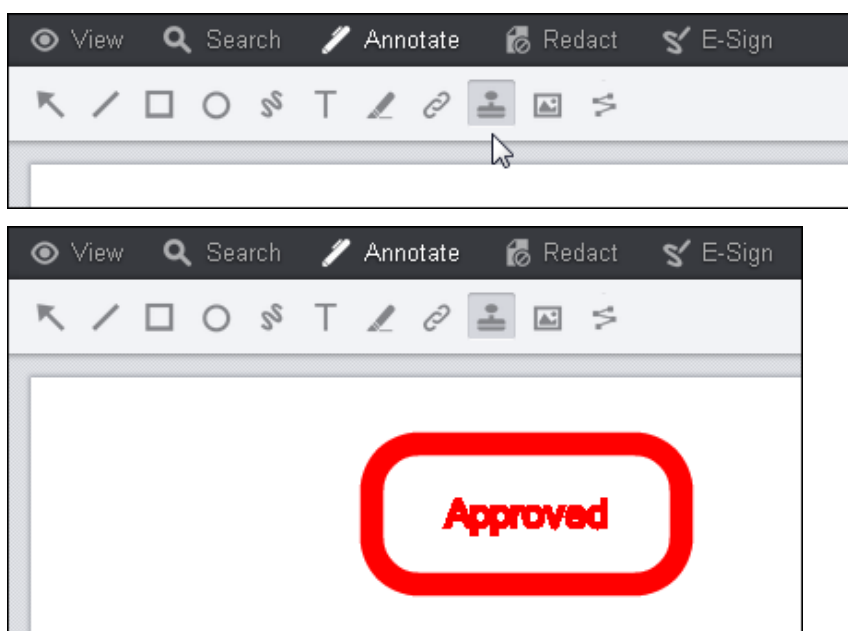
To use the mouse tool multiple times (known as "sticky mouse tool"):

   1. Click on the **mouse tool** twice and it will lock the mouse tool so that you can use it multiple times. Note that when the mouse tool is clicked on twice, the background turns gray and the mouse tool turns white:
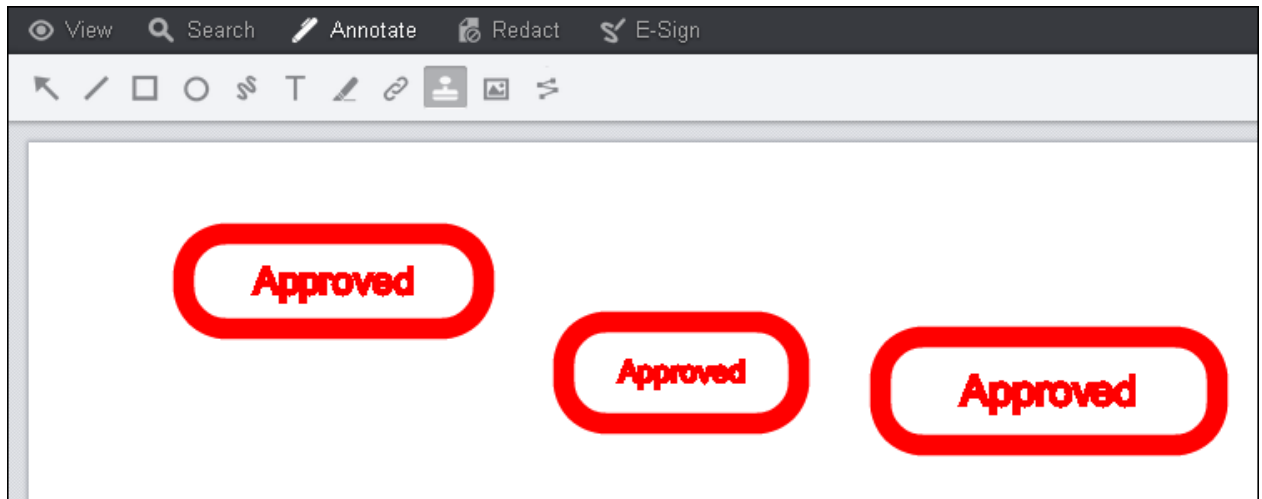
Further clicks on the mouse tool will toggle it from locked to unlocked.

> When you lock the mouse tool, it will disable touch-based scrolling.

2. To turn off the mouse tool completely, switch to a different tool. For example, click on the Hand Pan tool at the bottom of the Viewer:

> The default mouse tool is the Hand Pan tool.

E-Signature Module

This section contains the following information:

E-Signing Overview
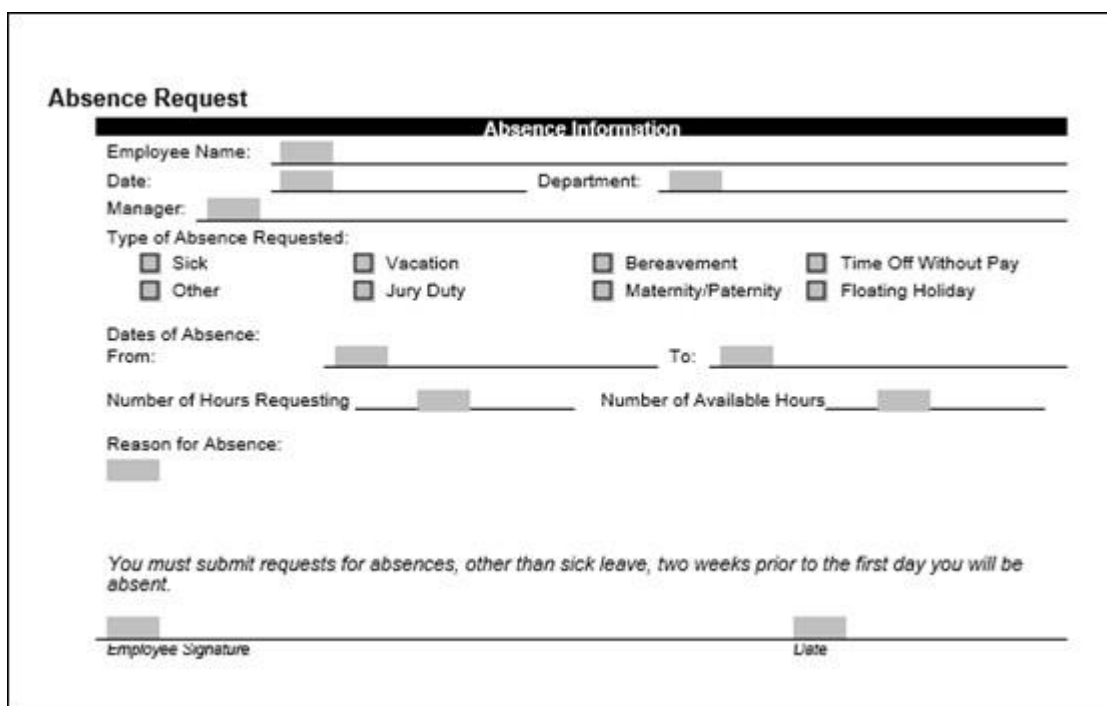
The E-Signature module opens up a set of PrizmDoc Viewer workflows based on forms stored in any of the many file formats supported by PrizmDoc Viewer. As with the Viewer, the E-Signature module works in your website to empower your customers as you see fit.

The E-Signature module will automatically detect form fields in a PDF or raster image document and convert them so that it's easier to fill out your templates. Depending on the quality of the forms in the document, there may be no manual effort required by the template designer.

The process starts with any document that you would like to "fill in" with some content. Note that this doesn't have to be an actual "form", it can really be any document that PrizmDoc Viewer can display.

If the document that you upload to the E-Signature module doesn't have any detectable form fields, a template designer then annotates it with the proper fields that will allow an end user to fill it out, burn in their signature, and create a finalized document that can then be forwarded as needed.

As an example, let's consider a blank Word document, a form for requesting time off:

Normally, an employee would fill this out in Word, print it, sign and date it, then submit to their manager. This is not a very friendly workflow, and it requires both a copy of Word (expensive) and printing a physical copy of the form (wasteful).

The goal of our eSigning module is to make this workflow entirely electronic, including signing and producing a final electronic document that can be forwarded for approval. In order to make this workflow a reality, you would need to do the following:

1. Set up a web-based workflow that incorporates our "Template Creator" module. This module allows creating a "template" out of a blank document by overlaying pre-defined form fields, such as Text, Date, or Signature fields. This template is then stored within the website for later use by employees wanting to fill out the form.
2. Set up a web-based workflow that incorporates our "Template Signer" module. This module allows opening a previously created template and then filling out the form's fields, including adding signatures and initials.

It's important to note that these two workflows are entirely independent. The people who might be template creators would normally be a very different set of people from those who need to fill out a form.

To illustrate the process, let's take the Absence Request form from above and load it in the template

creator module:

Note the tools available in the upper left of the screen. Currently we support Signatures, Initials, Text, Dates, and Checkboxes. So let's create the template using these field types, shown below:

Here you can see the form fields that have been overlaid on the original document. The right hand panel shows the list of all fields by name and type. Once this template is created and saved, it's now ready to be consumed and filled in by users. Below you can see how this looks in the default template signing module:

Here you can see the field layout that users will see. The fields with red stars are the required fields and the progress bar at the bottom of the screen illustrates how complete the required fields are in the form. Once all required fields have been completed, the "Download Signed Form" button will be enabled, allowing the user to download a PDF of the fully completed form as shown below:

Now that the form is complete, the download button will allow downloading the final burned document, shown below:

This is just a quick overview that should illustrate how useful this could be in your product or your business. The most powerful part of the whole system is that it exists in your web pages, under your full control.

Creators - Design a Template

This section contains information on how to design templates for end users:

- Tools Reference
- Set up a Basic Template
- Add Features to the Template
- Use the Form Field Detector
  - Form Field Detector Error Messages

Tools Reference

This section covers the following features:

- Example of a Template in the E-Signature Viewer
- Main Toolbar
- Adjusting a Field's Position
- Icons, Buttons & Fields
- Form Navigator

Example of a Template in the E-Signature Viewer

The following example shows a template displayed in the main E-Signature viewer:

Main Toolbar

The following example shows the Main Toolbar:

Pan

The following example shows the Pan icon:
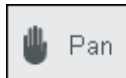
Use the Pan feature to move the document up or down as desired.

Signature

The following example shows the Signature icon:
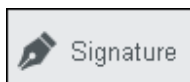
When you click on the Signature button, the following items are displayed:

- Required Button - select the button to require the end user to fill in the field
- Read-only Button - select the button to set the field to be read-only
- Field ID - this field is populated with a generic name by default
- Display Name - enter a name to easily recognize the field

Initials

The following example shows the Initials icon:

When you click on the Initials button, the following items are displayed:

- Required Button - select the button to require the end user to fill in the field

- Read-only Button - select the button to set the field to be read-only
- Field ID - this field is populated with a generic name by default
- Display Name - enter a name to easily recognize the field

Text Box

The following example shows the Tex Box icon:

When you click on the Text Box button, the following items are displayed:

- Required Button - select the checkbox to require the end user to fill in the field
- Read-only Button - select the button to set the field to be read-only
- Multiline Checkbox - select the checkbox to allow the end user to enter multiple lines of text in the text box (the Max Font Size drop-down will display when you select this checkbox so you can choose the maximum font size you want the field to auto size to)
- Field ID - this field is populated with a generic name by default
- Display Name - enter a name to easily recognize the field
- Max Font Size Drop-down - when multiline is selected, the Max Font Size drop-down is displayed so you can select the maximum font size you would like the field to auto size to
- Color Drop-down - click to select from a list of available colors
- Character Limit - enter a number to limit the number of characters an end user can enter

Date

The following example shows the Date icon:
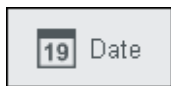
When you click on the Date button, the following items are displayed:

- Required Button - select the button to require the end user to fill in the field
- Read-only Button - select the button to set the field to be read-only
- Field ID - this field is populated with a generic name by default
- Display Name - enter a name to easily recognize the field
- Font Drop-down - click to select from a list of available fonts
- Color Drop-down - click to select from a list of available colors

Checkbox

The following example shows the Checkbox icon:
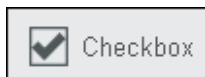
When you click on the Checkbox button, the following items are displayed:

- Required Button - select the button to require the end user to fill in the field
- Read-only Button - select the button to set the field to be read-only
- Field ID - this field is populated with a generic name by default
- Display Name - enter a name to easily recognize the field
- Checkbox Group - enter a name for a group of checkboxes

- Allow Multiple Selections - select the checkbox to allow the end user to select multiple checkboxes in a group

Settings

The following example shows the Settings icon:

1. To change the font or font color, click on **Settings** and the Global Template Settings dialog box displays:
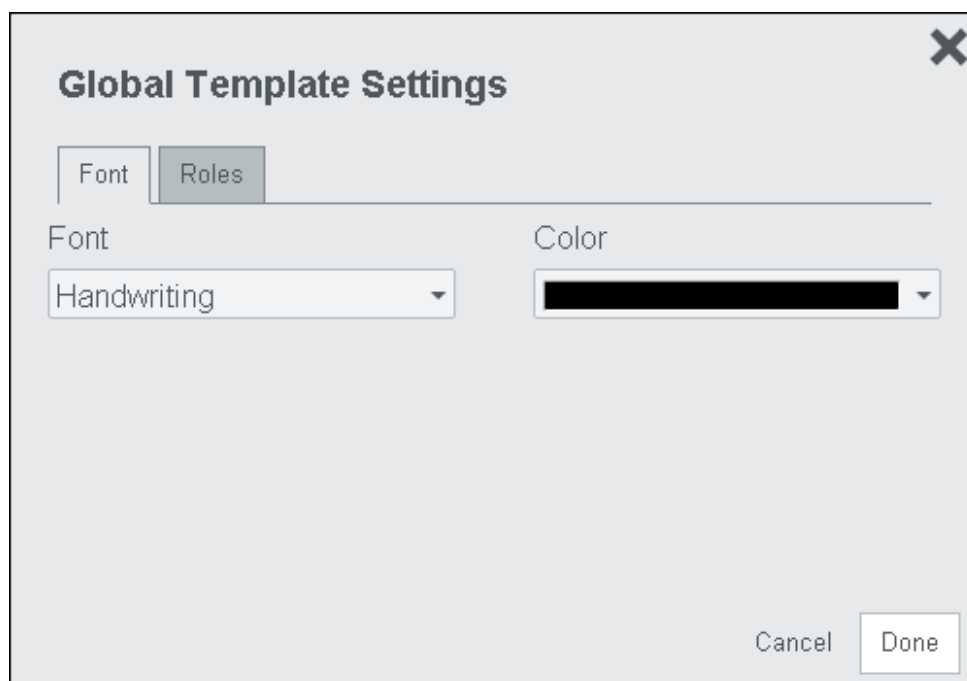
Font Tab

- Font Drop-down - click to select from a list of available fonts
- Color Drop-down - click to select from a list of available colors

Roles Tab

- Role Name - type in the role name
- Color - click to select from a list of available colors
- Roles - displays the roles that have been created (maximum, five roles)

> Note that when you select a font or color in the Global Template Settings dialog box, it is the default setting for the Text Box and Date fields that you create in the Template. You can override the font or font color on a per field basis as shown below.

Changing Settings in the Properties Panel

1. When you create a Text Box and view the Properties Panel associated with that Text Box, you will see "Use Global Setting" as the default setting:

2. If you want to change the default setting for this Text Box only, select a different **font** or **font color** from the drop-down list here in the Properties Panel.

Adjusting a Field's Position

Arrow Keys

You can move or 'nudge' the position of a field by using your keyboard's arrow keys. Click on the **field** you want to move, then select the **up**, **down**, **left** or **right arrow key** on the keyboard to move the field to the desired location on the form.

Group Properties Panel

1. You can align and match the size of multiple fields at one time by using the **Ctrl key** and clicking on the fields you want to align:

2. Then select **Match Size** and **Vertical Alignment** as shown in yellow highlight below:

> 🖅 You can align and match the size for the signature, initials, text box, and date fields.

Icons, Buttons & Fields

Unnamed Template Field

The following example shows the Unnamed Template Field:

- Unnamed Template Field - click to enter the name of the template you are designing

Save Button

The following example shows the Save Button / Drop-down:

- Save Drop-down - click to Save or Save a Copy of the template:
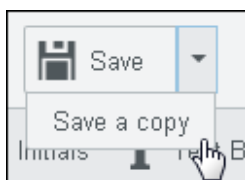
Zoom In / Zoom Out

The following example shows the Zoom In / Zoom Out Toolbar:

- Minus Sign - click to zoom out
- Percentage - displays the viewing percentage
- Plus Sign - click to zoom in

Page Navigation

The following example shows the Page Navigation Toolbar:

- First Page - click to go to the first page of the template
- Previous Page - click to go to the previous page
- Next Page - click to go to the next page
- Last Page - click to go to the last page of the template

Required Fields

The following example shows the red indicator for a required field:

Once you click on the required field, the indicator will disappear. When you click outside of the field, the red indicator will reappear.

Read-Only Fields

The following example shows the indicator for a read-only field:

Once you click on the read-only field, the indicator will disappear. When you click outside of the field, the red indicator will reappear.

Form Navigator

1. After you add some fields to the template, you will see them displayed in the Form Navigator to the right of the template:

2. You can sort the Form Field names so the proper tab order is created for signing. Click on the **arrows** (highlighted in blue below) to activate the sorting feature. Click on the **bars** (highlighted in yellow below) to drag the Form Field name up or down in the list:

After you have moved the fields as desired, click on the **arrows** again to de-activate the sorting feature.

3. You can easily modify the fields from this pane by clicking on the Display Name of the field. For example, click on **Signature of Examiner** to edit that field:

4. The Signature Pane displays and you can edit the contents of this pane as desired. The **Duplicate** icon, highlighted in yellow below, allows you to draw multiple signatures at a time. To delete a signature field in the template, click on the **Delete** button, highlighted in green below:

Properties Panel

The following example shows the Properties Panel for a Text Box (which displays when you click on an item in the

Form Navigator):

Note that the following items are available in the Properties Panel depending on the tool you selected on the Main toolbar (Signature, Initials, Text Box, Date, Checkbox):

- Required Button - select the button to require the end user to fill in the field
- Multiline Checkbox - select the checkbox to allow the end user to enter multiple lines of text in the text box (the Max Font Size drop-down will display when you select this checkbox so you can choose the maximum font size you want the field to auto size to)
- Read-only Button - select the button to set the field as read-only for the end user
- Field ID - this field is populated with a generic name by default
- Alignment - sets the horizontal text alignment for the selected field
- Display Name - enter a name to easily recognize the field
- Font Drop-down - the default is "Use Global Setting" or you can click to select from a list of available fonts
- Color Drop-down - the default is "Use Global Setting" or you can click to select from a list of available colors
- Max Font Size Drop-down - when Multiline is selected, the Max Font Size drop-down is displayed so you can select the maximum font size you would like the field to auto size to
- Character Limit - enter a number to limit the number of characters a user can enter

Set up a Basic Template

This topic contains the steps to set up a template:

Creating a New Template

1. From the splash screen, under Create a New Template, add a **file** by selecting **one of the following**:
   - Drop a File Here
   - Click to Select a File
2. For this example, choose **Click to Select a File**:
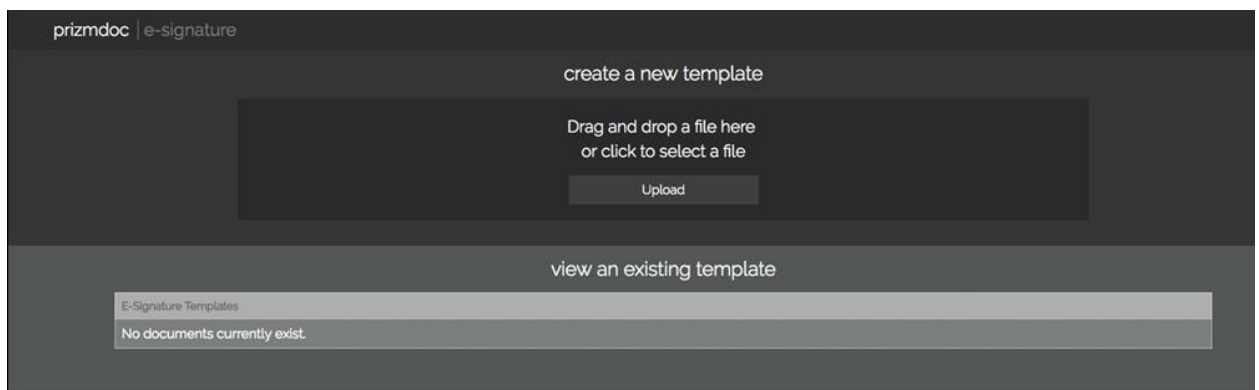
3. The Open dialog box displays. Browse to the file location, click on the **file** and click **Open**:
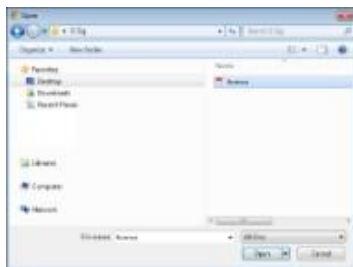
4. The template displays in the E-signing window:
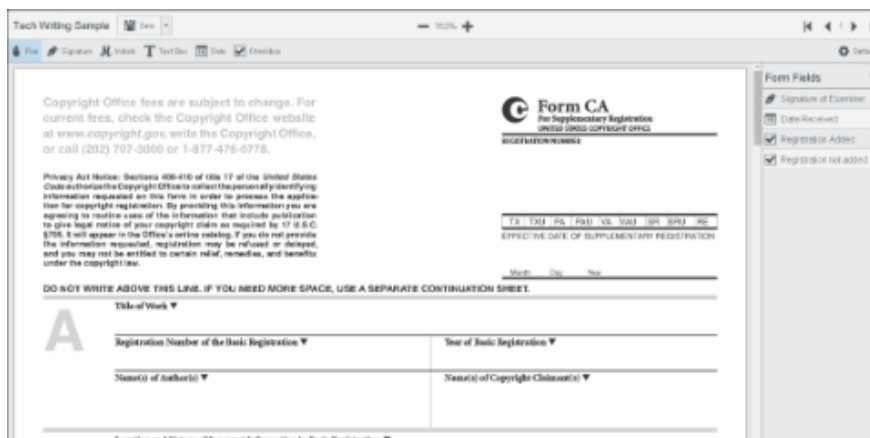
5. In the upper left corner, click in the **Unnamed Template** field. Type in a **name** for the template and click **Save**:
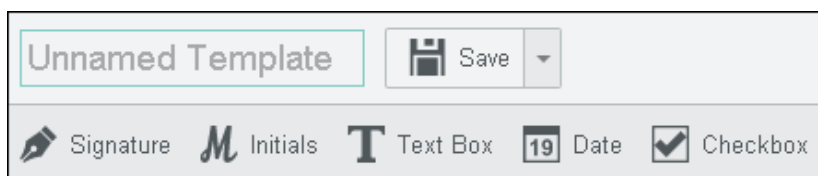
6. To make Global Settings for the template, click **Settings**:

7. The Global Template Settings dialog box displays:
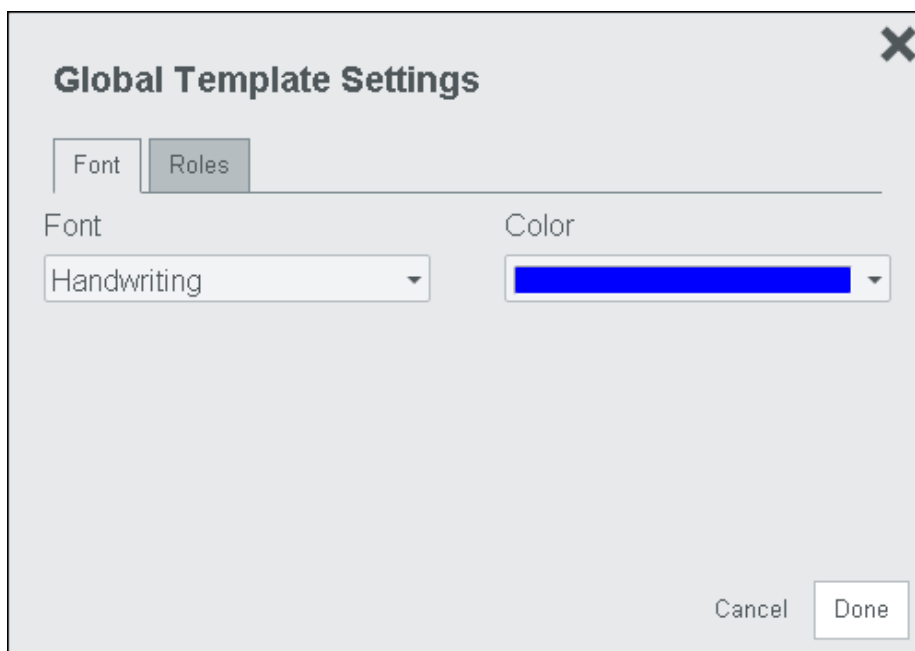
8. Select the **Font type** and/or **Color** as desired. If you want to create Roles for the template, refer to the section below, "Adding Roles".

> Note that when you select a font or color in the Global Template Settings dialog box, it is the default setting for the Text Box and Date fields that you create in the Template. You can override the font or color on a per field basis if desired.

9. Once you are finished making selections in the Global Template Settings dialog box, click **Done**.

Viewing Required Fields

Required fields can easily be seen by the red indicator in the upper right-hand corner:

Once you click on the required field, the indicator will disappear. When you click outside of the required field, the red indicator will reappear in the upper right-hand corner.

Viewing Read-only Fields

Read-only fields can be easily seen by the indicator in the upper right-hand corner:

Once you click on the read-only field, the indicator will disappear. When you click outside of the read-only field, the indicator will reappear in the upper right-hand corner.

Adjusting a Field's Horizontal Alignment

You can specify a text and signature field's horizontal alignment by selecting one of the following buttons:

Adjusting a Field's Position

Arrow Keys

You can move or 'nudge' the position of a field by using your keyboard's arrow keys. Click on the **field** you want to move, then select the **up**, **down**, **left** or **right arrow key** on the keyboard to move the field to the desired location on the form.

Group Properties Panel

1. You can align and match the size of multiple fields at one time by using the **Ctrl key** and clicking on the fields you want to align:

2. Then select **Match Size** and **Vertical Alignment** as shown in yellow highlight below:

📝 You can align and match the size for the signature, initials, text box, and date fields.

Sorting Fields

Use the following steps to sort fields that you have created:

1. After you add some fields to the template, you will see them displayed in the Form Navigator to the right of the template:

2. You can sort the Form Field names so the proper tab order is created for signing. Click on the **arrows** (highlighted in blue below) to activate the sorting feature. Click on the **bars** (highlighted in yellow below) to drag the Form Field name up or down in the list:

3. After you have moved the fields as desired, click on the **arrows** again to de-activate the sorting feature.

Editing, Duplicating or Deleting a Field

1. You can easily modify the fields from the Form Navigator by clicking on the **Display Name** of the field. For

example, click on **Signature of Examiner** to edit that field:

2. The Properties Panel displays and you can edit the contents of this pane as desired.

   - To draw multiple signatures at a time, click on the **Duplicate** icon.
   - To delete a signature field on the form, click on the **Delete** button.

3. When you are finished, click on the **Return** button to go back to the Form Navigator:

Saving the Template

Use the following steps to save the template:

Save the Template

1. To save the template you created, click **Save** on the toolbar at the top of the Viewer window:

2. A check mark appears on the Save button to indicate your changes have been saved.

Save a Copy of the Template

1. To save a copy of the template you created with a different name, click the **Save drop-down** and select **Save a copy**:
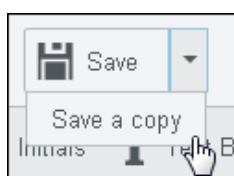
2. A copy of the template is created. Click in the **Name Field** and enter the new template name:
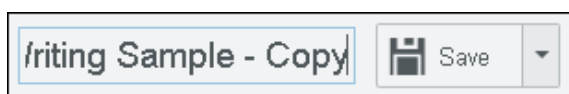
3. Click **Save** to save the new template.

> 📋 If you exit a template without saving your changes, a message appears, "Confirm Navigation - Warning: You have unsaved changes, save before continuing. Are you sure you want to leave this page?" Click 'Leave this Page' to exit without saving changes or click 'Stay on this Page' to save your changes.

Deleting the Template

Use the following steps to delete a template:

1. From the splash screen, under the heading 'View an Existing Template', you will see the list of available templates:
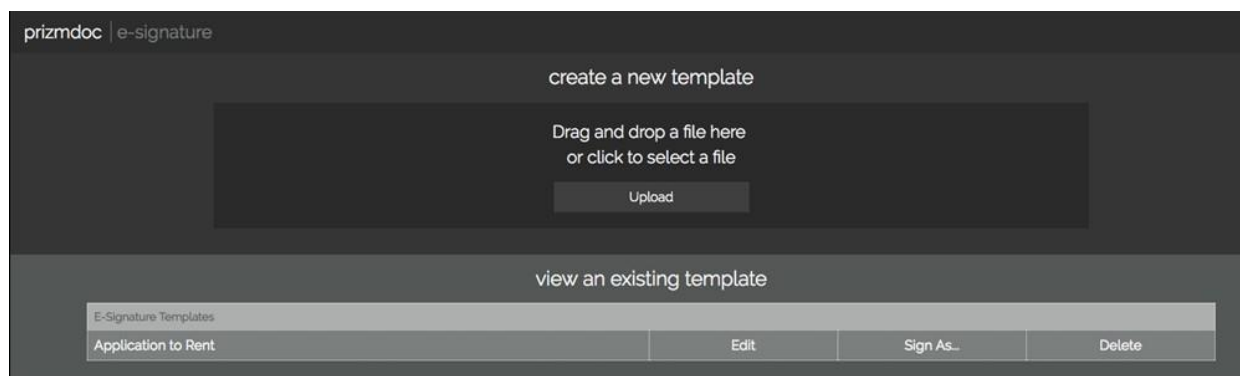
2. Scroll to the template you want to delete.
3. Click **Delete** and a message appears, "Are you sure you want to delete this template?"

The page at pcc-client-svr12r2.jpg.com:8006 says:

Are you sure you want to delete this template?
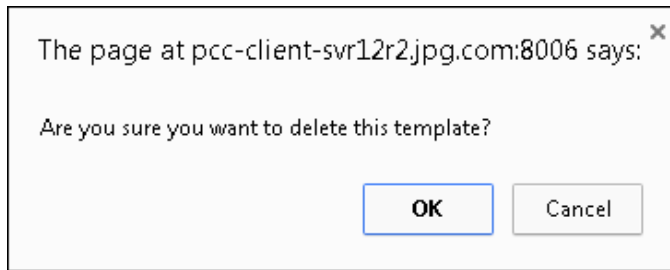
OK   Cancel

4. Select **OK** to delete the template (or Cancel to keep the template).

Add Features to the Template

This topic contains the steps to design a template using all of the tools on the menu:

- Adding a Signature
- Adding Initials
- Adding a Text Box
- Adding a Date
- Adding a Checkbox
- Adding Roles
- Assigning Roles to Fields
- Assigning an Input Mask to a Text Box

Adding a Signature

Use the following steps to add a signature to the template:

1. To add a signature, click on the **Signature** button.
2. Scroll to the location on the template you want to add the signature and draw a **box**.
3. The Properties Panel opens to the right of the template and displays the available options for the field.
4. If the signature is read-only, click the **Read-only** button.
5. If the signature is mandatory, click the **Required** button.
6. Enter a **Display Name** to easily refer to the form field. In this example, type in **Signature for Examiner**.
7. Choose the **Alignment**, click the **Left**, **Center**, or **Right** button.
8. If you want to add additional signature fields to the template, click on the **Duplicate** icon and draw the signature fields as desired.

> You can adjust a field's position in several ways; see the section below, "Adjusting a Field's Position" for details.

Adding Initials
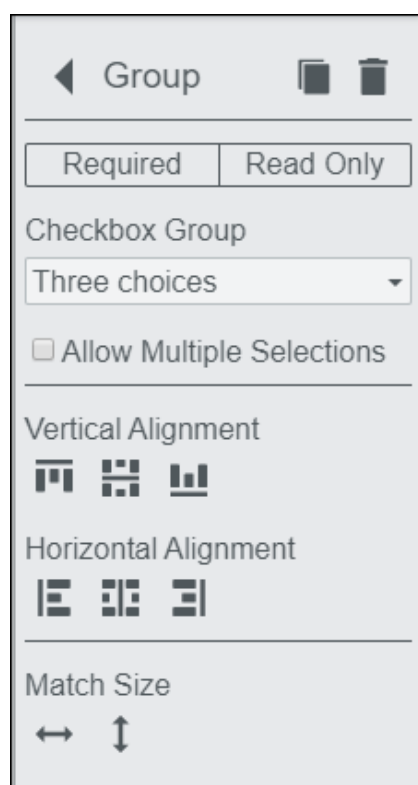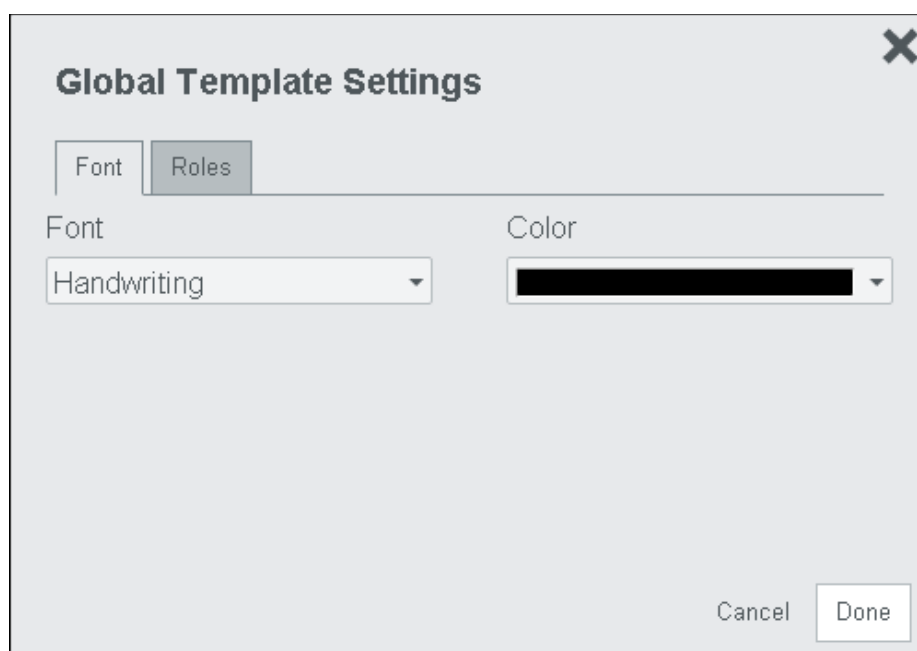
Use the following steps to add initials to the template:

1. To add initials, click on the **Initials** button. Scroll to the location on the template you want to add the initials and draw a **box**.
2. The Properties Panel opens to the right of the template and displays the available options for the field.
3. If the initials are read-only, click the **Read-only** button.
4. If the initials are mandatory, click the **Required** button.
5. Enter a **Display Name** to easily refer to the form field. In this example, type in **Initials of Reviewer**.
6. Choose the **Alignment**, click the **Left**, **Center**, or **Right** button.
7. If you want to add additional initials fields to the template, click on the **Duplicate** icon and draw the initials fields as desired.

> 📋 You can adjust a field's position in several ways; see the section below, "Adjusting a Field's Position" for details.

Adding a Text Box
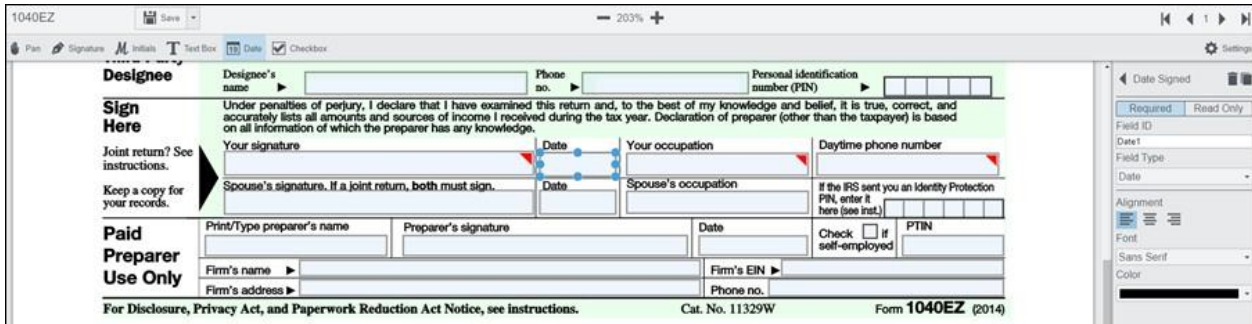
Use the following steps to add a text box to the template:

1. To add a text box, click on the **Text Box** button. Scroll to the location on the template you want to add the text box and draw a **box**.
2. The Properties Panel opens to the right of the template and displays the available options for the field.
3. If the text box is read-only, click the **Read-only** button.
4. If the text box is mandatory, click the **Required** button.
5. If you want to allow the end user to enter multiple lines of text in the Text Box, click on the **Multiline** checkbox.
6. Once you select the Multiline checkbox, the Alignment, Font, Color, Max Font Size, and Character limit properties display on the Properties Panel. Select the **properties** that you want for the Multiline Text Box.
7. Enter a **Display Name** to easily refer to the form field. In this example, type in **First Name &Initials**.
8. If you want to add additional text box fields to the template, click on the **Duplicate** icon and draw the text box fields as desired.

📝 You can adjust a field's position in several ways; see the section below, "Adjusting a Field's Position" for details.

Adding a Date

Use the following steps to add a date to the template:
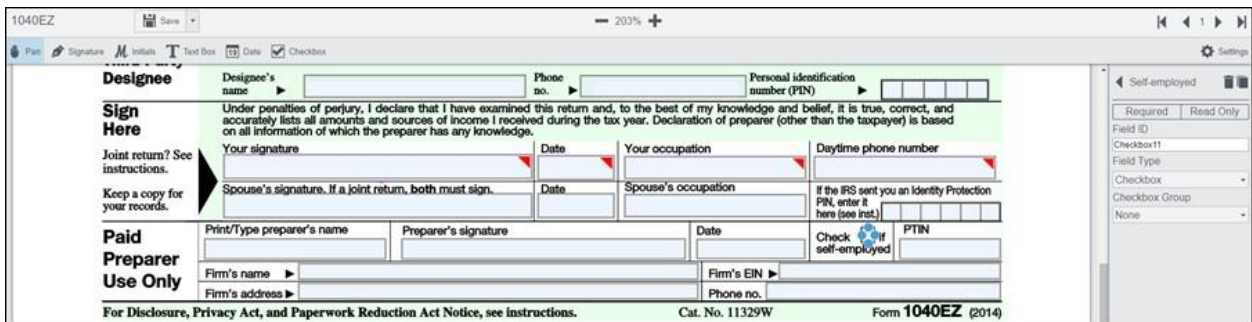
1. To add a date box, click on the **Date** button. Scroll to the location on the template you want to add the date and draw a **box**.
2. The Properties Panel opens to the right of the template and displays the available options for the field.
3. If the date box is read-only, click the **Read-only** button.
4. If the date box is mandatory, click the **Required** button.
5. Enter a **Display Name** to easily refer to the form field. In this example, type in **Date Signed**.
6. For a date box, you can choose the **Alignment**, **Font**, and **Color**.
7. If you want to add additional date fields to the template, click on the **Duplicate** icon and draw the date fields as desired.
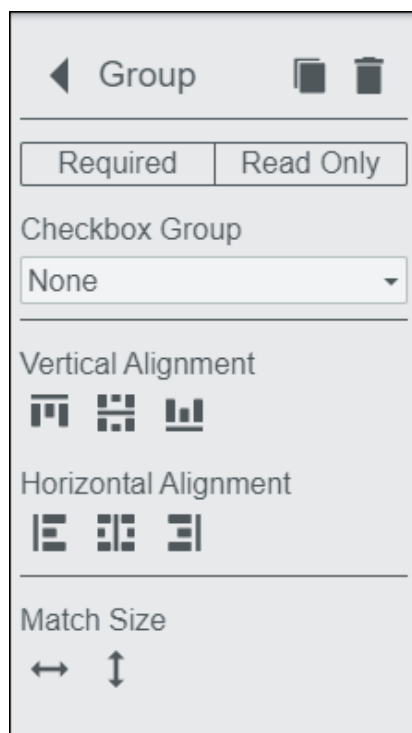
📝 You can adjust a field's position in several ways; see the section below, "Adjusting a Field's Position" for details.

Adding a Checkbox

Use the following steps to add a checkbox to the template:

1. To add a checkbox, click on the **Checkbox** button. Scroll to the location on the template you want to add the checkbox and draw a **checkbox**.
2. The Properties Panel opens to the right of the template and displays the available options for the field.
3. If the checkbox is read-only, click the **Read-only** button.
4. If the checkbox is mandatory, click the **Required** button. If not, leave it unchecked.
5. Enter a **Display Name** to easily refer to the form field. In this example, type in **Self-employed**.
6. If you want to add additional checkbox fields to the template, click on the **Duplicate** icon and draw the checkbox fields as desired.
7. To create a group of checkboxes, follow **step 5** above and create the desired amount of checkboxes that you want the user to choose from.
8. Press the **Ctrl key** and click on (multi-select) the checkboxes that you want to put into a group. The Group properties panel displays:

9. From the Group properties panel, you can select the **Required** button (if desired), the **Read-only** button (if desired), enter a **Checkbox Group** name, select the **alignment** and **match the size** of all the checkboxes in the group.

10. Under **Checkbox Group**, select **New Checkbox Group** so that the user can check multiple checkboxes within that group. Enter a name for the group (in this example, type **Three Choices**) and click the **checkmark** to save the group name.

11. If you want the user to be able to make multiple sections, check the **Allow Multiple Selections** checkbox.

> 📝 You can adjust a field's position in several ways; see the section below, "Adjusting a Field's Position" for details.

Adding Roles

You can add Roles to a template so that multiple people can review, edit, sign and save a document. For example, roles could be created for an Employee, a Manager and a Director. Adding roles to a template helps clarify the document review process in an organization by only allowing role-based interaction within the document.
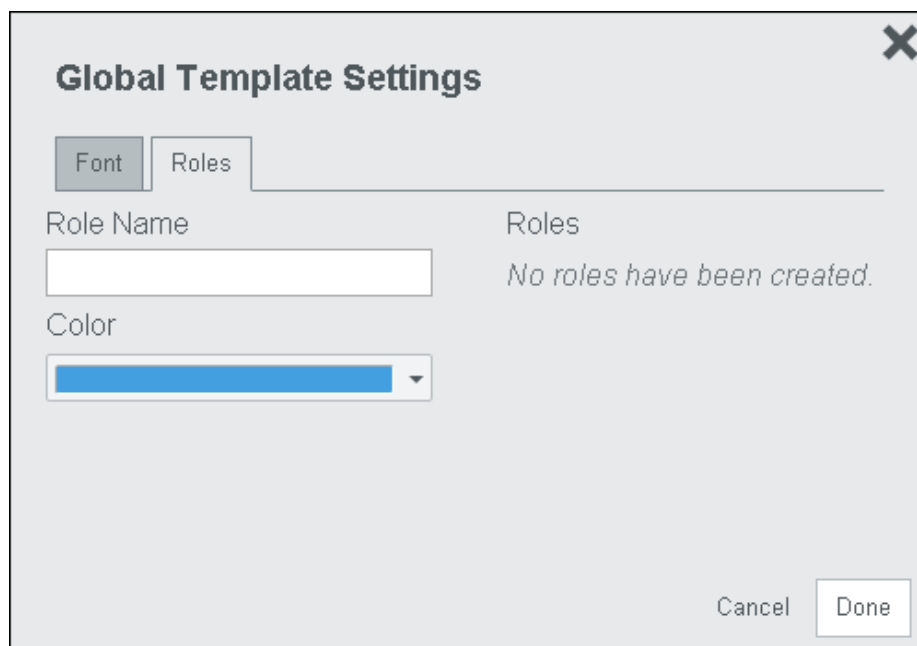
Use the following steps to add roles to the template:

1. To add roles to a template, click on **Settings** and the Global Template Settings dialog is displayed:
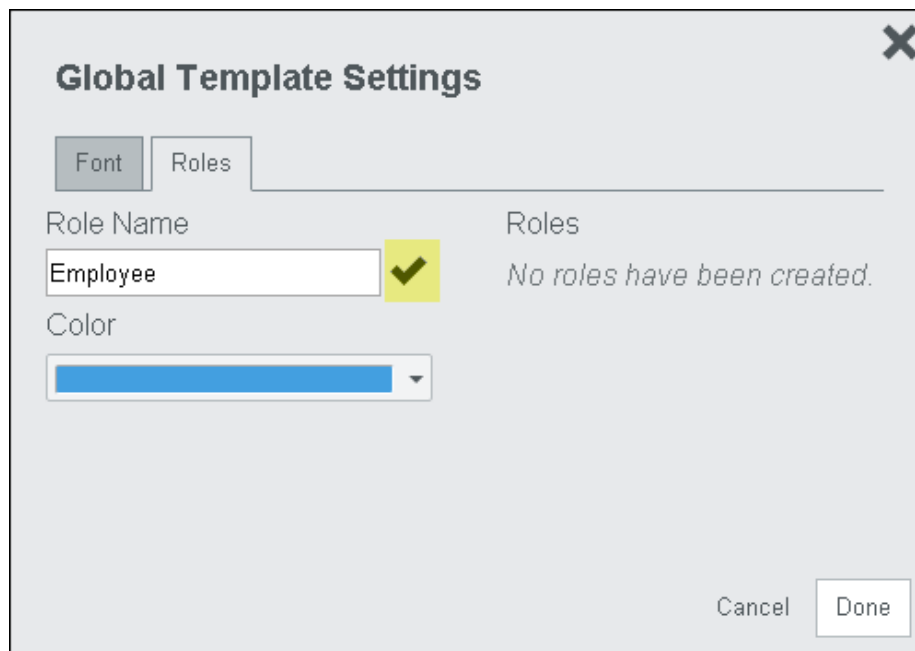
2. Click the **Roles** tab and the roles settings are displayed:

3. In the **Role Name** field, type in **Employee** and click the **Checkmark** (or press Enter):
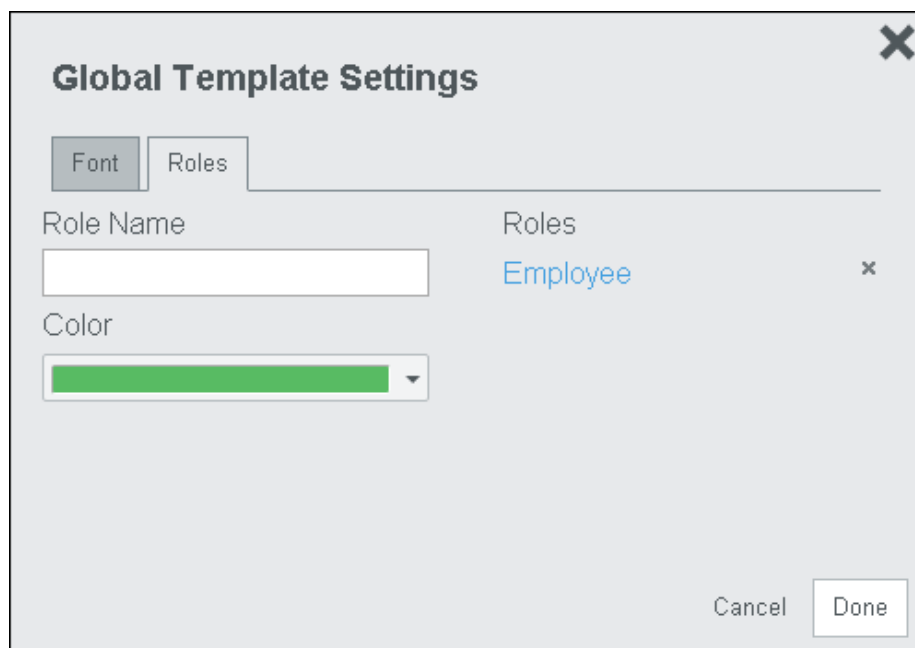
The new Role titled "Employee" is displayed under Roles in blue:
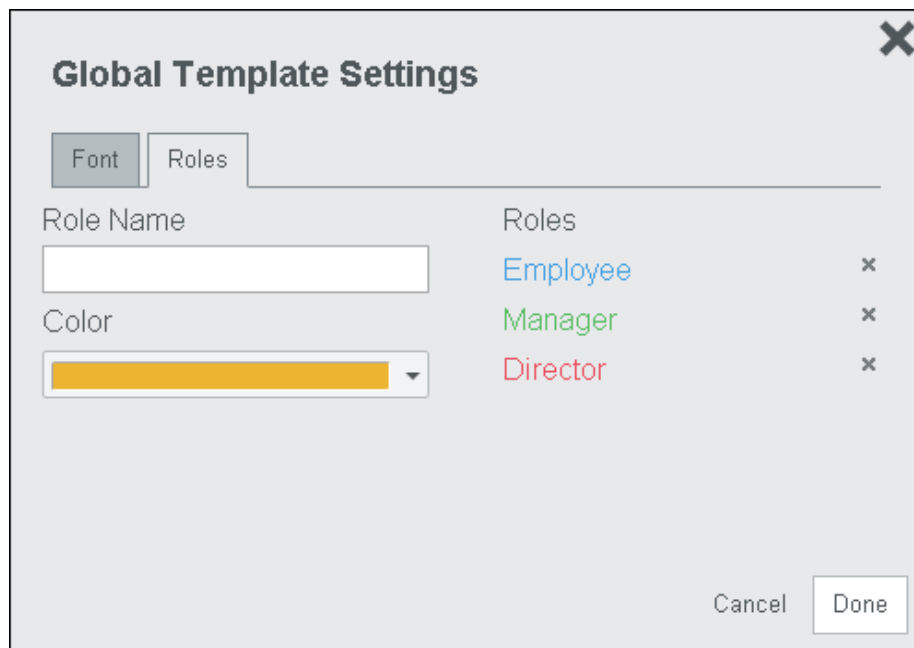
> 📄 The colors apply to each role by default in the following order: blue, green, red, gold and black. If you want to select a different color for a role, you must select the color before clicking the "Checkmark" or pressing "Enter". Note the maximum number of roles you can create is five.

4. Repeat steps 1-3 and create a Manager (color green) and Director (color red) role. When you are done creating roles, click **Done**:

5. Go to the top of the template and click **Save**.

Assigning Roles to Fields

This section assumes you have created roles in the section above titled, "Adding Roles".

Use the following steps to assign roles to fields in the template:

1. In this example, click on the **Form CA Received** field and the Properties Panel is displayed:

2. Click on the **Role** drop-down and select **Employee**. The field turns blue indicating the field is required for an Employee to review and fill out.

3. Click on the **Funds Received Date** field and the Properties Panel is displayed:

4. Click on the **Role** drop-down and select **Manager**. The field turns green indicating the field is required for a Manager to review and fill out.

5. Click on the **Examined By** field and the Properties Panel is displayed:

6. Click on the **Role** drop-down and select **Director**. The field turns red indicating the field is required for a Director to review and fill out.

7. Once you have assigned all of the roles to the desired fields, click **Save** at the top of the template.

Assigning an Input Mask to a Text Box

By adding an Input Mask to a text box, you can require a signer to fill in the text box with specific information, such as a Phone Number, Social Security Number, Date, Zip Code, or Model Number. Valid entries for the Input Mask are: # - Numeric, A - Alphabetic, and * - Alphanumeric.

Use the following steps to add an Input Mask to a field which requires a telephone number:

1. Create a **text box**.
2. In the Properties Panel, enter **(###)###-####** in the Input Mask field.
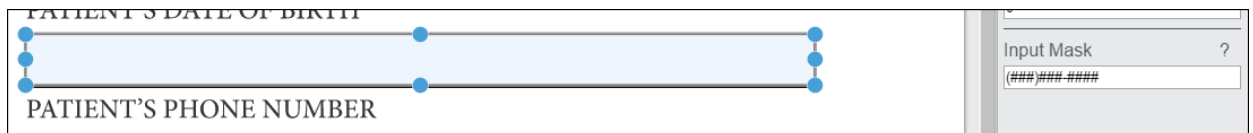
3. Click **Save** at the top of the template.

Use the Form Field Detector

The E-Signature Module's Form Field Detector supports the ability for you to upload a PDF document or raster image with form fields, auto-detect and convert the active fields for the E-Signature Template. You can modify the fields as needed and share the document with another user who will complete and sign the document. The Form Field Detector facilitates a fast, convenient and more secure process for working with PDF documents and raster images with form fields.

Supported Fields

Field Type	Description
Button Fields	Check box and Radio button field types are supported. The Push-button field type is not supported.
Text Fields	Are supported, including limited support for font and color attributes.
Choice Fields	Not supported.
Signature Fields	Are supported.

Adding a PDF file or Raster Image to the E-Signature Splash Screen

> 📋 This guide assumes you have access to the E-Signature sample application included in the Windows Client Installer.

Use the following steps to upload and convert a document using the Form Field Detector:

> 📋 The following example uses a PDF file, but the same process can be used for a raster image with form fields.

1. Launch the E-Signature sample application located at:
   http://localhost:18000/PrizmDoc_HTML5_Viewer_NET_WEBFORMS/e-signature-splash/.
2. From the splash screen, under **Create a New Template**, drag and drop the **PDF file** that you want to use:
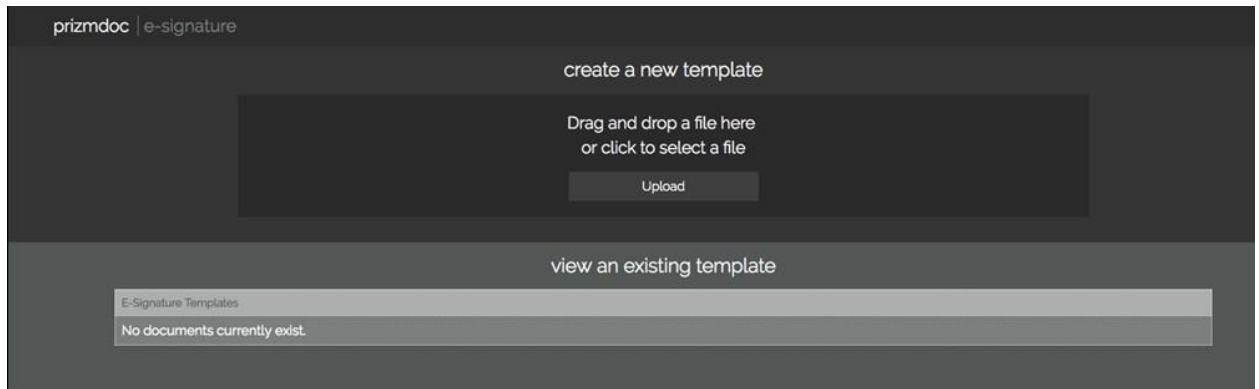
3. The Convert Document dialog displays:
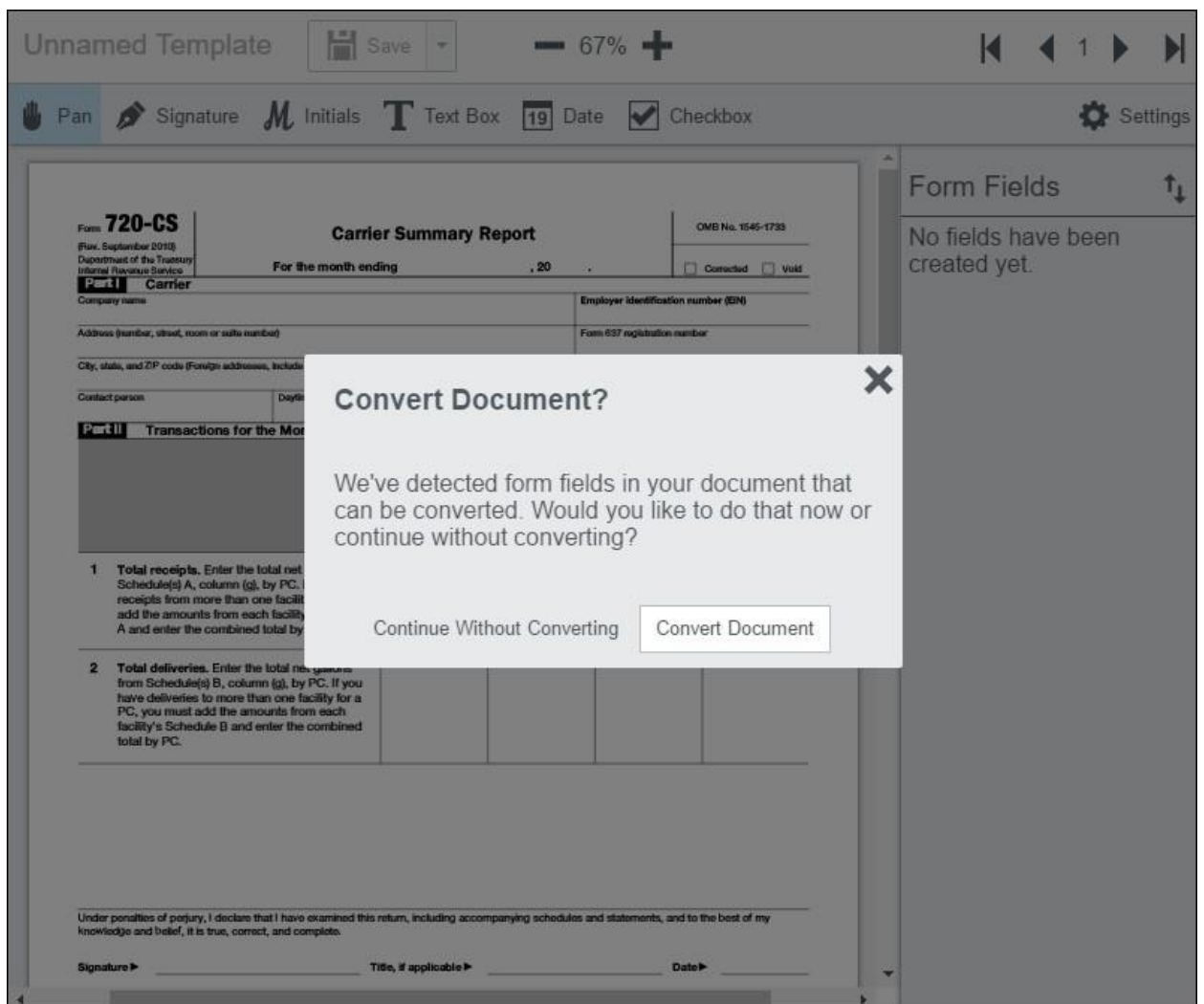
Choose to either **Continue Without Converting** or **Convert Document**. (If you choose Continue Without Converting, the PDF file will open, but the form fields will not be converted.)

4. After you click **Convert Document**, the Convert Document Progress dialog displays:
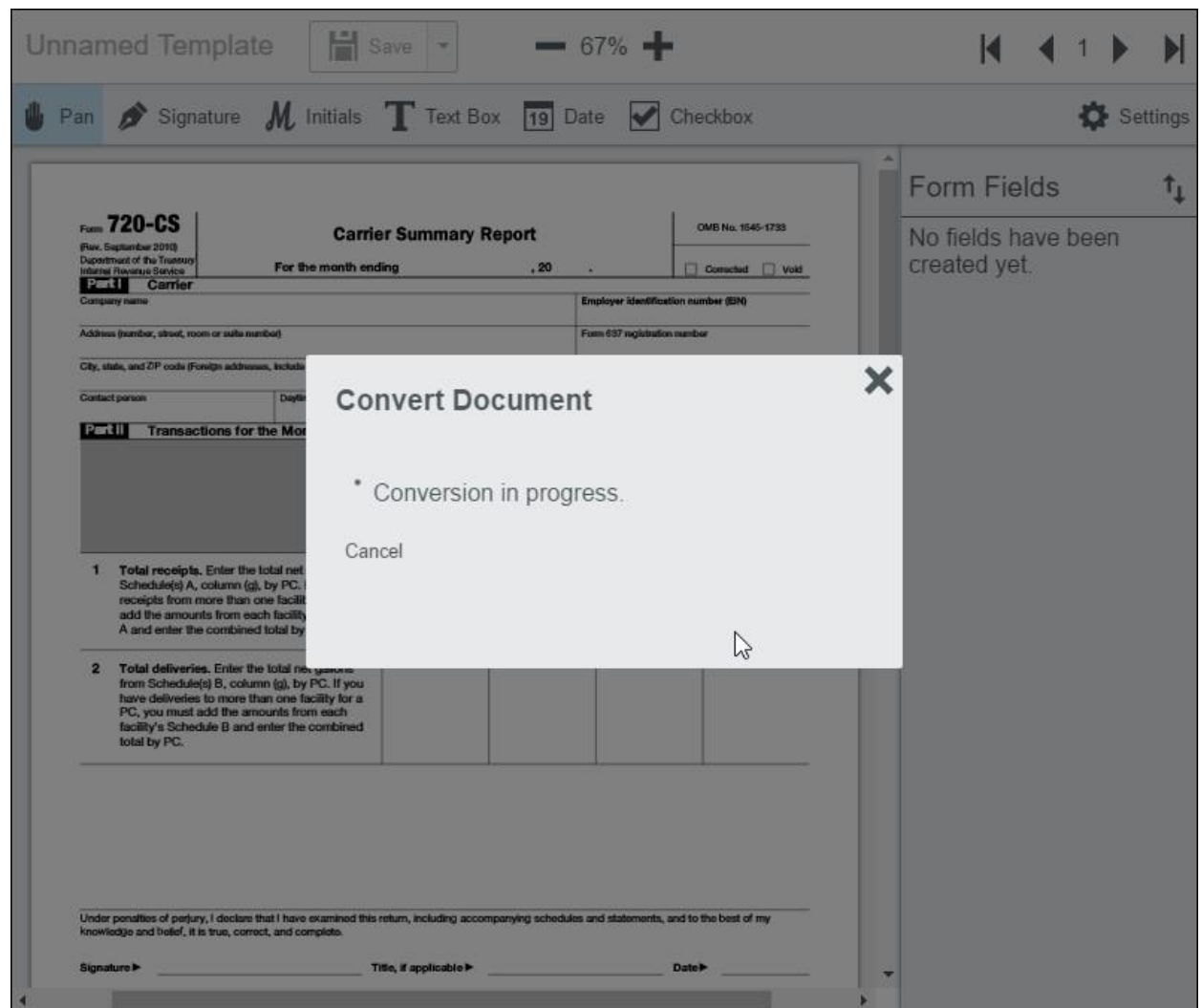
5. Once the PDF file has successfully converted, the Document Form Fields Converted dialog displays:
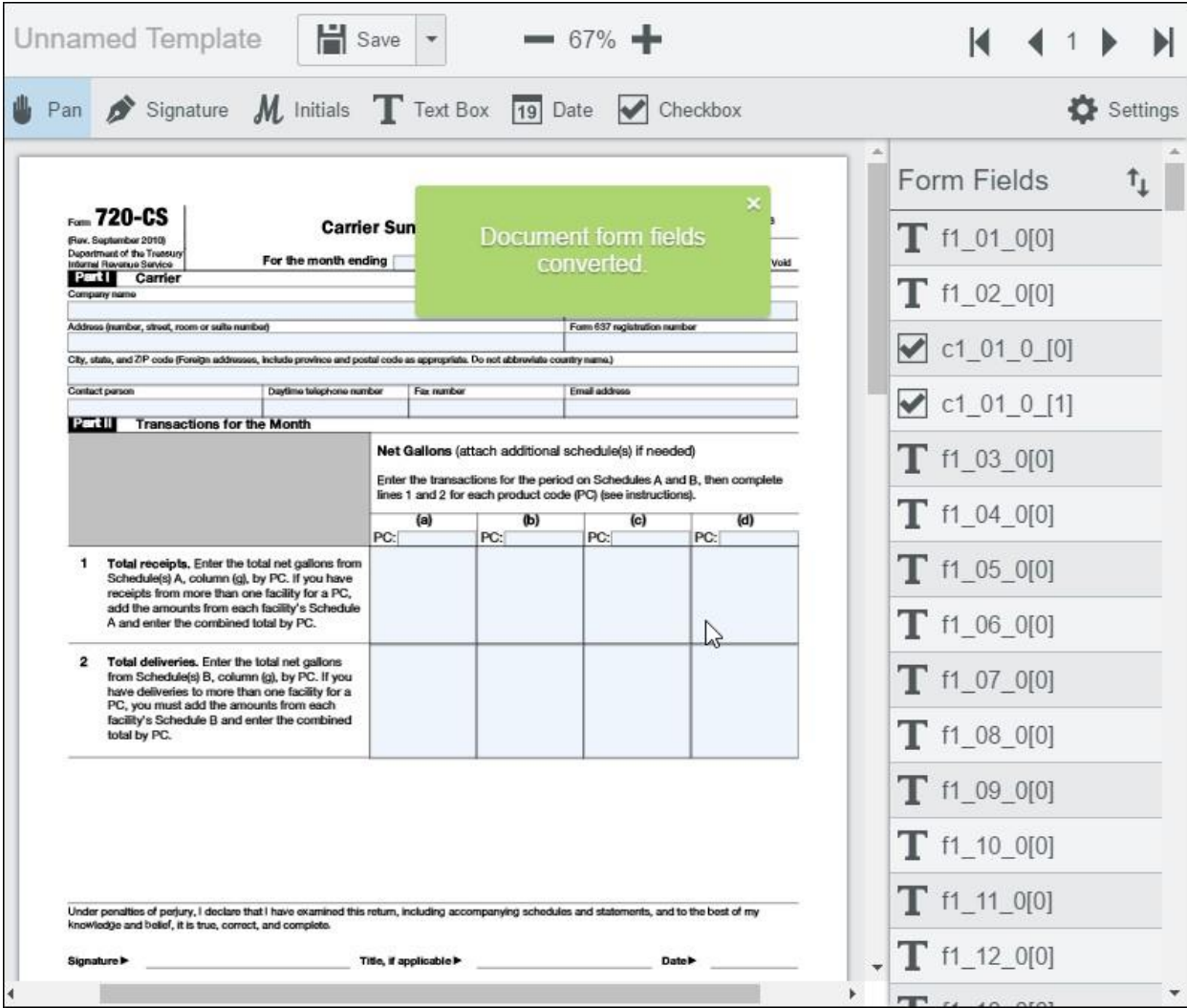
6. The PDF file is displayed within the Template Designer and you can click on the converted fields and make changes as desired:

7. After you have finished making your changes, you can name the template and save it.

Refer to the following topic for possible error messages:

- Form Field Detector Error Messages

Making Additional Changes to Your Template

For details on how to make additional changes to your template, refer to the following topics:

- How to Set up a Basic Template
- How to Add Features to a Template

Signing the Template

For information on how to sign a PDF that has been converted to an E-Signature Template, refer to the following topic:

- Sign a Form Converted by the Form Field Detector

Form Field Detector Error Messages

You may encounter error messages for the following reasons:

- Generic error detecting form fields in the uploaded document.
- Form Field Detector feature is not licensed.
- The Form Field Detector fields do not have a matching PrizmDoc Viewer E-Signature field.
- Documents that contain XFA fields are not currently supported.

Example Error Messages

Conversion failed:
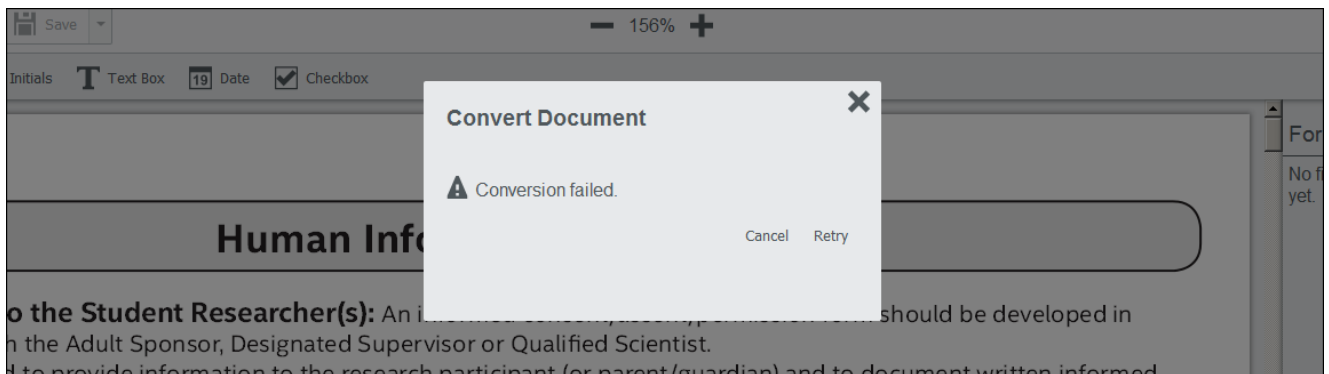
Form fields are not supported:

XFA fields are not currently supported:

Signers - Fill out a Form

This section contains information on how to fill out forms:

- Tools Reference
- Fill Out a Form
- Sign a Form with Multiple Roles
- Sign a Form Converted by the Form Field Detector

Tools Reference

This section covers the following features:

- Example of a Form in the E-Signature Viewer
- Form Name
- Checklist
- Zoom In / Zoom Out
- Page Navigation
- Example of a Required Field
- Example of an Optional Field
- Progress Bar
- Download Signed Form

Example of a Form in the E-Signature Viewer

The following example shows a form displayed in the main E-Signature viewer:

Form Name

The following example shows the Form Name:
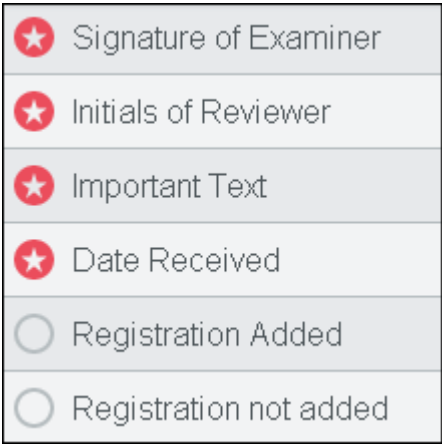
- This is not an editable field.

Checklist

The following example shows the Checklist Icon:

1. When you click on the **Checklist** icon, the Checklist expands:

- The **red star** indicates a **required** field.
- The **grey circle** indicates an **optional** field.

2. When you fill out a required field, the red star turns to a green check mark. When you fill out an optional field, the grey circle also becomes a green check mark:

Zoom In / Zoom Out

The following example shows the Zoom In / Zoom Out Toolbar:

- Minus Sign - click to zoom out
- Percentage - displays the viewing percentage
- Plus Sign - click to zoom in

Page Navigation

The following example shows the Page Navigation Toolbar:

- First Page - click to go to the first page of the form
- Previous Page - click to go to the previous page
- Next Page - click to go to the next page
- Last Page - click to go to the last page of the form

Example of a Required Field

The following example shows a field with a red star which indicates that it must be filled out:

Required Checkboxes will not have a red star next to them on the form, but they will display in the Checklist as required.

Example of an Optional Field

The following example shows two checkboxes that are optional and can be left blank:

Progress Bar

The following examples show the different stages of the progress bar:

- The Progress Bar is grey prior to you filling out the form fields:

- When you start filling out some of the fields, the Progress Bar turns blue:

- After you have filled out all of the required fields, the Progress Bar turns green and you can download the signed form:

If you exit a form without filling in all the fields, a message appears, "Confirm Navigation - Warning: You have made changes, download before continuing. Are you sure you want to leave this page?" Click 'Leave this Page' to exit without downloading changes or click 'Stay on this Page' to fill out the remaining fields and download your changes.

Download Signed Form

The following examples show the Download Signed form button:

- The Download Signed Form button is grey prior to you filling out the template fields:

The Download Signed Form button remains inactive until you fill out all the required fields.

- When you fill out all the required fields, the Download Signed Form button is activated:

Fill Out a Form

This topic contains the options and steps for filling out a form:

- Working with Large Files
- Opening a Form
- Working with Signatures
- Working with Initials
- Working with Text Boxes
- Working with Dates
- Working with Checkboxes

Working with Large Files

Note that if you open, scroll-through or use set page number for a very large file, you may see the spinning circle (highlighted in yellow below) displayed in the middle of the Viewer while the document loads:
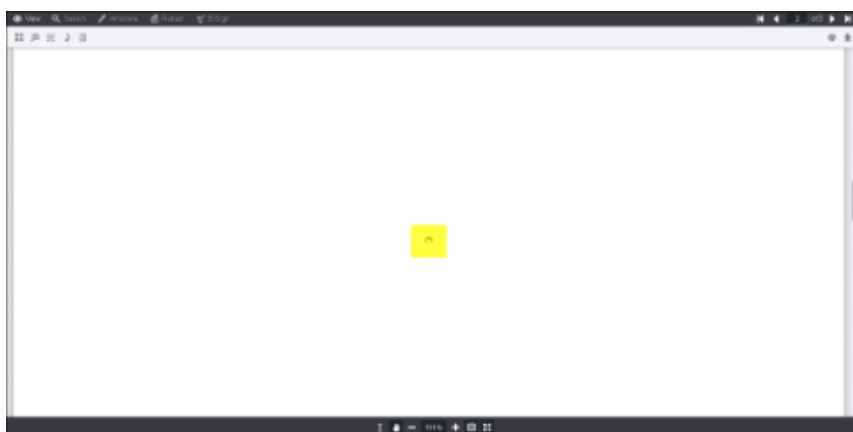
Opening a Form

1. From the splash screen, under View an Existing Template section, click on **View** next to the template you want to fill out:
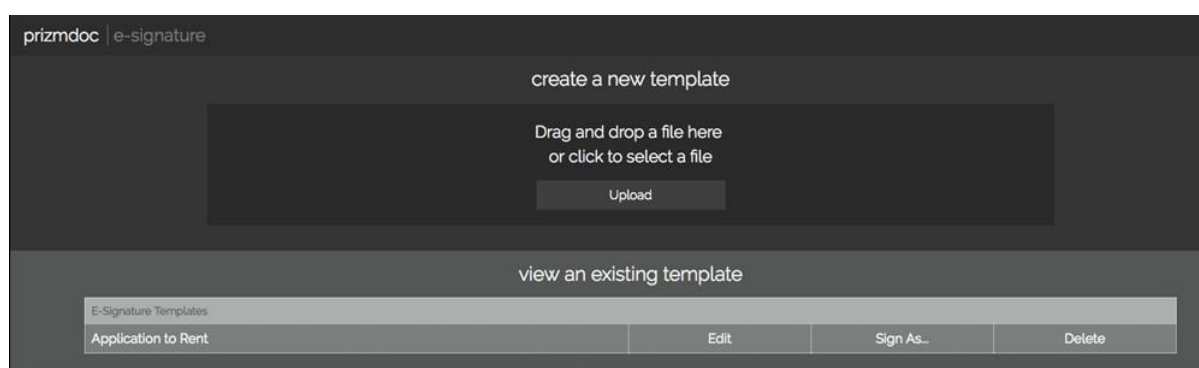
2. The template is displayed in the Viewer and the Checklist pane displays:

3. The required fields have a red star next to them and the optional fields have a grey circle.

> 📝 Required Checkboxes will not have a red star next to them on the form, but they will display in the Checklist as required.

4. Starting with the first item in the Checklist, you can press the **Tab** key to move through the fields on the from. You will need to use the mouse to choose a date, draw a signature, draw initials or select a checkbox.

Working with Signatures

You can create both drawn and typed signatures to use throughout the document. You can also remove them from the document or delete them permanently and start over with new signatures. This section covers these options in detail.

Drawing a New Signature

1. Click on the **first item** in the list. In this example, click on **Signature of Examiner**. The form focus moves to the Signature field.
2. Click in the **Signature** field and the Draw or Type a New Signature dialog box displays:

3. To draw a new signature, click on **Draw a New Signature**. The Draw Signature dialog box displays:

4. With your mouse, **draw your signature** above the line. You have the option to Retry, Set as default, Cancel or Save. When you are finished, click **Save**. Your signature is placed in the Signature field.

Typing a New Signature

1. To type a new signature, click on **Type a New Signature**. The Type a New Signature dialog box displays:
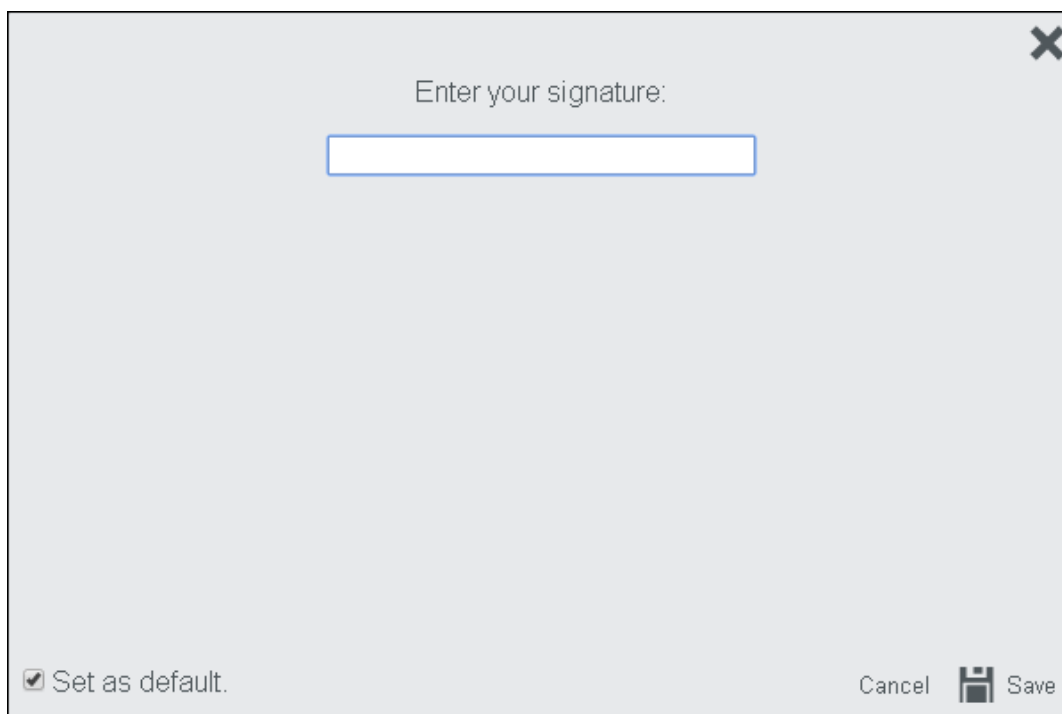
2. Type your **signature** in the Text box. Your signature displays in a variety of fonts:

3. You have the option to Set as default, Cancel or Save. Click on the signature you want and click **Save**. Your signature is placed in the Signature field.

Applying a Signature

1. To apply a different signature, click in the **Signature** field. The Signature dialog box displays:

2. Scroll to the signature you want to use and click **Apply to document**.
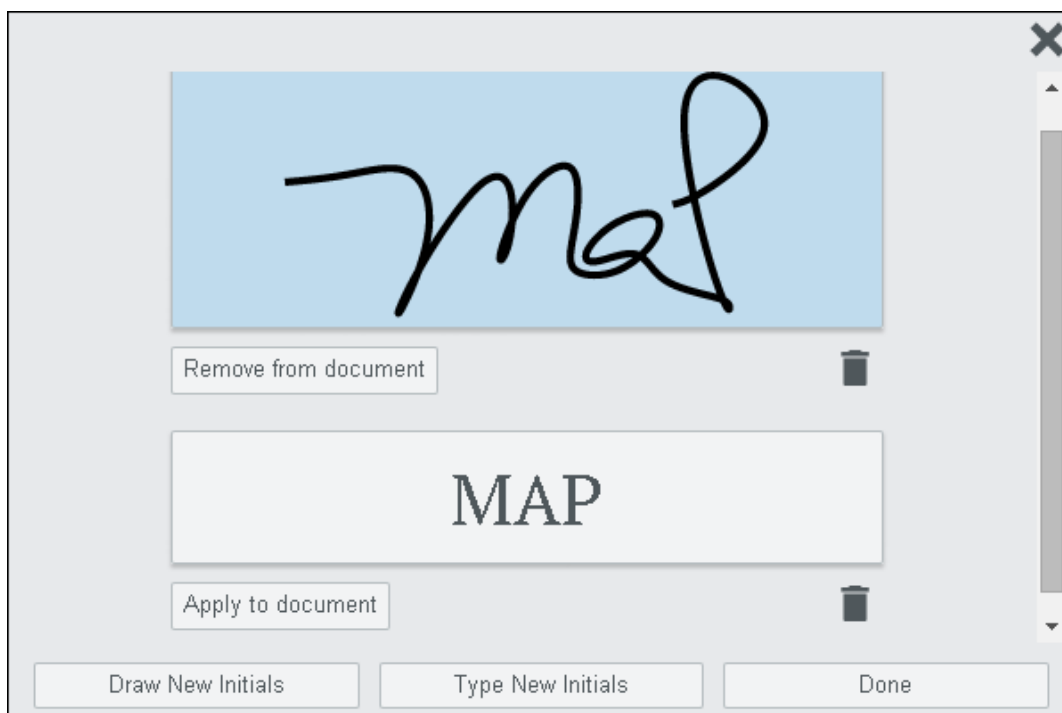3. Click **Done**.

Removing a Signature

1. To remove a signature from the document, click in the **Signature** field. The Signature dialog box displays:
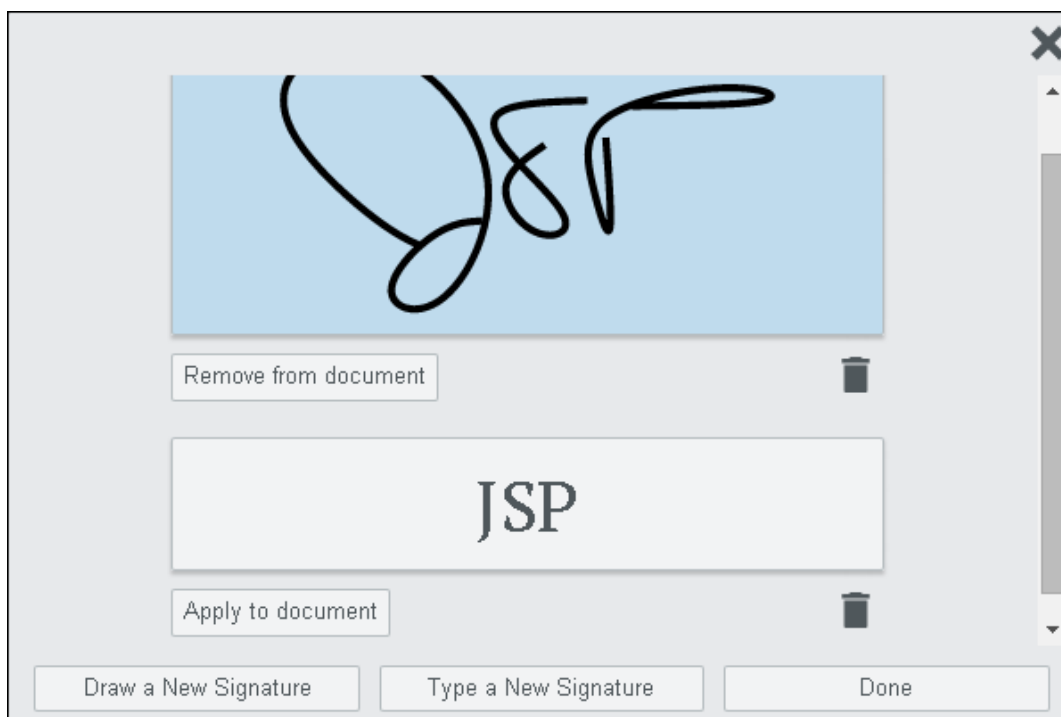
2. Scroll to the signature you want to remove and click on **Remove from document** (this removes the signature from the document, but keeps it available to use again if you want).
3. Click **Done**.

Deleting a Signature

1. To delete a signature from the document, click on the **Signature** field. The Signature dialog box displays:
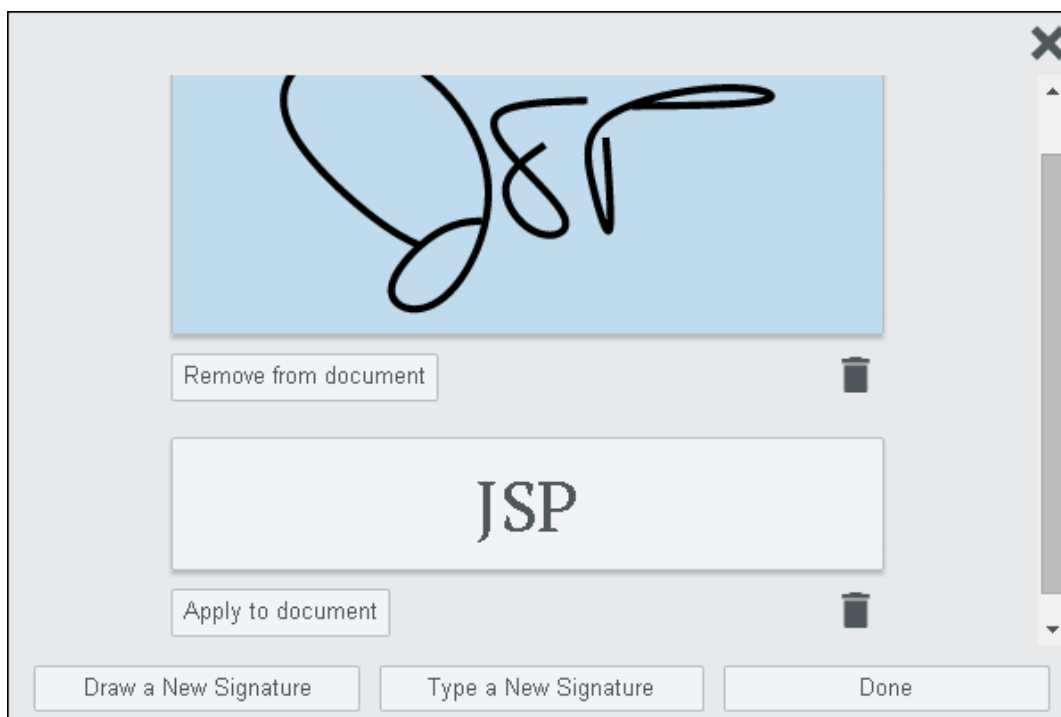
2. Click on the **Delete** (trash can) icon.
3. The signature is deleted from the E-Signature form completely and is not available for use again.

4. Click **Done**.

Working with Initials

You can create both drawn and typed initials to use throughout the document. You can also remove them from the document or delete them permanently and start over with new initials. This section covers these options in detail.

Drawing New Initials

1. Click on the **second item** in the list. In this example, click on **Initials of Reviewer**. The form focus moves to the Initials field.
2. Click in the Initials field and the Draw or Type New Initials dialog box displays:

You don't currently have any initials.

Draw New Initials

or
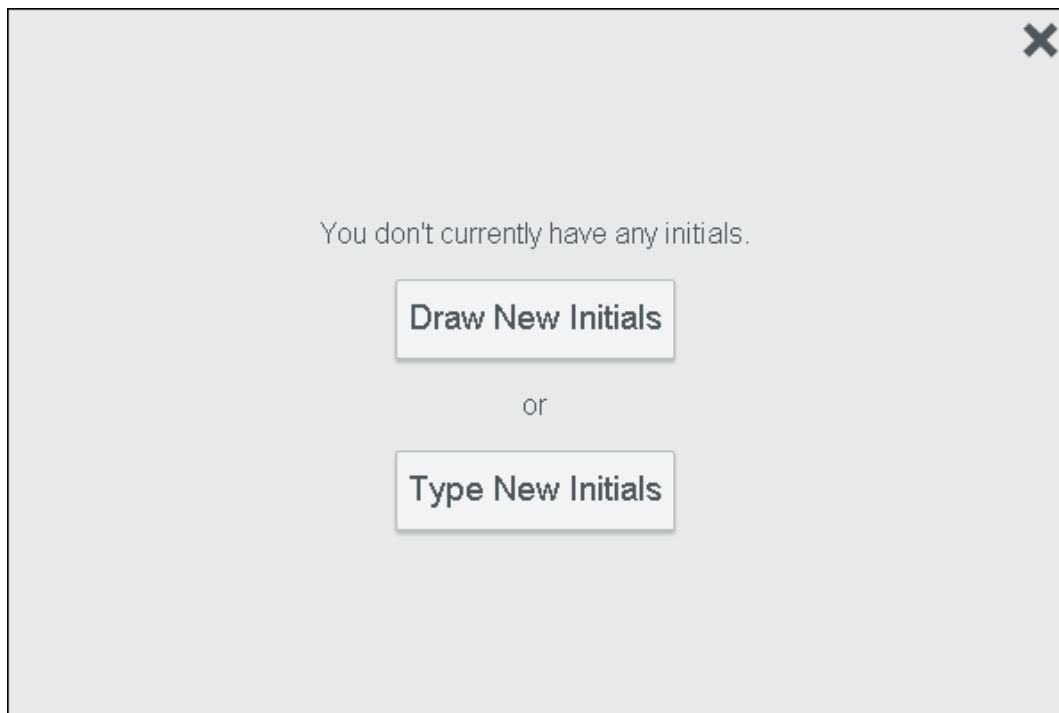
Type New Initials

3. To draw new initials, click on **Draw New Initials**. The Draw Initials dialog box displays:

4. With your mouse, **draw your initials** above the line. You have the option to Retry, Set as default, Cancel or Save.
5. When you are finished, click **Save**. Your initials are placed in the Initials field.

Typing New Initials

1. To type new initials, click on **Type New Initials**. The Type a New Initials dialog box displays:
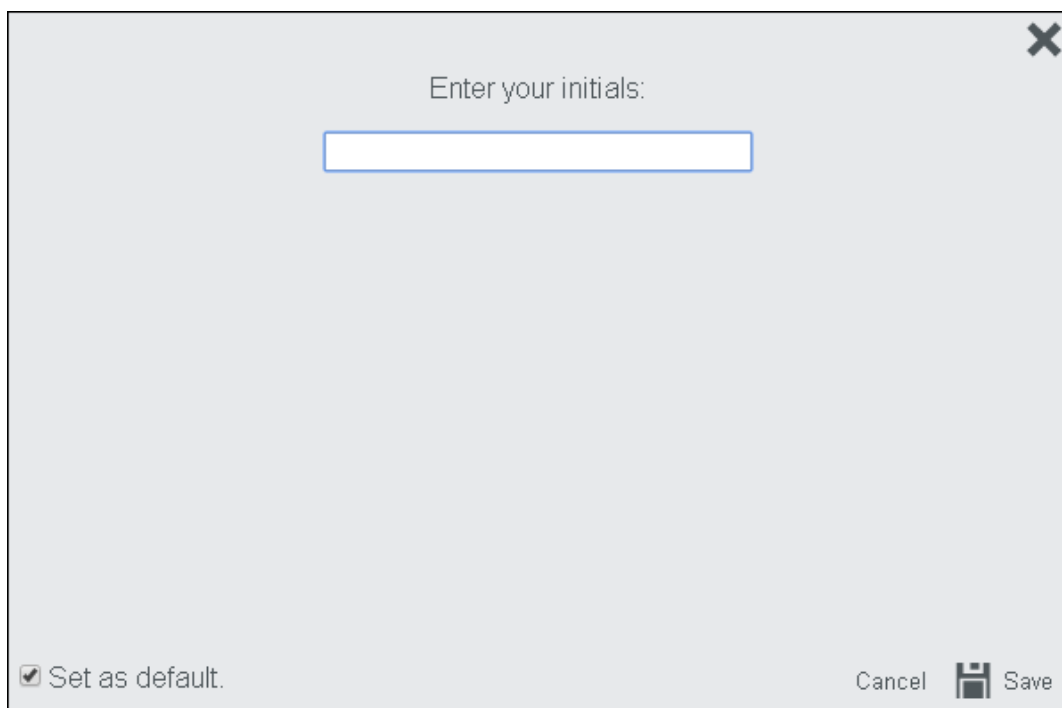
2. Type your **initials** in the Text box. Your initials display in a variety of fonts:
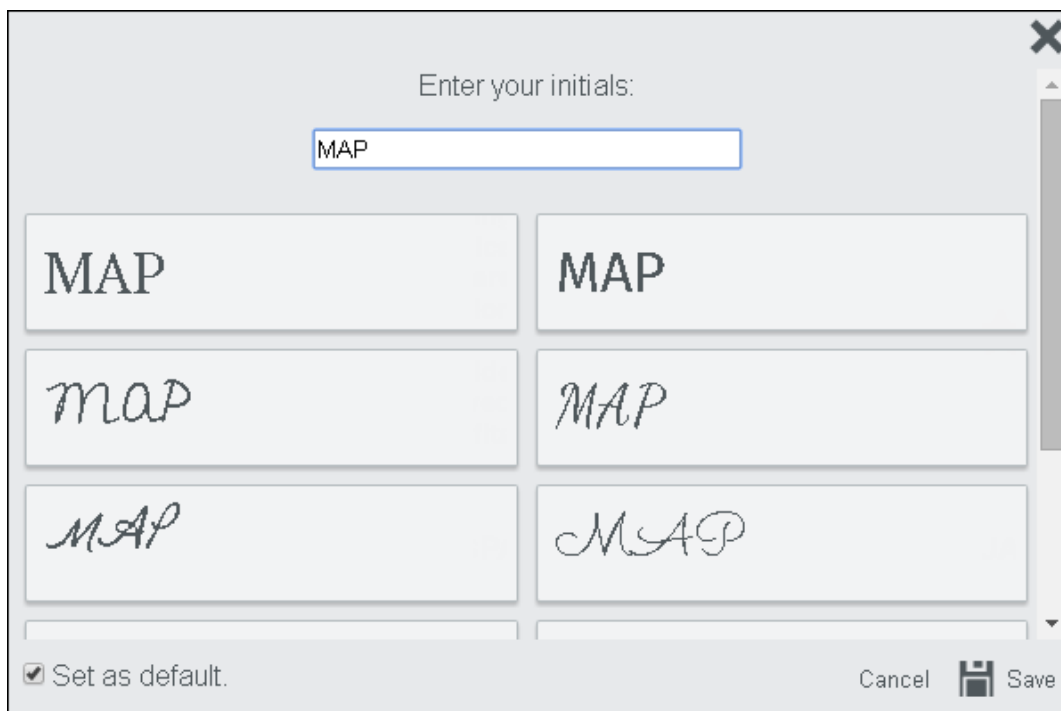
3. You have the option to Set as default, Cancel or Save.
4. Click on the initials you want and click **Save**. Your initials are placed in the Initials field.

Applying Initials

1. To apply different initials, click in the **Initials** field. The Initials dialog box displays:

3. Scroll to the initials you want to use and click **Apply to document**.
4. Click **Done**.

Removing Initials

1. To remove initials from the document, click in the **Initials** field. The Initials dialog box displays:

2. Scroll to the initials you want to remove and click on **Remove from document** (this removes the initials from the document, but keeps them available to use again if you want).

3. Click **Done**.

Deleting Initials

1. To delete initials from the document, click on the Initials field. The Initials dialog box displays:

2. Click on the **Delete** (trash can) icon.

3. The initials are deleted from the E-Signature form completely and are not available for use again.

4. Click **Done**.

Working with Text Boxes

Adding Text

1. To add text, click in the **Text Box** field:

2. Type in the required or optional text. Note that if the text box allows multiple lines of text, you will see a scroll-bar appear on the right side of the text box as you are typing:

Note that some fields may have been designed with an Input Mask on them. In this case, you will see light gray text in the field showing the expected format of the text and you will only be able to enter certain characters. In this example, you will only be able to enter numbers:

An Input Mask field could be for any of the following: Date, Social Security Number, Phone Number, Zip Code, or Model Number.

3. Click outside of the text box and go to the next field.

If the box outline turns red, you have exceeded the character limit of the text box:

You must edit/delete some of the text within the text box.

Working with Dates

Adding Dates

1. To add a date, click in the **Date** field. The date picker displays:

2. Click on the **date** you want and the date is entered into the Date field.

Working with Checkboxes

Selecting Checkboxes

Depending on how the form was designed, you will be able to select either:

- One checkbox out of group
- Several checkboxes in a group

1. To select a checkbox, click in the **Checkbox**. The check mark displays in the checkbox:

Required Checkboxes will not have a red star next to them on the form, but they will display in the Checklist as required.

Sign a Form with Multiple Roles

This topic contains the steps for signing a form that has multiple roles. For example, an Employee, a Manager and a Director all need to review and sign a form. Note that for ease-of-use, after each role/reviewer has filled out the required fields and the Download button is enabled, the user gets a copy of the form and another copy is stored so that the remaining roles/reviewers can see the information already added to the form.

To review and fill out a form with multiple roles:

Employee Example

In this example, the Employee role/reviewer is going to open and fill out the form first:

1. From the **E-signing** Splash Screen, under **View an Existing Template**, click **Sign As...** next to the form you want to fill out:
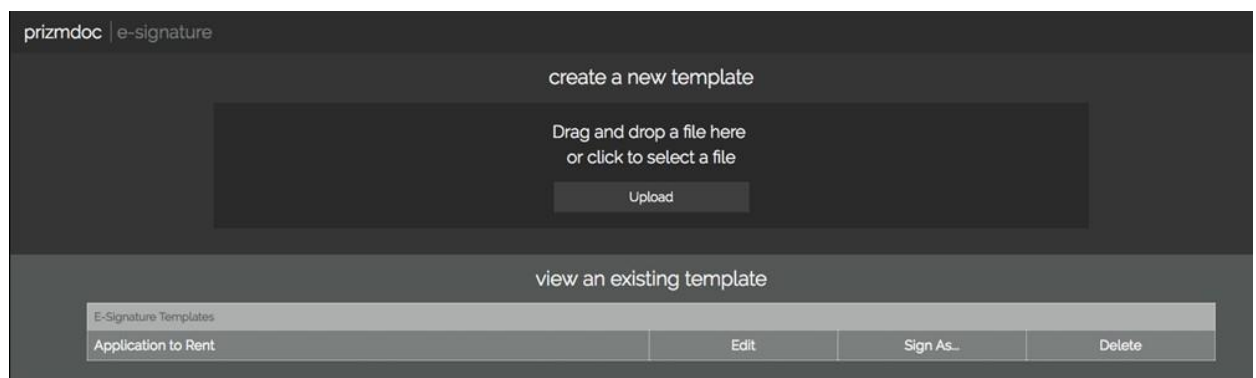
2. The Sign As... dialog is displayed. For this example, choose the **Employee** role:
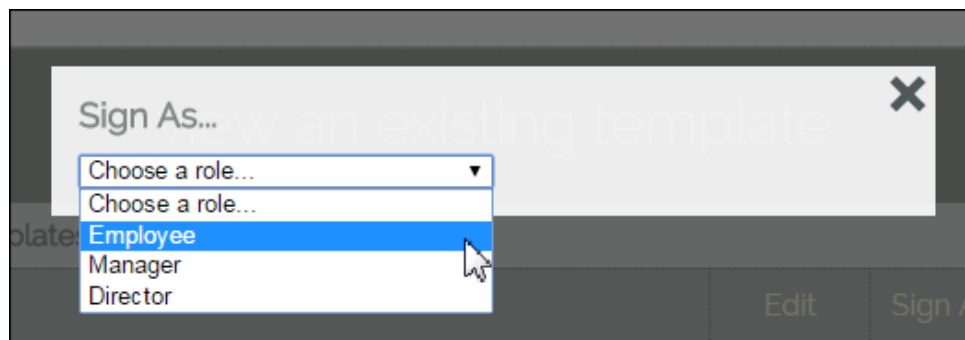
3. The form is displayed in the Viewer and all the fields that are required for the **Employee** are highlighted in **blue**:

4. Once all the required fields are filled out, the **Download Signed Form** button is enabled:

5. Click the **Download Signed Form** button and the burn-in process begins. Once the burn-in is complete, the **Document ready to download** dialog is displayed:

6. Click **Save** and a copy of the file is available to save to the computer. Note that the Employee's changes have also been saved in a copy of the form so the next role/reviewer can open the form and see their edits.

Manager Example

In this example, the Manager role/reviewer is going to open, review and fill out the form after the Employee (described in the steps above).

1. From the **E-signing** Splash Screen, under **View an Existing Template**, click **Sign As...** next to the form you want to review and fill out:
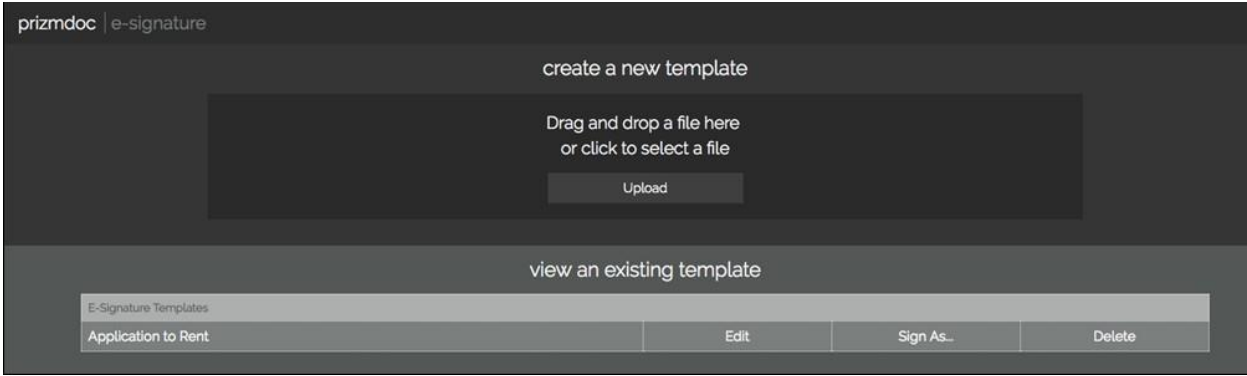
2. The Sign As... dialog is displayed. For this example, choose the **Manager** role:
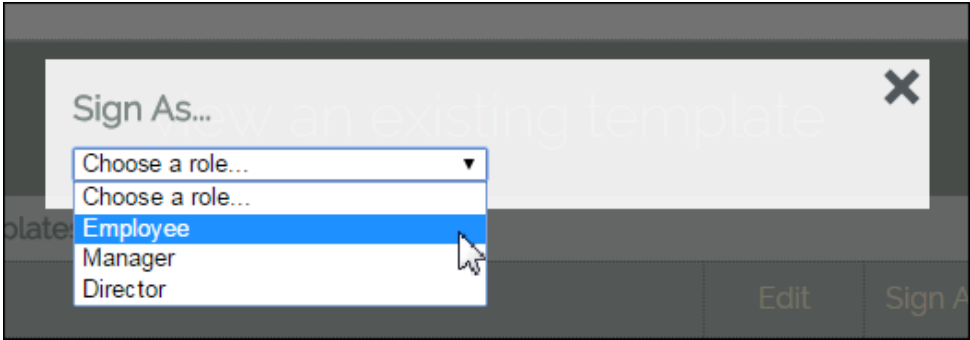
3. You can **drop a burned document** in the dialog or click to **select a file**. The form is displayed in the Viewer and all the fields that are required for the **Manager** are highlighted in **green**:

4. Once all the required fields are filled out, the **Download Signed Form button** is enabled:

5. Click the **Download Signed Form button** and the burn-in process begins. Once the burn-in is complete, the **Document ready to download** dialog is displayed:

6. Click **Save** and a copy of the file is available to save to the computer. Note that the Manager's changes have also been saved in a copy of the form so the next role/reviewer can open the form and see their edits.

Director Example

In this example, the Director role/reviewer is going to open, review and fill out the form after the Manager (described in the steps above).

1. From the **E-signing** Splash Screen, under **View an Existing Template**, click **Sign As...** next to the form you want to review and fill out:
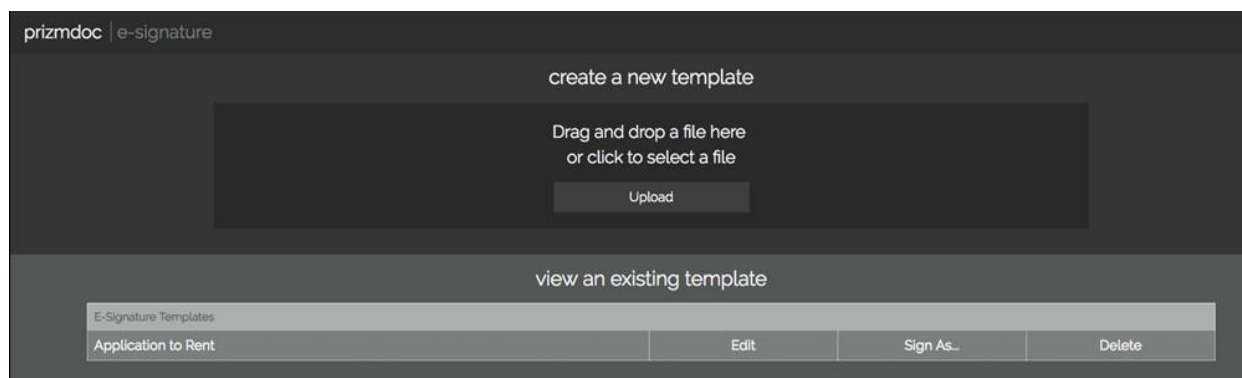
2. The Sign As... dialog is displayed. For this example, choose the **Director** role:
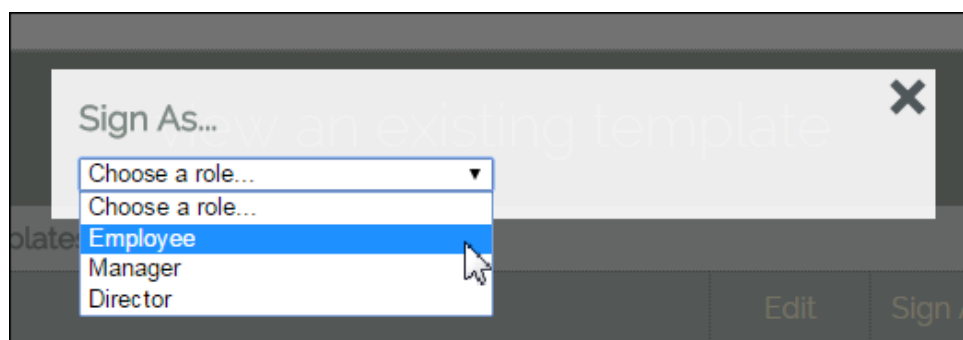
3. You can **drop a burned document** in the dialog or click to **select a file**. The form is displayed in the Viewer and all the fields that are required for the **Director** are highlighted in **red**:

4. Once all the required fields are filled out, the **Download Signed Form button** is enabled:

5. Click the **Download Signed Form button** and the burn-in process begins. Once the burn-in is complete, the **Document ready to download** dialog is displayed:

6. Click **Save** and a copy of the file is available to save to the computer. Note that the Director's changes have also been saved in a copy of the form so the next role/reviewer can open the form and see their edits.

📝 Repeat these steps for each additional role that is required for your document review process.

Sign a Form Converted by the Form Field Detector

The E-Signature Module's Form Field Detector auto-detects forms in a PDF or raster image document and facilitates the conversion to an E-Signature template. You can open the E-Signature template, fill out the form, sign and download it to share with other users. This feature creates a fast, convenient and more secure process for working with PDF documents.

Viewing an E-Signature Template from the E-Signature Splash Screen

Use the following steps to view, edit, sign and download a document using the Form Field Detector:

1. From the splash screen, under **View an Existing Template**, click **Sign** next to the document you want to view:
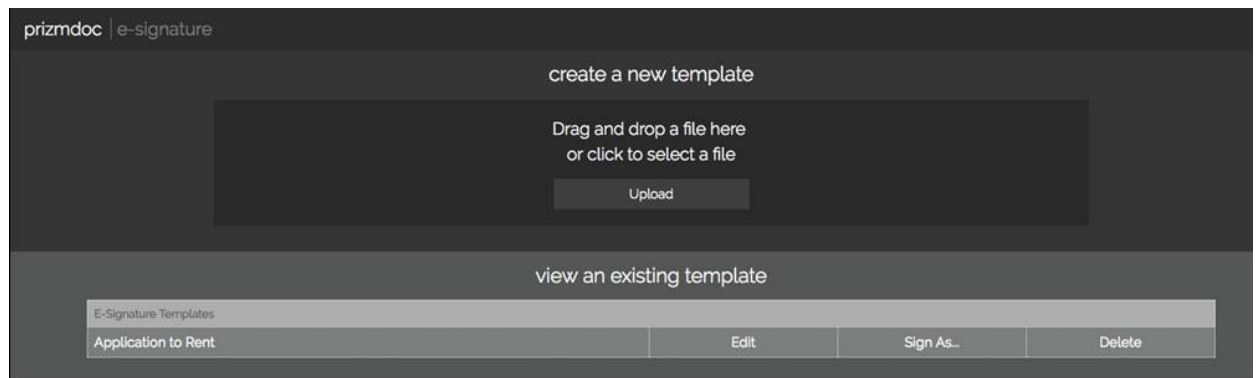
2. The document opens in the E-Signature Viewer:

Fill out the fields and type in your signature at the bottom of the document.

3. When you are finished, click **Download Signed Form** and the Download Signed Form dialog displays:
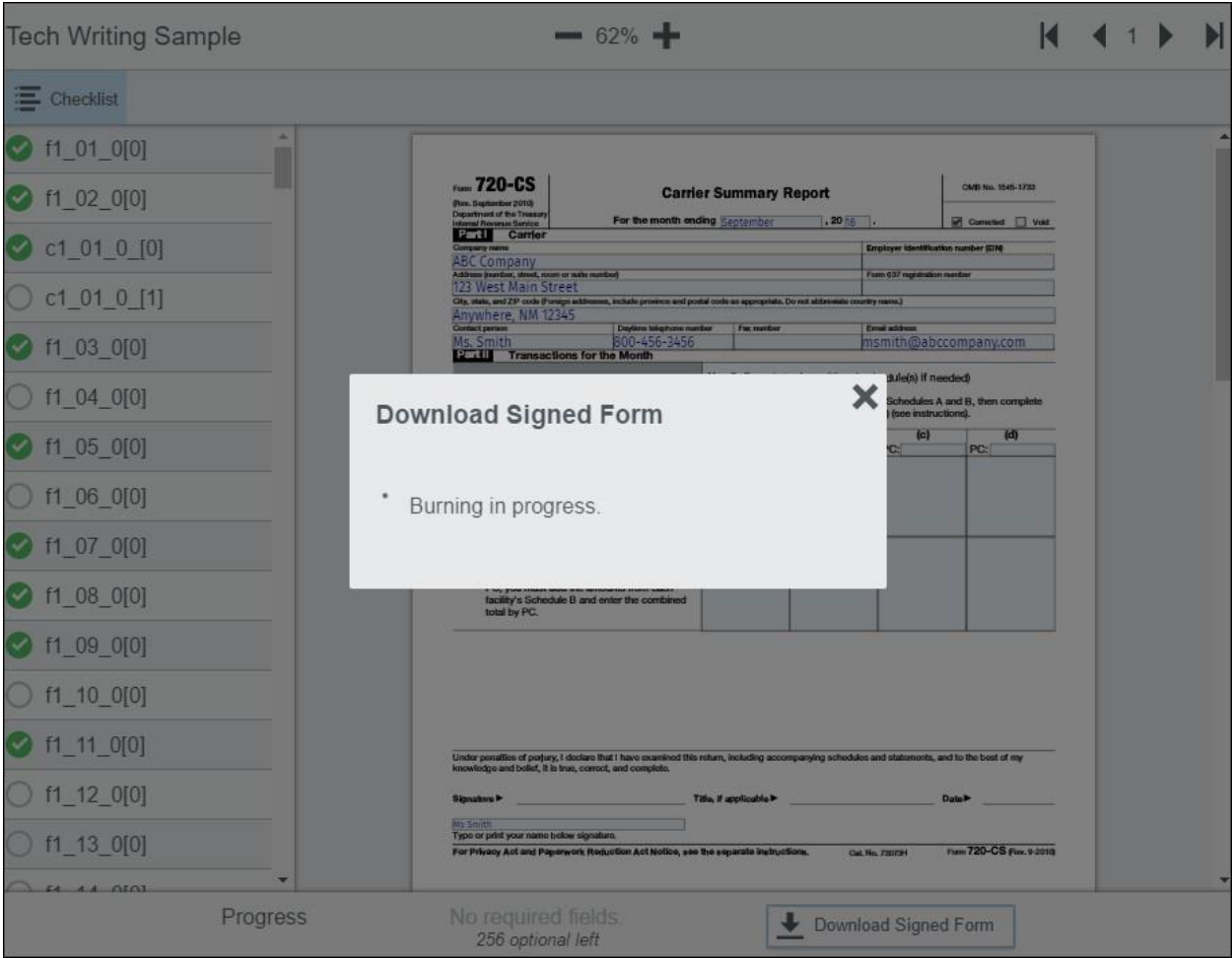
4. Once the document is ready to be downloaded, the Download Signed Form dialog displays. Click **Save**:
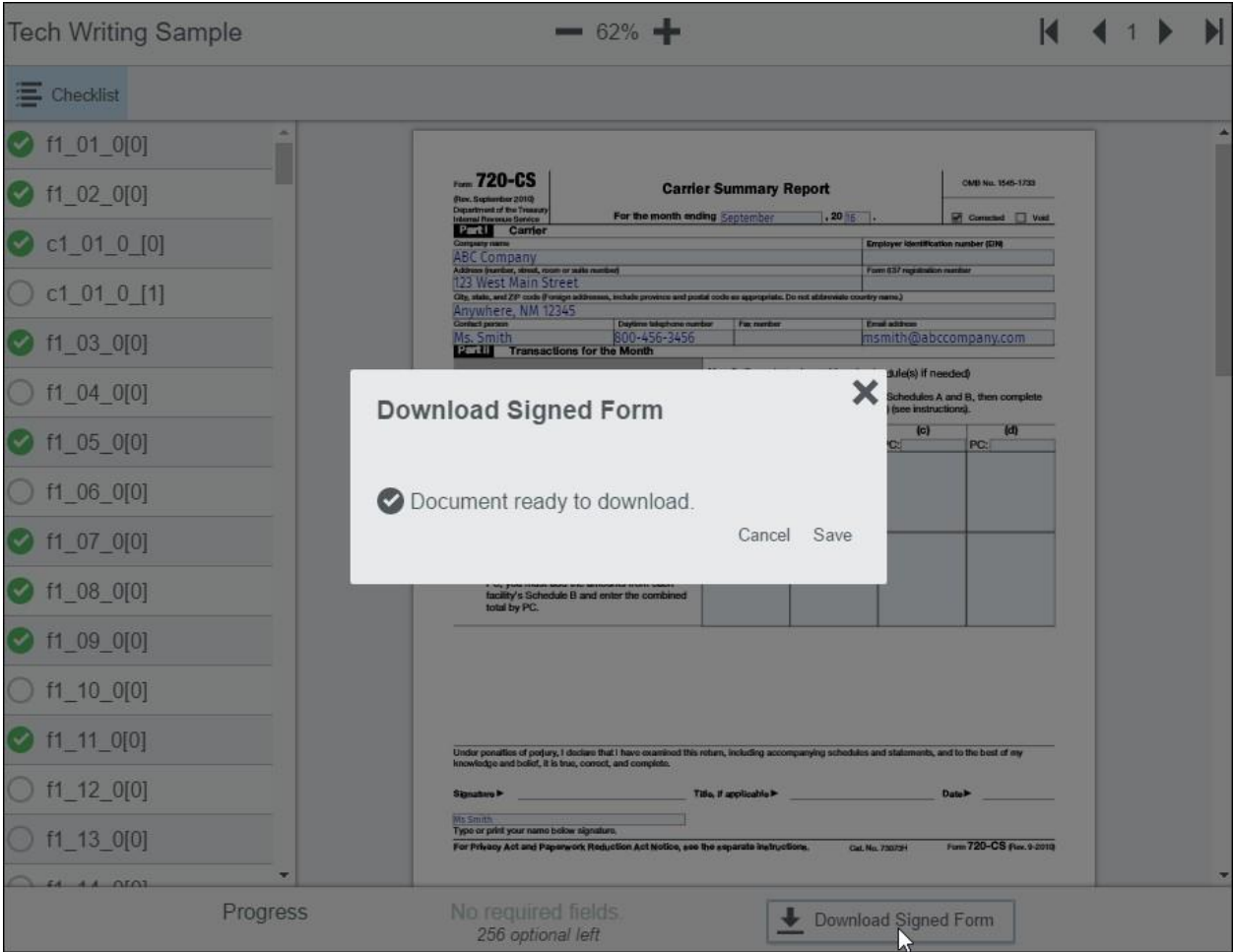
5. You can open the downloaded document to view and share:

1   Index