



What you see is what you sign

Signature Wizard Designer User Guide

Rev. 1.0



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Introduction

This guide describes how to set up document templates for use with *VPSign client runtime* and *VPSign VPad*, using the *Signature wizard designer*.

- *VPSign client runtime* facilitates and control document routing to and from VPSign's *VPad*.
- *VPSign VPad* enables end-customers to comfortably review, remark and/or securely and naturally, sign full-view documents presented on its display.

These two modules work together to let power users easily integrate VPSign's solutions with existing operating space and information systems.

The user guide is intended for personnel responsible for defining and setting the document handling procedures for desired business tasks requiring printout processes replacements for savings and efficiency. *Signature wizard designer* is a studio environment for creating signature boxes, extracting data fields from input documents for external use, dynamically setting input and output filenames and adding powerful add on scripts for best and efficient document processing and integrating.

Overview

Business paper based document processing can be easily replaced now by full efficient time and money saving electronic process from end-to-end, using *VPad* and *VPSign suite*. Integration is made short and light, using the user friendly, easy learning, *Signature wizard designer*.

SWD interface is specially built to assist any power user to create document templates for *VPad* processing, from any source, format or system: word, pdf, tiff, legacy systems printouts, ERP, CRM etc. This task involves first time document capturing, document unique type identification, defining different and dynamic input and output file name patterns for enhanced classification, tagging desired in-file texts strings for extraction and external use, adding before and after session scripts, managing template files and more.

Document Templates processing

Document templates are created by SWD and stored as XML files. While VPSign client engine process inbound document printed to it, searches for, identifies and matches the predefined associated template, and processes the incoming data according to the current template properties.



NOTE: Products of this stage are the VPad's input format files and additional Content-extract files.

User Exits

VPSign client exposes two user exit hooks for external enhancements during processing. These entry points can be used to add any pre or post session proceedings for enhancing document handling operations during its processing, according to the desired business need and demands. This is achieved using the powerful industry standard LUA scripting language, a full function widely used programming language that excels with its rich library of free functions and code. For further knowledge please visit <http://www.lua.org/>.

Blank page for double-sided printing.

Template Designing

This chapter describes how to design a new VPad template.

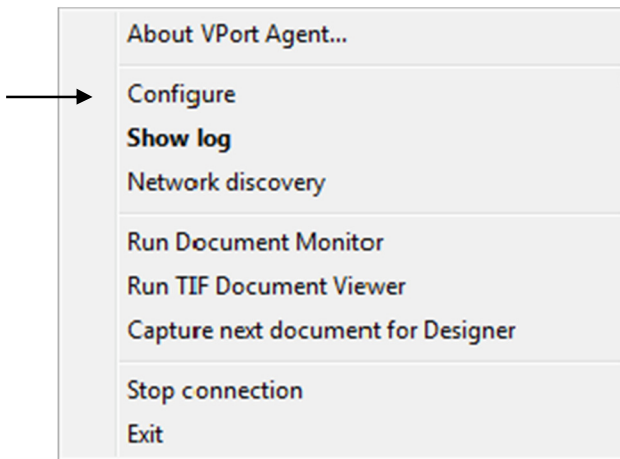
Capturing a document to designer

This section describes how to start template designing by capturing the first produced document into SWD workspace.

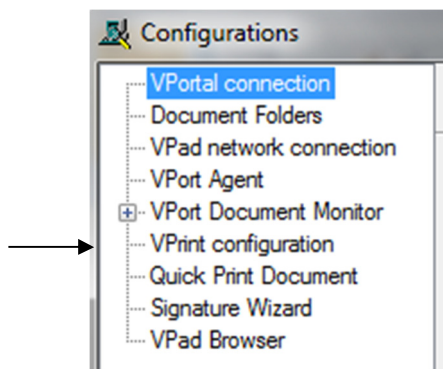
Initial setup

To configure the needed parameters for initially capturing a document to the Designer:

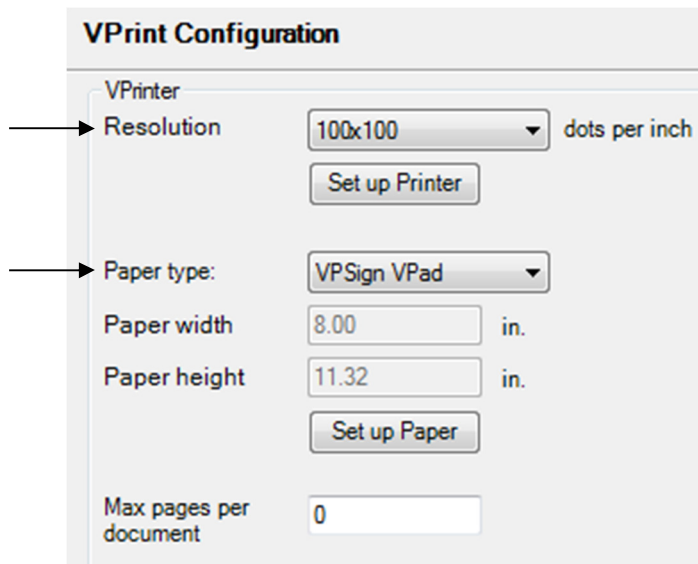
1. Right click the VPort agent icon in the system tray. Left Click "configure".



2. Choose "VPrint configuration" on the left menu tree.

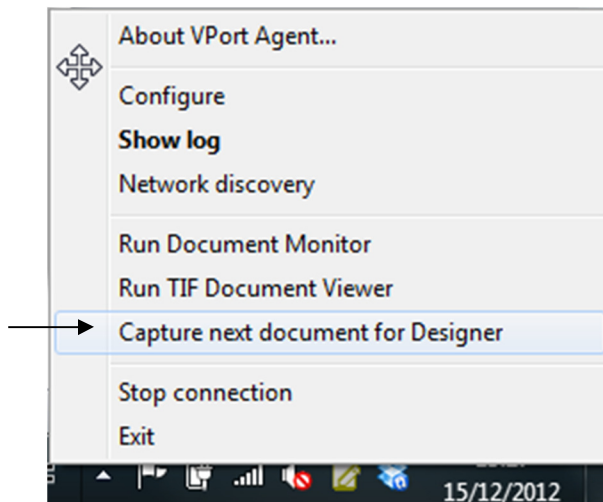


3. Select the desired resolution and paper type:



Document Capture

1. Right click VPort agent icon on the system tray:
2. choose "Capture next document to Designer".



3. Printing any document at this state to VPSign VPad printer will start the Signature Wizard for the specific document in its workspace.

The screenshot displays the 'Untitled Template - Signature Wizard Designer' application. The interface includes a menu bar (File, Tools), a toolbar with icons for file operations and zooming, and a status bar showing '1 of 1' and '100%'. A left-hand pane lists design elements: Document identification, Signature boxes, Output file name id, Data field, and Triggers. The main workspace shows a form titled 'Absence Request' with the VPSign logo at the top. The form contains the following fields and sections:

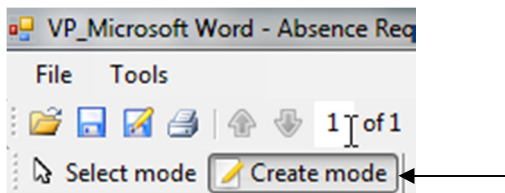
- Absence Information** (Section Header)
- Employee Name: Kevin Dan
- Employee Number: 877-2 Department: IT
- Manager: Paul Simon
- Type of Absence Requested:
 - ☐ Sick ☐ Vacation ☐ Bereavement ☐ Time Off Without Pay
 - ☐ Military ☐ Jury Duty ☐ Maternity/Paternity ☐ Other
- Dates of Absence: From: _____ To: _____
- Reason for Absence: _____
- You must submit requests for absences, other than sick leave, two days prior to the first day you will be absent.*
- Employee Signature _____ Date _____

Designing a VPSign Template

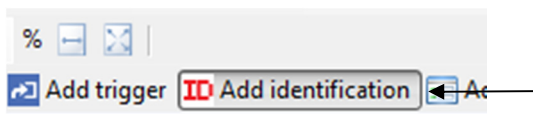
Creating Template identification

Creating the template's ID, will enable VPort agent to recognize and match all future documents printed to it, bearing the same unique ID, for processing according to this template's properties. Choosing the right unique ID for each template is there for crucial. Template ID can be created using any string in the template content or name.

1. To create a template ID using a string in the template's content, Click "**Create mode**" Button on the top toolbar.



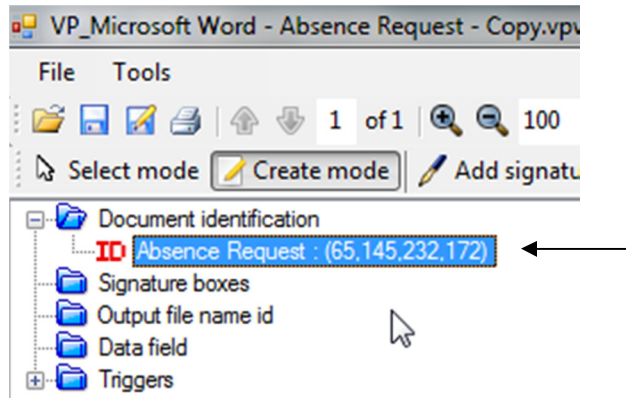
2. Click "**Add Identification**" Button on the top toolbar.



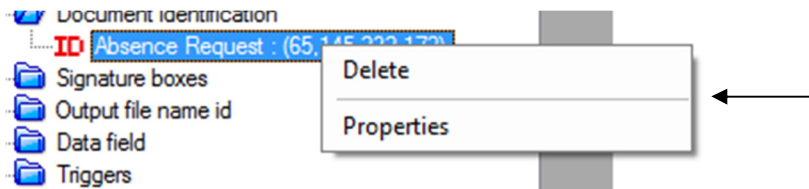
3. Choose your ID string by holding left mouse button and marking a box around it. This sample template ID is the string: "Absence Request". When done, release the mouse button.



4. The Template ID object is created in the Document identification folder, under the object browser tree on the left side.

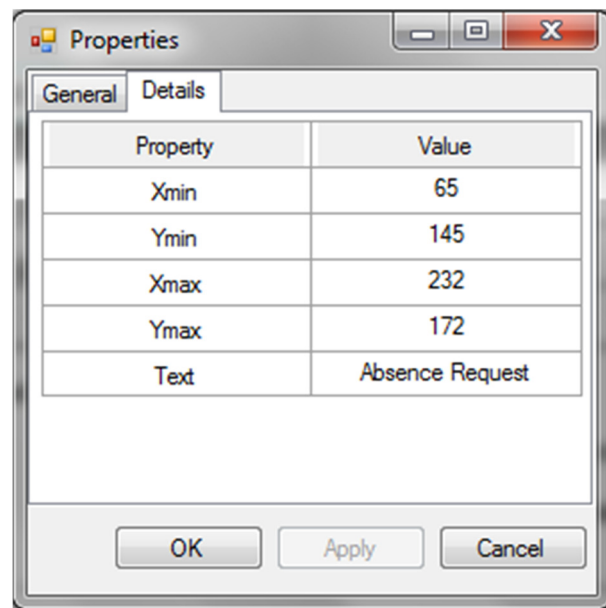
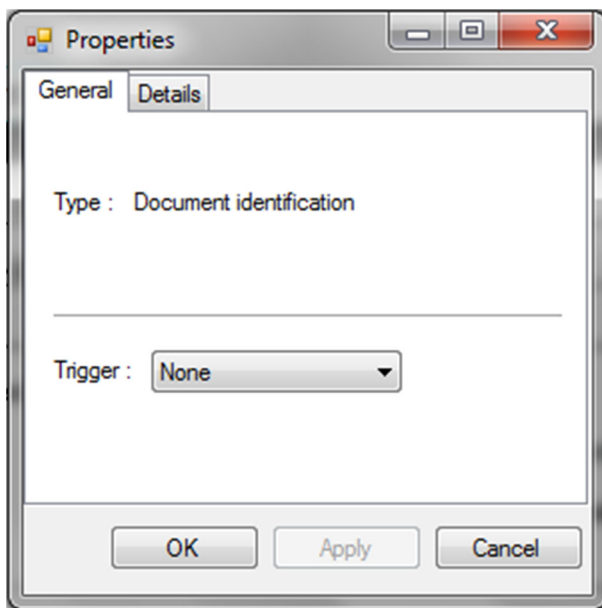


5. Right clicking the object will pop up the following window:



Choosing "Delete" will remove the object.

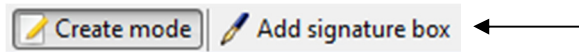
Choosing "Properties" will pop up the object properties page:



Marking Signature Boxes

Signature boxes are used to mark users required signature areas in the document. Users must sign each signature box before being able to approve the document and send it back to its originator. Signature boxes can be created with or without a signature line:

1. While in "Create mode", click the "Add signature box" button.



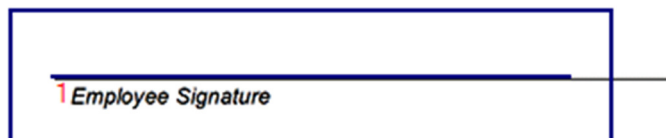
2. Choose box style (With or without a signature line) :



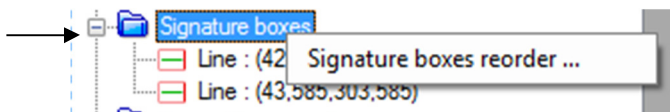
Note : this is just for convenience of use while designing the template cause on Vpad the signature box always appears with signature line.

3. Locate the planned signature area, mark a box around it by left clicking the mouse button while holding it, dragging the corner and releasing the button. This will create a dark blue box marking the signature area, bearing a serial order number. Creating more than one box in the same page, will add an ascending numbering to each box, to present its processing order. This can be changed, by reordering the boxes.

You must submit requests for absences, other tha

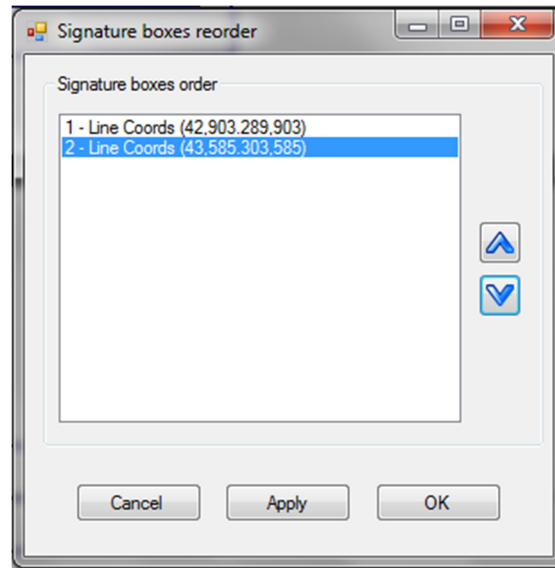


4. To reorder signature boxes in the same page, right click "Signature boxes" on the object browser and click "Signature boxes order".



Template Design

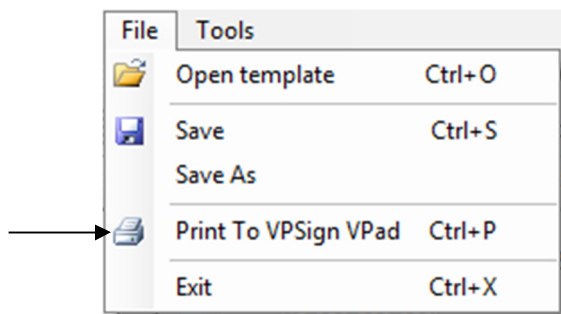
5. To reorder signature boxes in the same page, right click "Signature boxes" on the object browser and click "Signature boxes order". Choose the box you would like to reorder and use the right up and down buttons to relocate its order. Click "Apply" and "OK" buttons.



Editing signature boxes while designing

User can see the result of each/all signature box(es) while designing when working with connected Vpad.

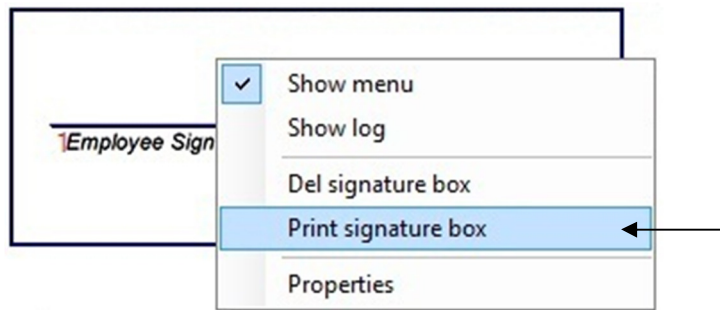
1. To print an example document with all defined signature boxes, open "File" menu then chose "Print To VPSign VPad" or alternatively click "Print To VPSign VPad" icon from upper menu pane:



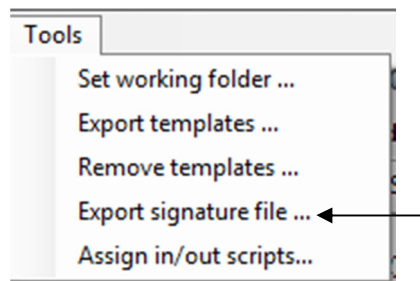
Or by using upper menu



2. To print only current signature box that is being edited, while in "Select mode", put mouse cursor inside the borders of the desired signature box then right click on the mouse, a menu will pop up, click on "Print signature box".



3. To export the signature wizard file meaning to produce a tiff file with the signature boxes defined inside that can be sent to vpad, open "Tools" menu then chose "Export signature file...".

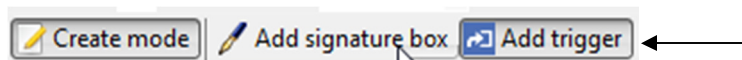


a "Save As" dialog will open, input desired file name, click on "Save" button.

Using template triggers

Triggers are used to serve as relativity "anchors" for objects positioning and detection. This feature is particularly significant while processing dynamic text layout documents, where strings of text lining vary in position depending on previous objects length. In these cases, using a unique trigger might assist in identifying the actual positioning of neighboring objects, relatively to the known trigger. For example, if we would like to mark the employee number in our sample document, and we are not sure if the line containing it would always be on the same line, we can define its left title "Employee Number:" as a trigger, and refer the actual number positioning to its trigger.

1. While in "Create mode", click the "Add trigger" button.



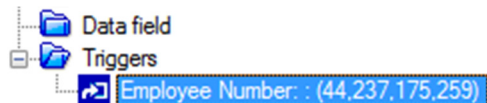
2. Locate and mark a box around the string you would like to use as a trigger, by left clicking the mouse button while holding it, dragging the corner and releasing the button. This will create a green box marking the trigger.

Employee Name: Kevin Dan

→ Employee Number: 877-2 Department: IT

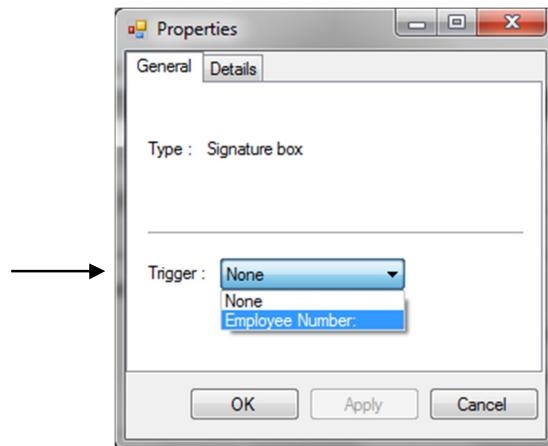
Manager: Paul Simon

A trigger object would be created in the triggers folder of the object browser:



Right clicking the object would enable you to delete it or view its properties.

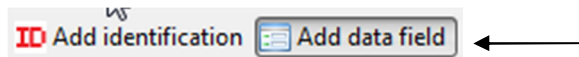
3. To refer an object to a trigger position, use the object's properties page general tab:
Note: triggers are applicable to objects of type Signature box, identification, datafield and output name identifier.



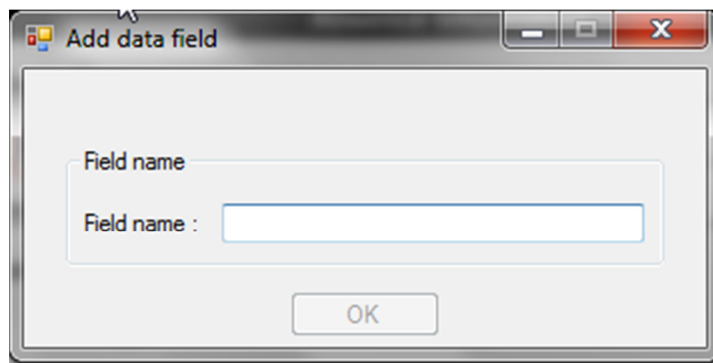
Extracting and using Data Fields

Data fields can be defined to be extracted for further use during document "printing" process. Data field can be stored at an external file, used for special additional output file naming managing which couldn't be handled by the designer, assist in output archiving and indexing and more.

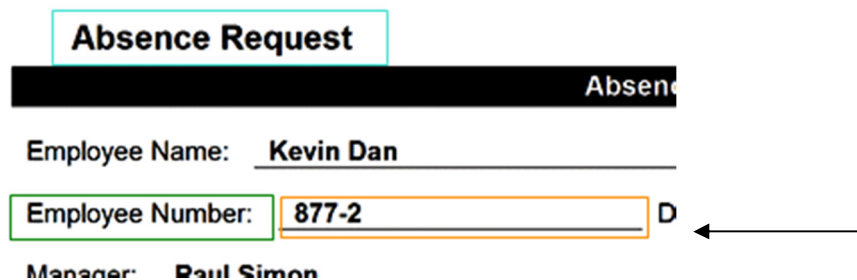
1. While in "Create mode", click the "Add data field" button.



2. Locate and mark a box around the string you would like to define as data field by left clicking the mouse button while holding it, dragging the corner and releasing the button.
3. Name the data field:



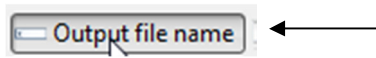
4. Clicking the "OK" button his will create an orange box marking the data field.



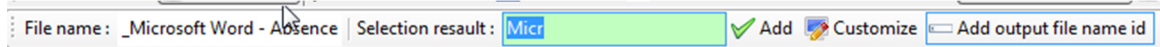
Handling output file names

Controlling output file names is an important integration tool while working with organizational systems. Signature Wizard enables setting dynamic output file names, using input file data, document data fields, prefixes and fixed strings.

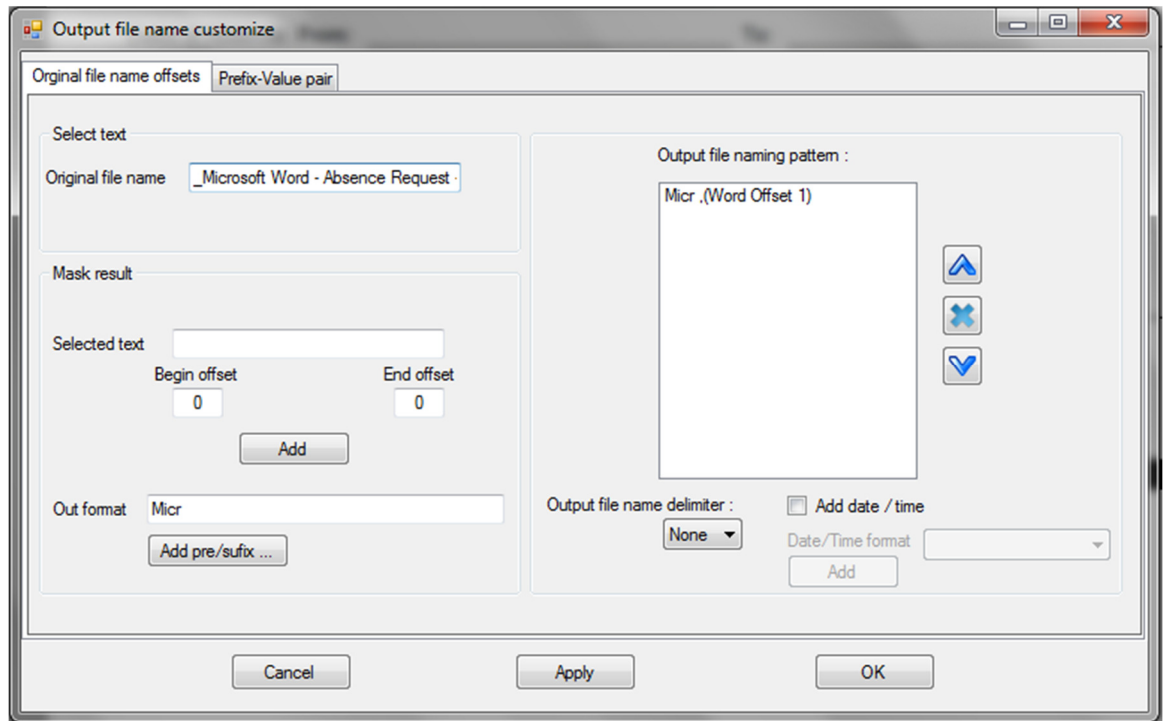
1. While in "Create mode", click the "Output file name" button.



2. The following bar will appear under the current one:

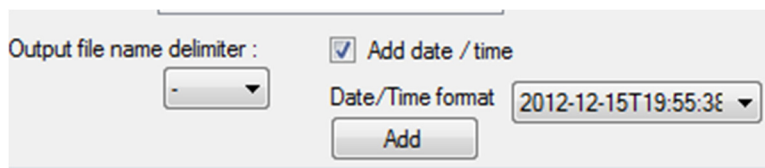


3. Mark any string combination in input file name and click the "Add" button to add the strings to output name. Click "Customize" to open output file name form:

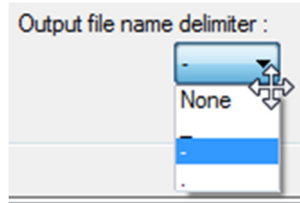


Use any right side output file naming pattern to build the output name format (Out format).

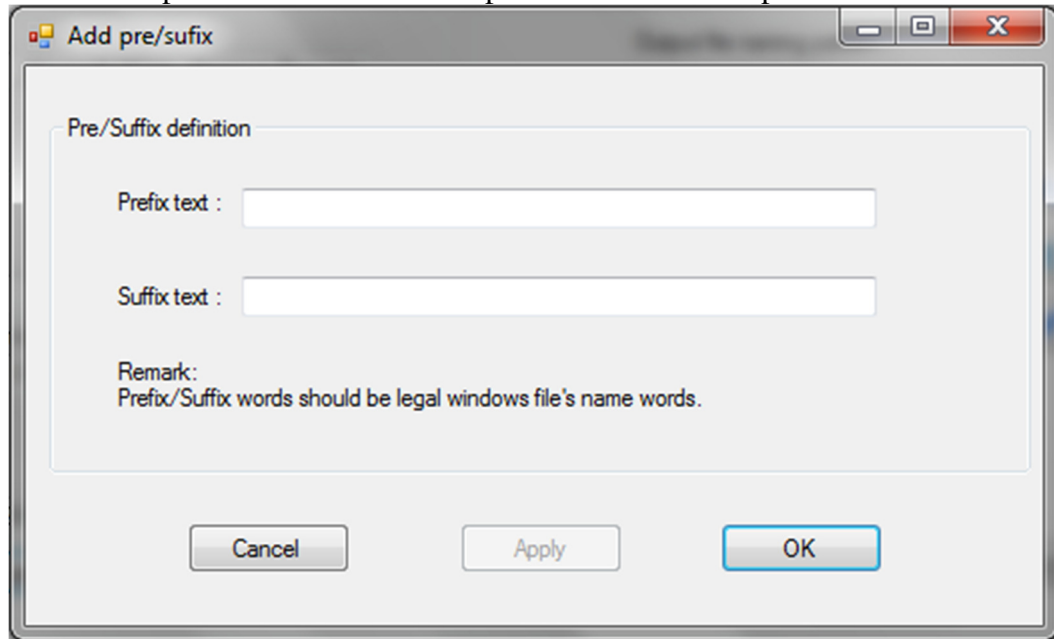
4. Check "Add date / time" checkbox to add time stamp to file name.



5. Select delimiter from delimiters list to delimit strings in file name.



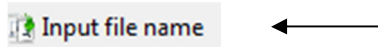
6. Click "Add pre/suffix" button to add prefix or suffix to output file name:



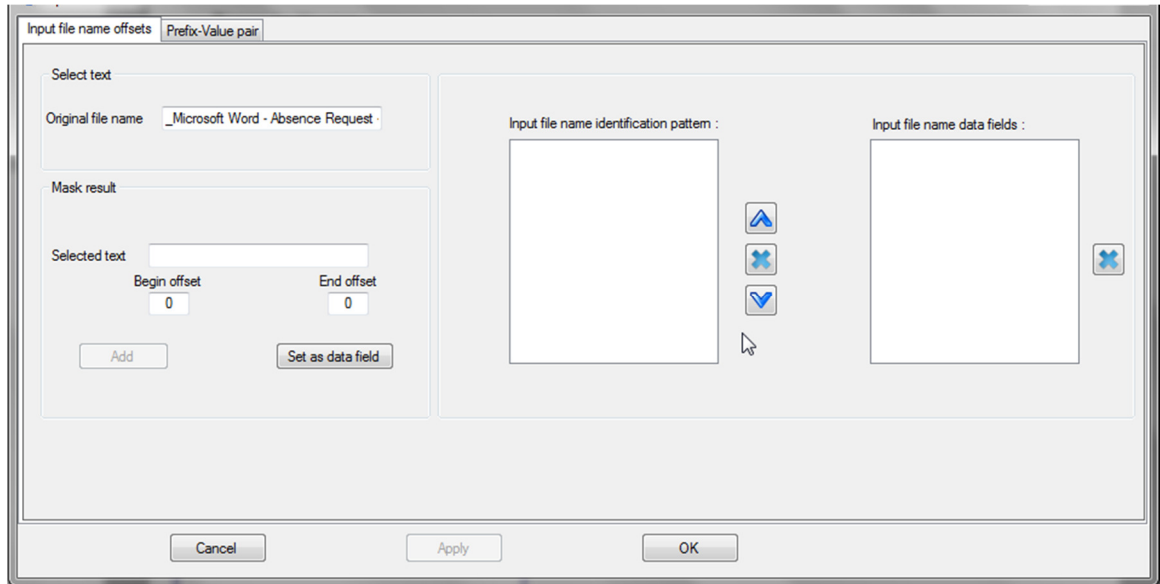
Handling input file names

Input file name data can be used both for alternative to/additional template identification and matching and/or data fields extraction from the input file name for further processing and integration.

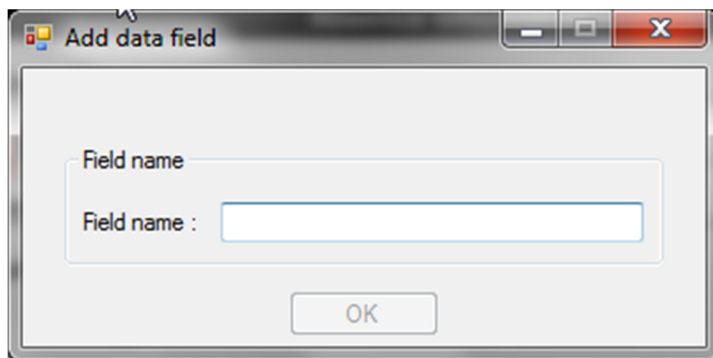
1. While in "Create mode", click the "Input file name" button.



Input file name form will open:



2. Mark any string from the input original file name into input file name identification pattern by clicking the "Add" Button.
3. Set any marked string as data field by clicking the "Set as data field" button and name it:



Input file name data can be used both for alternative to template identification and matching and/or data fields extraction from the input file name for further processing and integration.

Prefix-value pair tab

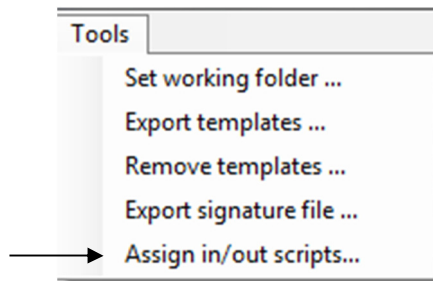
the prefix value tab allow the user to define a trigger word (hence prefix) that the identification word (hence value) comes straight after it or separated only by defined delimiter, the work flow is very similar to “Input file name offsets” tab.

Assigning before/after session script file

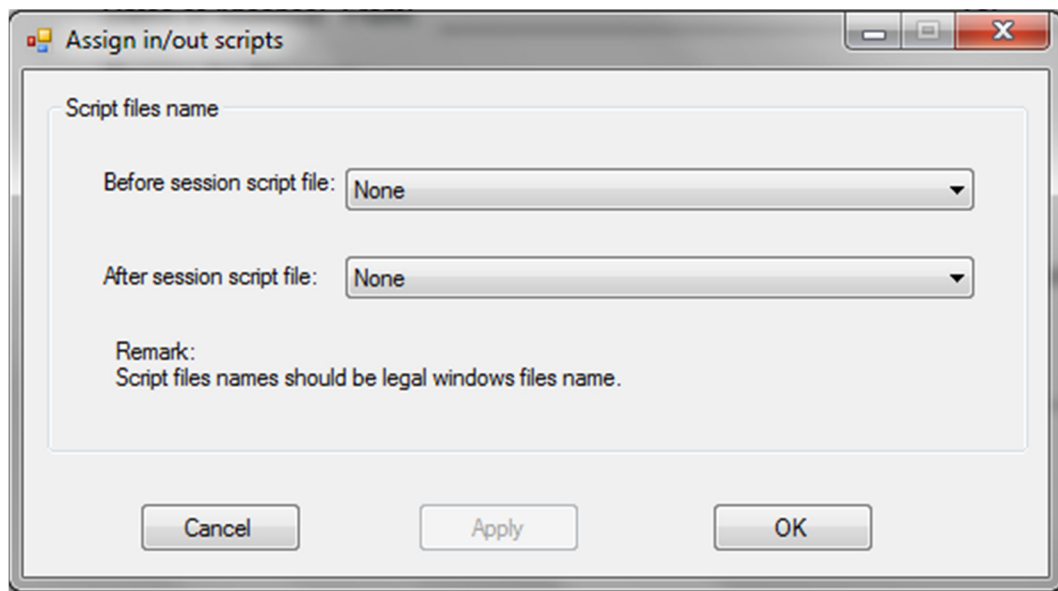
VPSign client exposes two user exit hooks for external enhancements during processing. These entry points can be used to add any pre or post session proceedings for enhancing document handling operations during its processing, according to the desired business need and demands. This is achieved using the powerful industry standard LUA scripting language, a full function widely used programming language that excels with its rich library of free functions and code.

For further knowledge please visit <http://www.lua.org/>.

1. Open “Tools” menu then chose “Assign in/out scripts...”.



2. Chose the wanted scripts to assign before/after session:



Note: the scripts are defined in predefined folder, any new scripts added by the user to that folder will appear automatically at the combo boxes above.

Managing templates

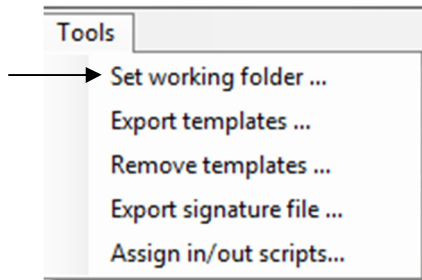
Defining working folder

A working folder need to be defined in order to save/open and export templates from the folder , the folder can be redefined and will be used also next time when working with the designer.

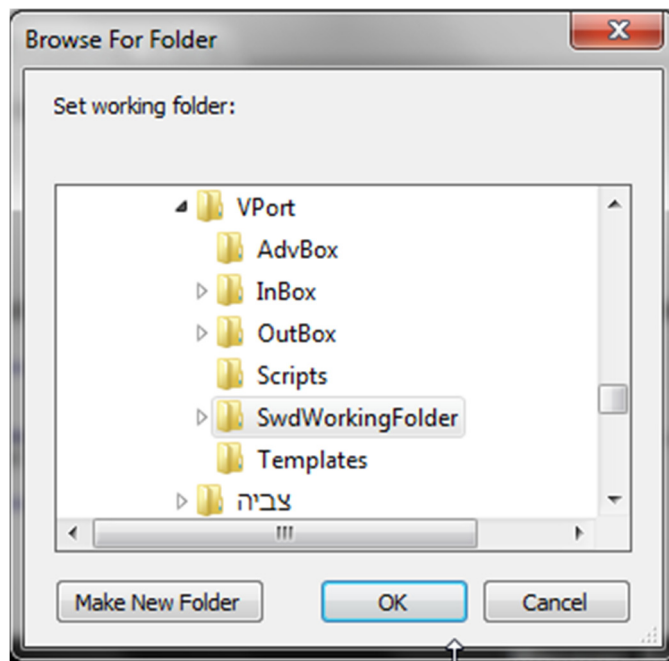
Note: a default working folder is defined at setup, if no need to change the working folder the user can skip this section and the designer will work with the default working folder named “SwdWorkingFolder”.

To define a working folder:

1. Open “Tools” menu then chose “Set working folder ...”.



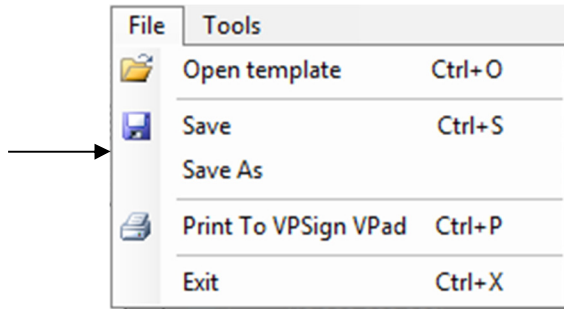
2. Browse to the wanted folder, then click “OK” button:



Save Templates

To save new template at working folder:

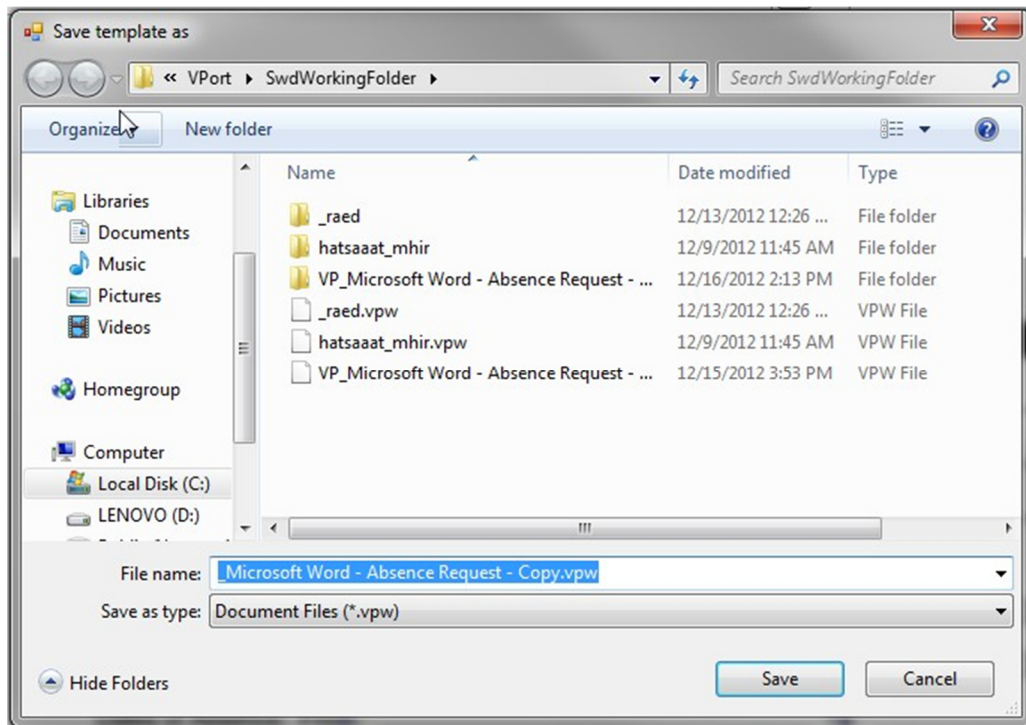
1. Open “File” menu then chose “Save As/Save” or alternatively click “Save AS/Save” icon from upper menu pane:



Or by using upper menu pane “Save” icon on the left or “Save As” icon on the right



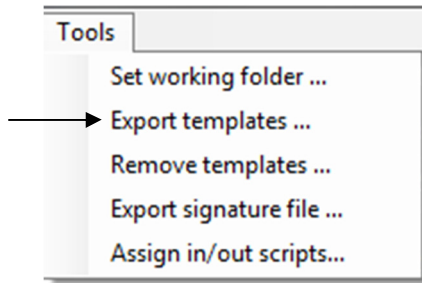
2. “Save as” dialog will open at the working folder, then chose a legal windows name and click on save button :



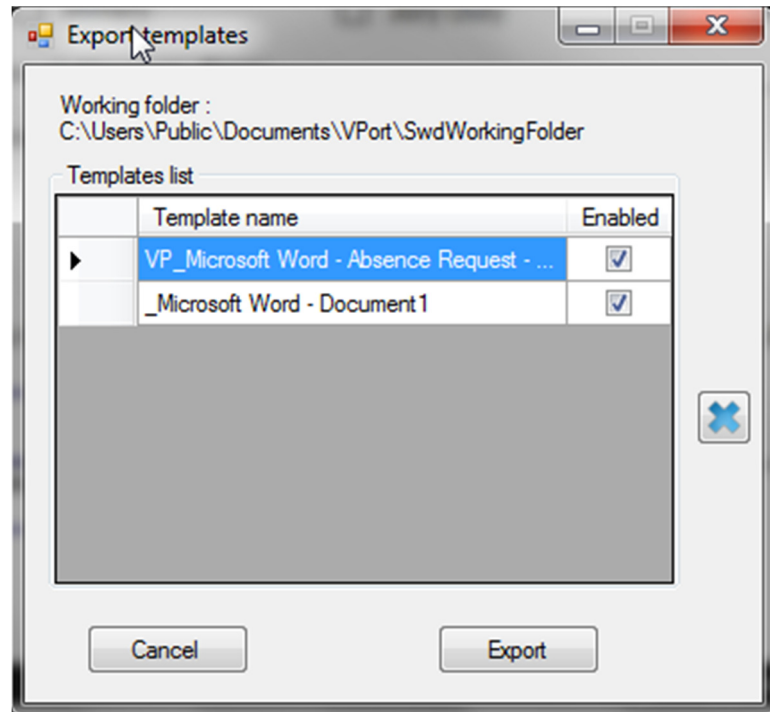
Export Templates

To export template meaning to export the templates to be used at run time:

1. Open “Tools” menu then chose “Export templates ...”.



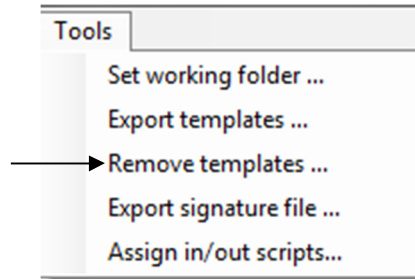
2. The following dialog will appear showing all saved templates at working folder, at default all templates are enabled and appear at the list, the user can delete or disable any unwanted template, disable using the checkbox on the right column (then the template definition will be at the xml used at run time but will be skipped) or the user can left click on mouse to pick the unwanted template (or using Ctrl + left mouse click to multi choice) then click on “X” button/press “Delete” at keyboard to remove template(s) from list therefor those templates won’t appear at all at the xml used at run time.



Remove Templates

To remove templates from the xml used at runtime:

1. Open “Tools” menu then chose “Remove templates ...”.



2. The following dialog will open with all already exported templates in the list, use the check box on the left column to mark any template to remove then click on “Remove” button.

