

*n***Sign**[®]

User Guide

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Definitions

Before you start, please review common terms which are used throughout this document when using nSign Connect.

- **nSign Connect:** Administration software installed on your PC computer to manage usage configurations and settings.
- **nSign:** Client software application (app) used on your iOS or Android tablet where you complete your forms.
- **Ambir Document Printer:** Plugin installed with nSign Connect. Allows users to send forms to nSign when in a PDF document via the print menu option.
- **Amazon Web Services:** Third party service provider for cloud connectivity.
- **Bundles:** Combination of multiple forms into one group of forms (bundle) to send to the tablet in one session.
- **Cloud/Cloud Services:** Type of connectivity used when computer and tablets are on different networks. Cloud services are not a local service (LAN/WiFi) and are facilitated through a third party, Amazon Web Services (AWS). Cloud services should be used in instances where the computer and tablets are on different networks.
- **Dashboard:** Initial screen when nSign Connect is opened and can access settings.
- **Devices:** Refers to the number of tablets activated in nSign Connect.
- **Dynamic Session:** An active session which you are performing your actions.
- **Forms:** Documents sent to the tablet from nSign Connect.
- **Fillable Fields:** Form fields are any input field you create on a PDF form. They may be a text box, check mark, radio button, etc.
- **Freestyle Form:** Forms which users will complete using a tablet stylus or their finger. Any writing on these forms are captured as a markup on the form that was sent to the nSign application.
- **LAN/WiFi:** Network connection type (hard wired or wireless) for computer to tablet. LAN/WiFi connections should only be used if your computer and tablet are on the same network.
- **Machine Code:** This is the code that is associated to your tablet. This information is collected at installation and allows nSign Connect to communicate from your computer to tablet.
- **2-D Bar Code:** Scannable code used to gather the machine code from nSign Connect.
- **S3:** Specific account needed through Amazon Web Services for cloud connections.
- **Session:** Instance or instances of sending forms to a tablet for completion and/or signing.

Symbols



Important information and/or actions must be taken. **Read all instructions.**

Passwords

The passwords for both nSign Connect and nSign application settings menus is **admin**. Note this password is all lower case.

Installation Requirements

To use nSign Connect software, you **must** have the following requirements:

- Windows 7/8/10
- Full administrative privileges for computer and network(s)
- Tablet (Android v6.0 and up and/or iOS v 10.0 and up)
- Network connection
 - **LAN/WiFi:** wired or wireless connection. Use this if your PC and tablet are connected on the same network.
 - **Cloud Services (via Amazon Web Services S3 account):** Use this if your PC and tablets are connected on various networks. See Connect via Cloud for details on setup.

Licensing

Use of nSign Connect requires a license purchased through Ambir Technology. A single license key may be used on up to 3 tablets. If you require additional tablet activations, additional license key purchase is required.

Choosing Your Connection

Before installing nSign, you need to determine which mode of connectivity you will use from your PC to tablet.

If your computer and tablet will be on the **same** network, you will want to follow the installation instructions for **LAN/Wifi Connection**. You can find these instructions [here](#).

if your computer and tablet will be on **separate** networks, you will want to follow the installation instructions for **Cloud Connection**. You can find these instructions [here](#).

LAN/WiFi Connection Installation Instructions

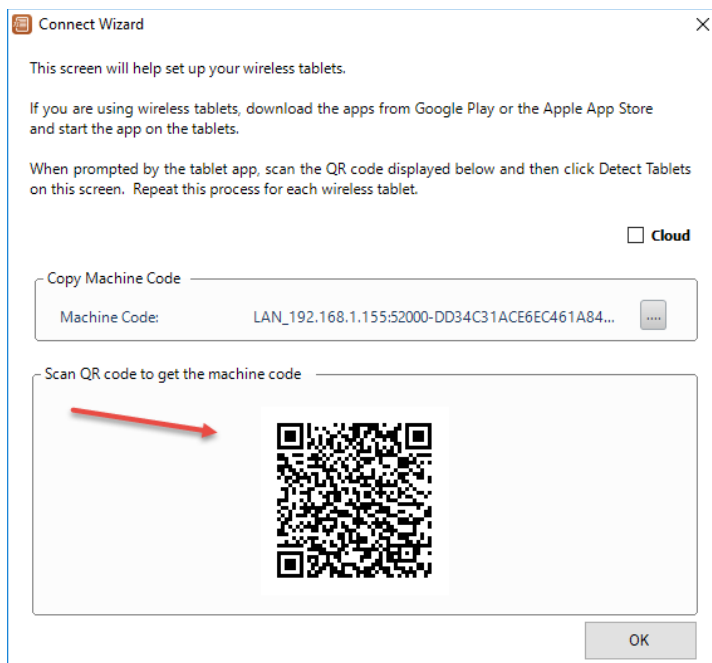
Use this connection if your computer and tablet will be on the **same** network.

Step 1: Download Software

1. **Download** the nScan Connect software from the link provided by Ambir Technology via email.
2. **Download** nSign app in iOS or Google Play stores.
3. **Install** nSign Connect on your computer. Follow the prompts through installation including the restart of your computer.
4. **Reopen** the nSign Connect application.
5. **Enter your license key** (*provided via email from Ambir Technology*) when prompted.

Step 2: Connect Your Device(s)

1. **Open** the nSign app on your tablet.
2. **Tap** the 2-D bar code icon on your tablet. This will activate your camera.
3. **Scan the 2-D bar code displayed on this screen with your tablet camera.**



4. Click **OK**.
5. nSign Connect will now open on your computer.

Step 3: Detect Tablet(s)

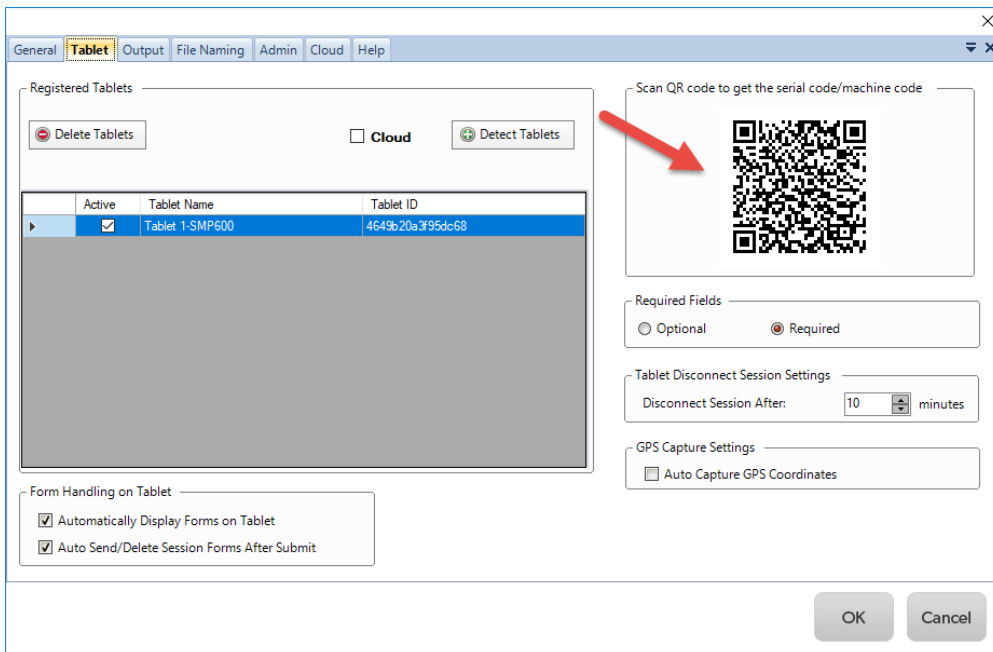
1. Click **Settings** in nSign Connect and enter the password.
2. Click the **Tablet** tab.
3. Your tablet should be displayed.
4. Click **Detect Tablets** button in nSign Connect.
6. Click **Yes** when prompted to configure your device and tablet.
7. You should now see your tablet displayed.
8. Click **OK** to exit.
9. Click **Yes** when asked if you want to clear files from the device.

⚠ If you need to move your tablet to a different LAN/WiFi network, you must unregister the tablet first. Once connected to the new LAN/WiFi network, follow Step 2 to register your tablet again.

Reconnection Instructions

If you have nSign Connect installed and need to reconnect or connect a new tablet, follow the instructions below:

1. Click **Settings** in nSign Connect and enter the password.
2. Open **nSign** on your tablet and click on the **2-D bar code**. This will activate the camera on your tablet.
3. **Scan the 2-D bar code displayed on this screen with your tablet camera.**



4. You will see a message on your tablet the device is successfully registered.
5. Click **Detect Tablets** and ensure your tablet displays.

Cloud Connection Installation Instructions

This connection is recommended for users who have computers and tablets on different networks, or who wish to utilize a cloud service rather than a local connection.

⚠ *To use nSign via Cloud connectivity, you must have an **Amazon Web Services S3** account. nSign Connect Cloud connectivity will only work via an Amazon Web Services account.*

Step 1: Set Up Amazon Web Services Account

Users must have an **Amazon Web Services S3 account** to use with nSign Connect.

If you do not have an Amazon Web Services account, [click here](#) to create an account. See details on their website for pricing information.

Once you have created your account, complete the following steps.

Step 2: Create and Name S3 Bucket

You must first create a bucket on your S3 account to use nSign Connect. This bucket is the repository that your document will upload to.

To create a bucket, complete the following steps:

1. Log into your **Amazon Web Services** dashboard.
2. Click the **v** next to **Services** on the top left of the screen.
3. Click on **S3**.
4. Click the **Create Bucket** button.
5. **Create a name** for the bucket. **See list below for naming convention rules, or visit their webpage:**
 - a. The bucket name can be between 3 and 63 characters long, and can contain only lower-case characters, numbers, periods, and dashes.
 - b. Each label in the bucket name must start with a lowercase letter or number.
 - c. The bucket name cannot contain underscores, end with a dash, have consecutive periods, or use dashes adjacent to periods.
 - d. The bucket name cannot be formatted as an IP address (198.51.100.24)
6. **Set the region as US West (Oregon)**
7. Follow the prompts to complete bucket setup.

Step 3: Generating/Locating Access Keys

nSign Connect requires entry of an Access Key and Secret Access key. Complete the following steps to obtain your access keys:

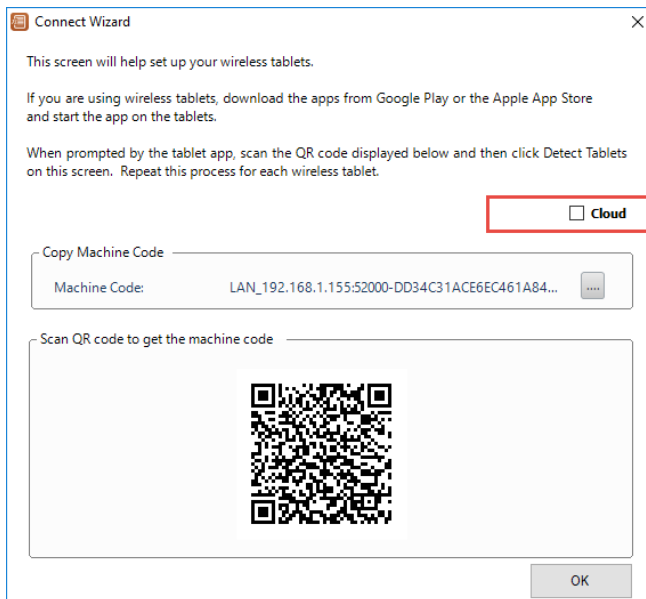
1. Log into your **Amazon Web Services** dashboard.
2. Click the **v** next to your account name in the top right of the page.
3. Click **My Security Credentials**.
4. Click the **–** next to **Access keys (access key ID and secret access key)**.
 - a. Click **Generate New Access Key**.
 - b. **Download and save the access key file that is generated.**

⚠ This file contains the Access Key and the Secret Access Key. You will **not** be able to retrieve your Secret Access key again once it's generated.

Step 4: nSign Connect Software Installation and Tablet Registration

Once you have established your cloud connectivity, install the nSign Connect software on your computer. To install nSign Connect software, follow these steps:

1. **Download** the nSign Connect software from the link provided by Ambir Technology via email.
2. **Download** nSign app in iOS or Google Play stores and open the app.
3. **Install** nSign Connect on your computer. Follow the prompts through installation including the restart of your computer.
4. **Reopen** the nSign Connect application.
5. **Enter your license key** (provided via email from Ambir Technology) when prompted.
6. **Enable Cloud** when prompted on the screen.



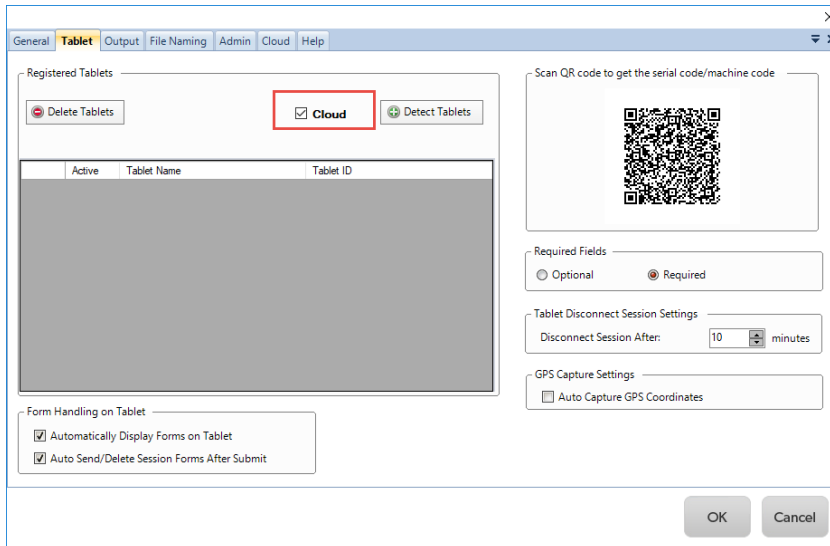
7. In the next screen, enter your **Amazon Web Services Access key, Secret Access key, and S3 Bucket name.**
8. Click **Validate.**
9. Once validated, enter your **Amazon Bucket name.**
10. Click **OK.**
11. **Tap the 2-D bar code box** on the tablet. This will activate the camera on your tablet.
12. **Scan the 2-D bar code displayed on the screen with your tablet camera.**
13. You should see an authentication completed message on your tablet.
14. Click **OK** on the computer to exit the registration.
15. nSign Connect will open. You are now ready to use nSign Connect.

Reconnection Instructions

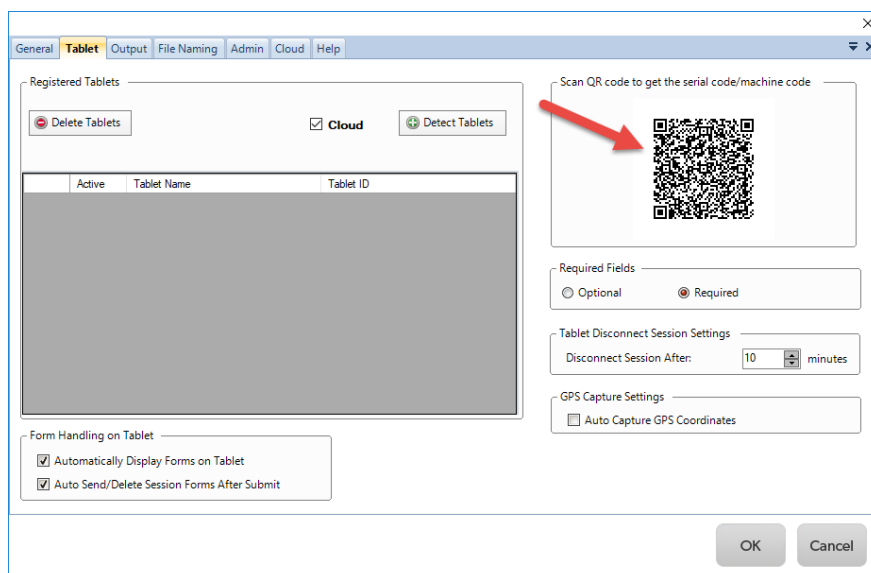
If you have nSign Connect installed and need to reconnect or connect a new tablet using the Cloud, refer to the following instructions:

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1. Click **Settings** in nSign Connect and enter the password.
2. Click the **Tablet** tab.
3. Select the **Cloud** option (in red box).



4. In the next screen, enter your **Amazon Web Services Access key, Secret Access key, and S3 Bucket name.**
5. Click **Validate.**
6. Once validated, enter your **Amazon Bucket name.**
7. Click **OK.**
8. **Tap the 2-D bar code box on the tablet.** This will activate the camera on your tablet.
9. **Scan the 2-D BAR code displayed on the screen with your tablet camera.**



10. You should see an authentication completed message on your tablet.
11. Click **Detect Tablet.** Your tablet should now display in the list.

Form Types

There are two classifications of forms when using nSign Connect: freestyle forms and fillable forms.

Freestyle Forms

These are forms which users will complete using a tablet stylus or their finger. Any writing on these forms are captured as a markup on the form that was sent to the nSign application.

Fillable Forms

These forms use fillable fields which are created on a PDF for use. When users complete these fields, they will be entering information with the tablet keyboard.

Fillable fields are fields which are configured to identify repetitive keywords on a form. For example, forms which require first and last names can be configured to autofill the first and last name after the initial data entry. nSign Connect works with PDF formatted documents. Users may use existing PDFs or create custom Forms.

To create Form Fields, you must have a **PDF creator** software installed on your computer. If you do not have a PDF software installed, Ambir Technology offers a 45-day free trial of Nuance Power PDF software. Visit www.ambir.com/power-pdf/ for more information and download instructions.

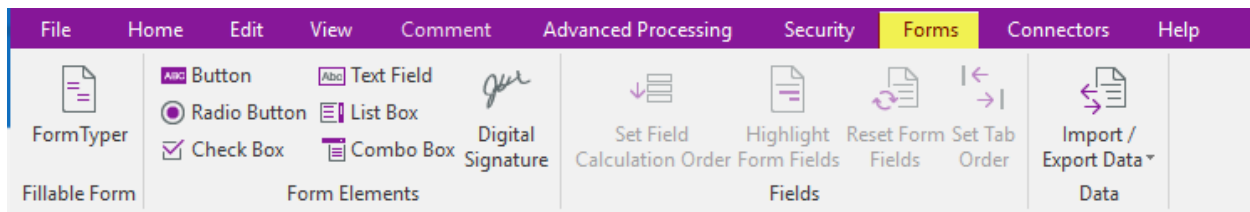
Converting Files - Preferred Format

The preferred format for files to be converted into usable fillable field files for nSign Connect is Microsoft Word. Word source files allow for editing that may need to occur to keep formatting.

Converting a File into A Fillable Form

The below screenshot shows the Forms menu of Nuance Power PDF Standard.

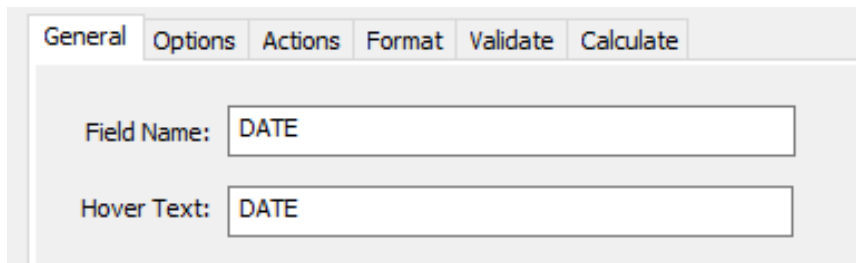
To create a fillable form in Nuance Power PDF, select the **Forms** tab as seen in the screenshot below:



Nuance Power PDF can auto-fill a document with form fields using the **Form Type**. When using this method, it is necessary to review the document to ensure the correct fields were placed.

Fillable Field Names

When creating fillable fields, there are **Field Names** and **Hover Text** labels for each individual field.



The screenshot shows a configuration window with tabs for General, Options, Actions, Format, Validate, and Calculate. Under the General tab, there are two input fields: "Field Name:" and "Hover Text:", both containing the text "DATE".

Two fields within the same document that share the same **Field Name** will display identical information.

To ensure that the information is the same in both locations, **Field Names** must be spelled, capitalized, and punctuated the **exact** same way.



Both fields with the **Hover Text** "DATE" were written with the **Field Name** "DATE," as seen in the first image.

Circled Form Areas

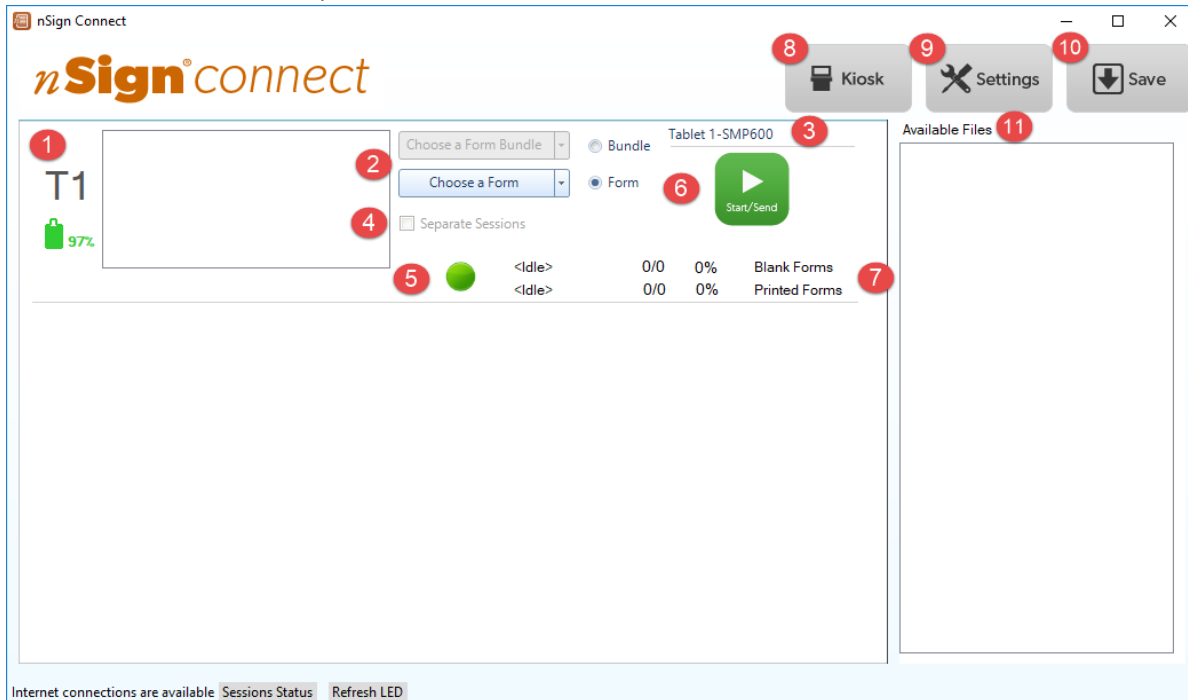
Ambir recommends **stylus only tablets** for forms requiring a circled response. If you do not have a stylus for your tablet, we recommend reformatting your form to use an alternative selection option, such as a check box or radio button.

To change the option: In MS Word, navigate to the **Developer** tab and add the alternative selection option (check box, radio button, etc.) in front of the area you want to capture. The selection option chosen serves as a marker for a fillable check box field to be assigned there.

nSign Connect – Features

Dashboard

Below is a screenshot of the default features in the Dashboard when **nSign Connect** software is opened. Please see the number sequence to find out more information on the various functionalities.

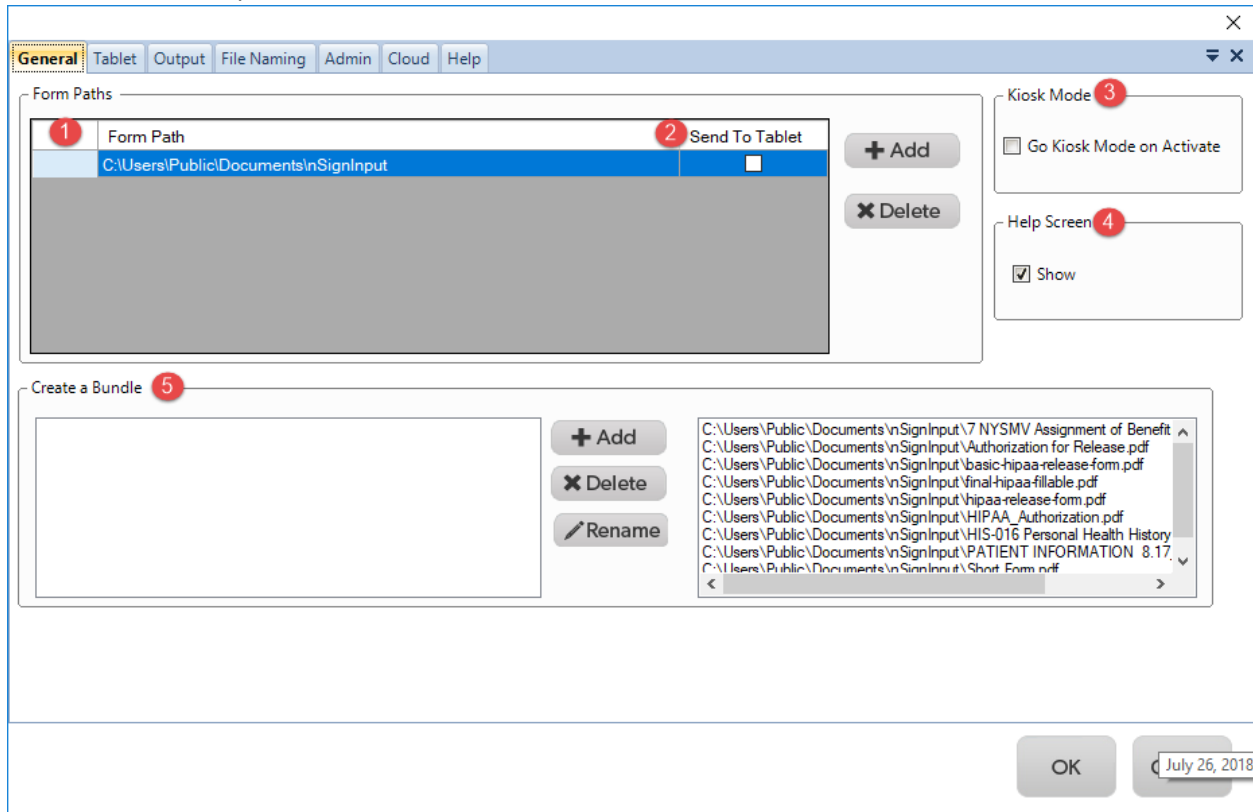


1. **Tablet Number:** All registered tablets are given a number in sequence. In this picture, we are connected to Tablet 1 (T1). For multiple tablet connections, you will see T2, T3, etc. next to the corresponding tablet.
2. **Bundle/Form Selection:** The default setting for nSign Connect is Choose a Form. Clicking the down arrow on the right of the button will display your available forms to sign.
3. **Tablet Name:** Displays the name of the connected tablet.
4. **Separate Sessions:** This option will separate each document into its own session when sending multiple forms to the tablet.
5. **LED Indicator:** Online/offline status of the tablet. A **green LED** indicates the tablet is online, and a **red LED** indicates the tablet is offline.
6. **Start/Send:** After selecting your bundle and/or form(s), click the **green Start/Send** button to send the form to the tablet.
7. **Idle Statuses**
 - a. **Blank Forms:** Status of forms being sent from nSign Connect.
 - b. **Printed Forms:** Status of forms being sent from the Ambir Document Printer.
8. **Kiosk:** This button minimizes nSign Connect to your System Tray.
9. **Settings:** This button launches the Settings options for nSign Connect.
10. **Save:** Use this button to manually save your documents after signing from the tablet.
11. **Available Files:** Files printed via the Ambir Document Printer and files placed in the Watch Folder are displayed here to select and send to a tablet. This window is displayed when Batch Print is enabled on the Admin tab (default setting).

nSign Connect - Settings

General Tab

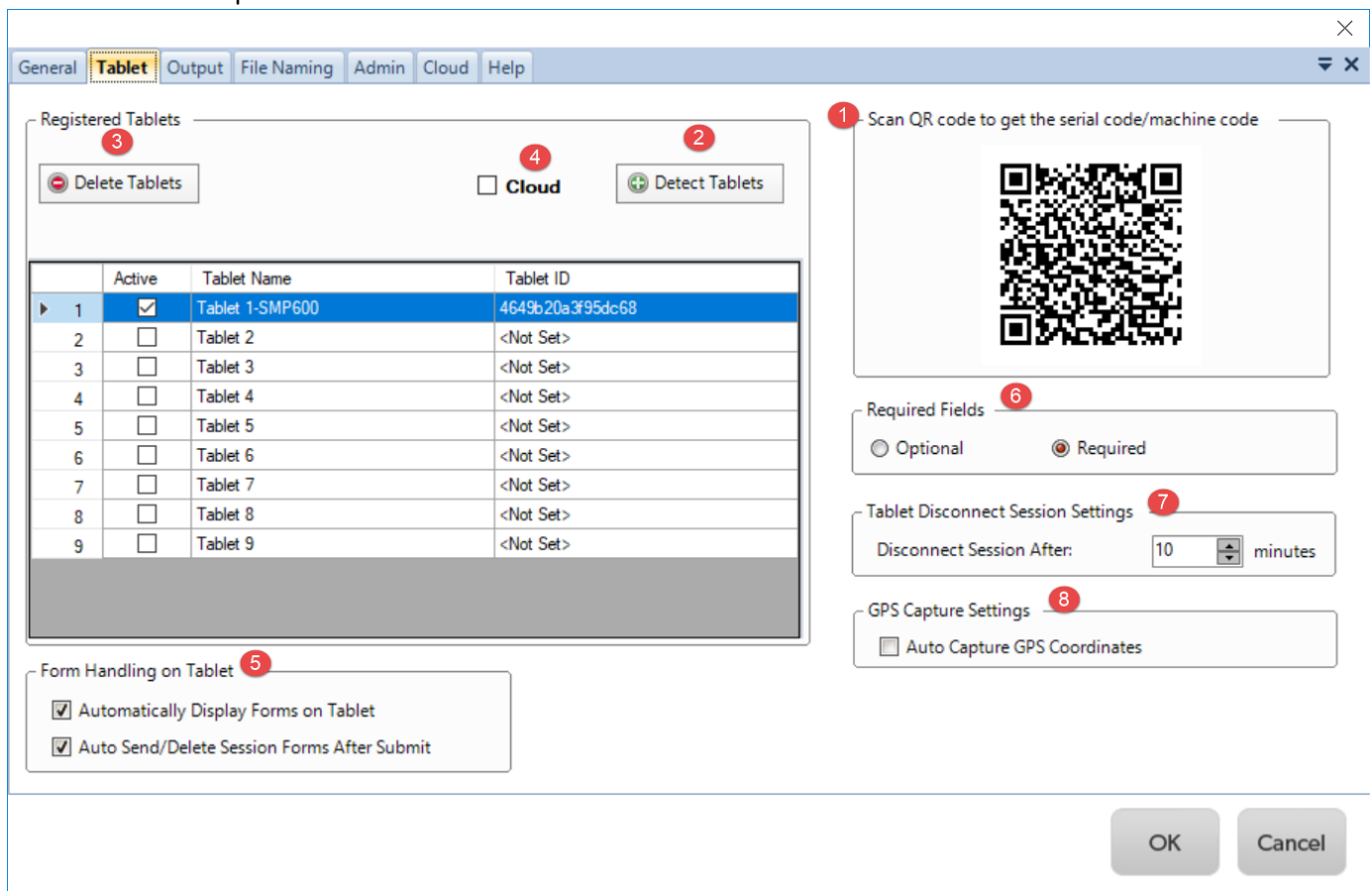
Below is a screenshot of the default features in the General tab in the Settings of nSign Connect. Please see the number sequence to find out more information on the various functionalities.



1. **Form Path:** The default save path for saved forms. To change the save path location, click the Add button and select your new location.
2. **Send to Tablet:** When selected, forms in this folder will be sent to all connected tablets so you can initiate a session with these forms or bundles.
3. **Kiosk Mode:** When selected, nSign Connect will run minimized in your computer's System Tray.
4. **Help Screen:** If left selected, the initial demo video will launch each time you open nSign on your tablet. Uncheck this box if you do not wish this to display at each startup.
5. **Create a Bundle:** Use this feature if you have multiple forms you wish to bundle together to send as one to your tablet.

Tablet Tab

Below is a screenshot of the default features in the **General tab** in the Settings of nSign Connect. Please see the number sequence to find out more information on the various functionalities.



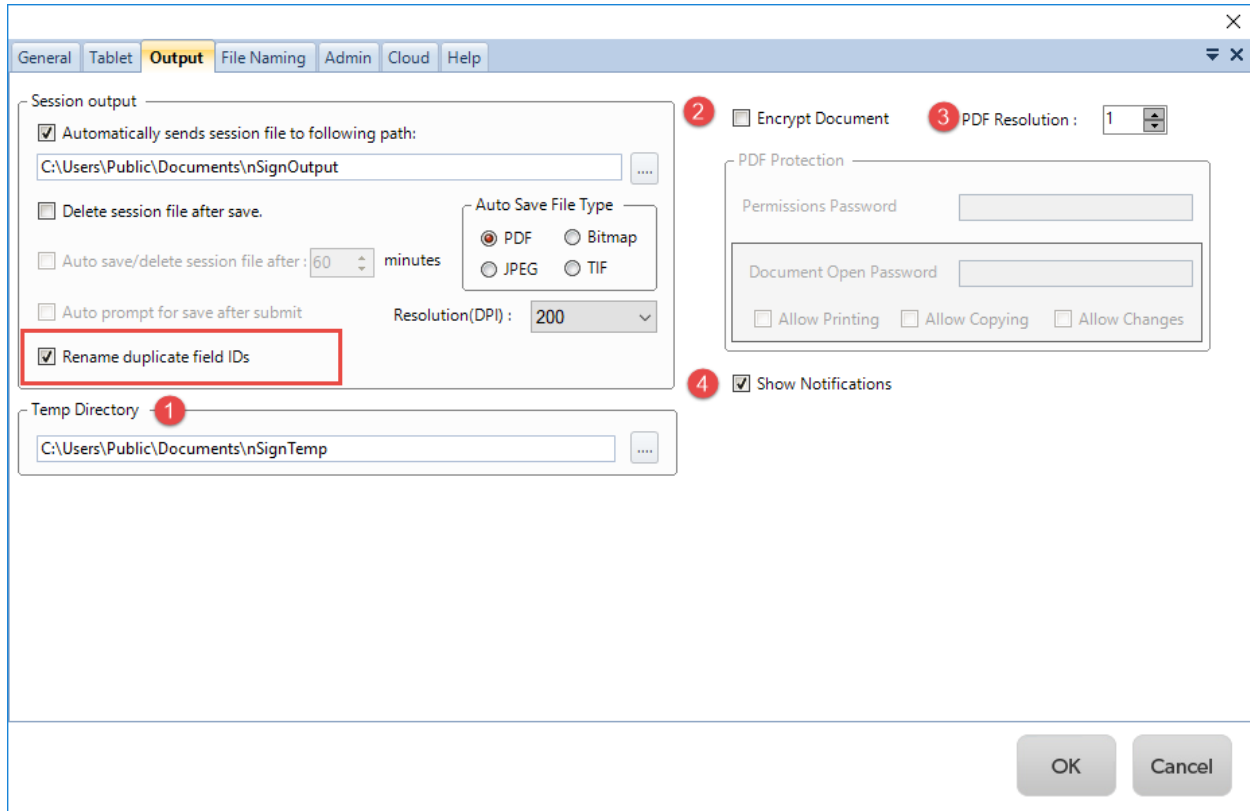
The screenshot shows the 'Tablet' tab in the nSign Connect settings. It features a 'Registered Tablets' table with columns for Active, Tablet Name, and Tablet ID. The first row is selected. To the right of the table are buttons for 'Delete Tablets', 'Cloud', and 'Detect Tablets'. Below the table is the 'Form Handling on Tablet' section with two checked options. On the right side, there are three configuration panels: 'Scan QR code to get the serial code/machine code' with a QR code, 'Required Fields' with radio buttons for 'Optional' and 'Required', 'Tablet Disconnect Session Settings' with a dropdown for 'Disconnect Session After' set to 10 minutes, and 'GPS Capture Settings' with an unchecked 'Auto Capture GPS Coordinates' option.

| | Active | Tablet Name | Tablet ID |
|---|-------------------------------------|-----------------|------------------|
| 1 | <input checked="" type="checkbox"/> | Tablet 1-SMP600 | 4649b20a3f95dc68 |
| 2 | <input type="checkbox"/> | Tablet 2 | <Not Set> |
| 3 | <input type="checkbox"/> | Tablet 3 | <Not Set> |
| 4 | <input type="checkbox"/> | Tablet 4 | <Not Set> |
| 5 | <input type="checkbox"/> | Tablet 5 | <Not Set> |
| 6 | <input type="checkbox"/> | Tablet 6 | <Not Set> |
| 7 | <input type="checkbox"/> | Tablet 7 | <Not Set> |
| 8 | <input type="checkbox"/> | Tablet 8 | <Not Set> |
| 9 | <input type="checkbox"/> | Tablet 9 | <Not Set> |

1. **Scan 2-D bar code:** Use the camera on your tablet to scan. This will pick up the nSign Connect Machine Code.
2. **Detect Tablets:** Use this button to detect tablets available on your network. Each tablet will be assigned its own line.
3. **Delete Tablets:** Delete any unwanted registered tablets.
4. **Cloud:** Check this box if your PC and tablets are connected on different networks. You must connect via Cloud. Users must have an [Amazon Web Services](#) account.
5. **Form Handling on Tablet:** The default settings will automatically display the forms on the tablet and send the session to nSign Connect after Submit. These options may be changed based on your preferences, but the defaults are recommended.
6. **Required Fields (applicable with forms with fillable fields only)**
 - a. **Optional:** If selected, the user will be prompted to complete unfilled forms and may either ignore or go back.
 - b. **Required:** If selected, the user cannot move past the page until all required fields are completed. Required fields are set within the PDF document you create.

Output Tab

The **Output tab** is where your configurations for the form type are set. This is also where you will determine the file path to save your signed documents. nSign Connect sessions may be saved in the following file formats: PDF, JPEG, TIF, and Bitmap. nSign Connect does not create Word documents. Please see the number sequence to find out more information on the various functionalities.



*Please [see table below](#) for selection options.

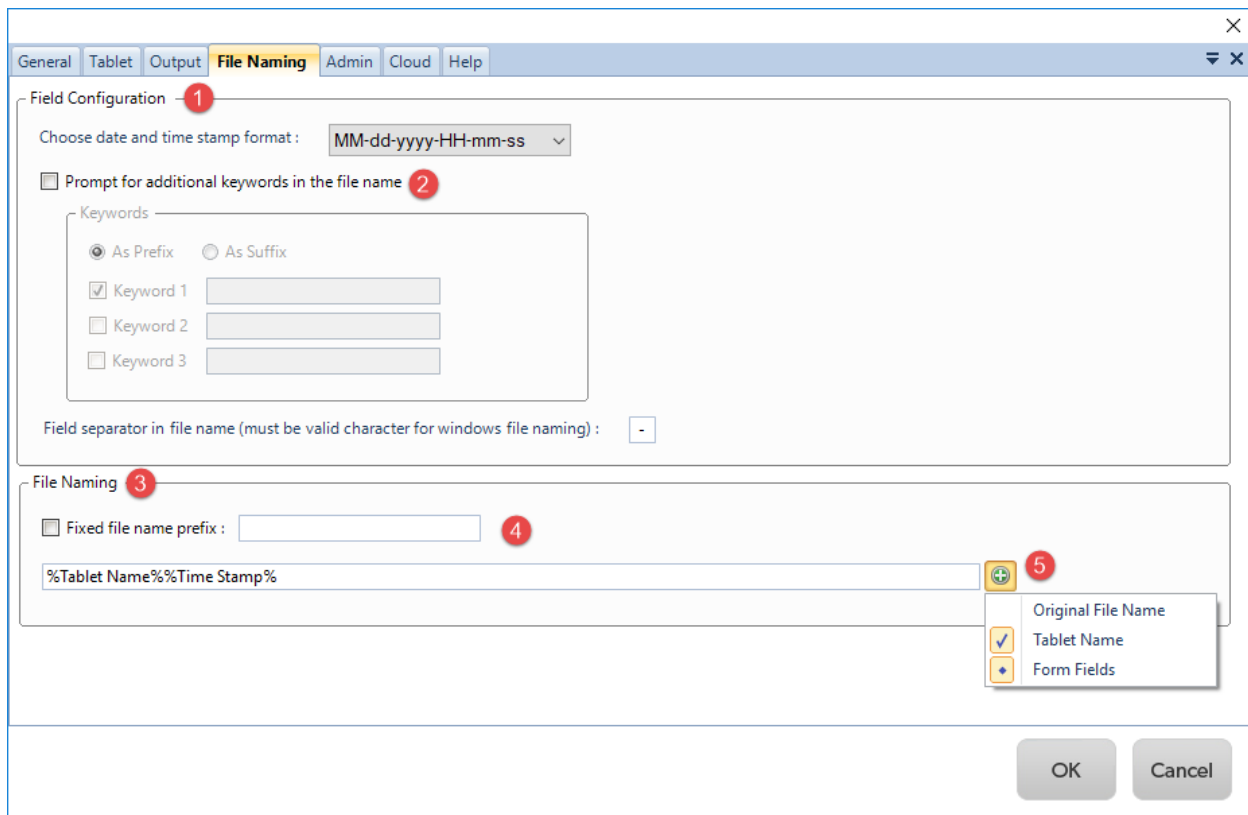
Session Output (See table for details)

| Setting Name | Description | Select If... |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Automatically sends session file to the following path | Completed forms are automatically saved to C:\Users\Public\Documents\nSignOutput (default setting and save location) | You want forms to be saved to this location and do not wish to move them. |
| Delete Session File After Save | When selected, sessions are automatically deleted from nSign Connect. | You will not be saving copies of forms to another file location and do not want to manually delete sessions. |
| Auto Save/Delete Session File After | Saves forms and sessions for a set time increment. After the time has passed, sessions will be deleted. | You will review the forms again after your session, possible to rename or save a copy to another location. |
| Auto Prompt for Save After Submit | Prompts users to name the form and set the save location manually after each session. | You want to save forms to various file locations. |
| Rename Duplicate Field IDs | Creates sequential series for duplicate keywords on bundled forms. | MUST BE ENABLED WHEN BUNDLING FORMS THAT HAVE DUPLICATE FIELD IDS. Click here for more info on fillable fields. |

1. **Temp Directory (default):** When sessions are received back from the tablet, they are encrypted and sent to the temporary file location.
2. **Encrypt Document:** When selected, the completed form will become an encrypted PDF. *It is recommended you set your own password for this functionality.*
3. **PDF Resolution:** Resolution set for electronic wet signatures on the PDF forms. The default is set to 1. This can be adjusted if needed.
4. **Show Notifications (default):** You will receive a notification via Windows in the bottom right corner of your screen after a completed form is sent back to nSign Connect.

File Naming Tab

The **File Naming Tab** is where you will configure the file naming format for completed forms. Please see the number sequence to find out more information on the various functionalities.



1. Field Configuration

- a. **Date and Time Stamp Format (default setting):** The default setting is MM-DD-YY-HH-mm-ss. You can adjust this setting using the dropdown.

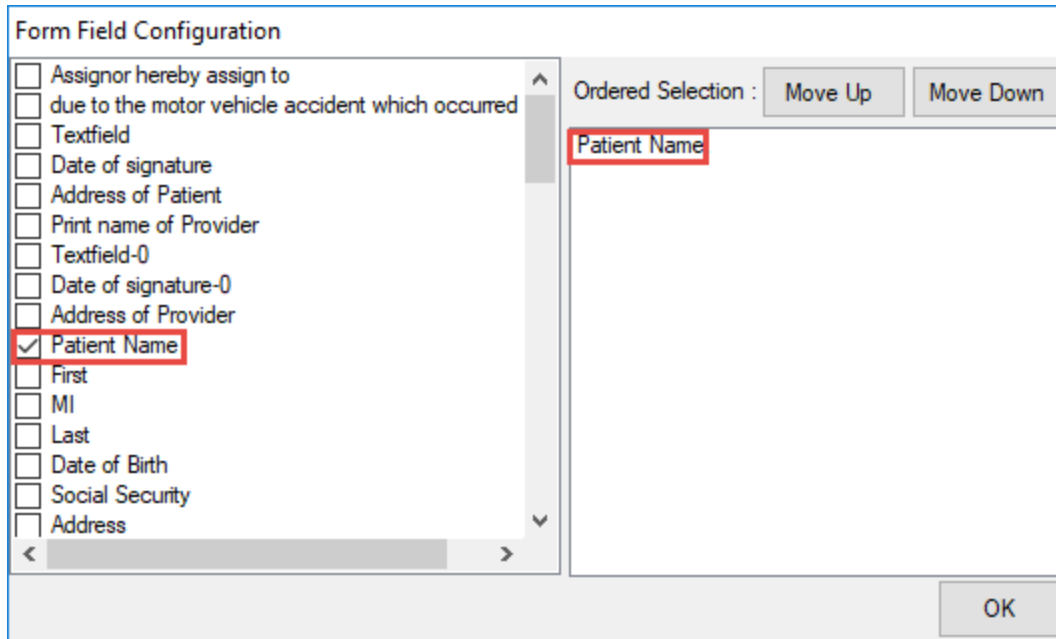
2. **Prompt to additional keywords to file name:** To use this function, you must set specific keywords as either the 'As Prefix' or 'As Suffix' to populate in the file name. You may select up to 3 keywords.

3. **File Naming:** Various options for naming files completed in nSign.

4. **Fixed file name prefix:** Select this option if you wish to have a fixed file name upon saving the completed form.

5. Additional Naming Options (+)

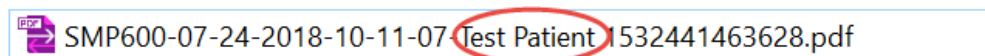
- a. File naming options are defaulted to Tablet Name and Time Stamp. You may also include **Original File Name** in the file naming string.
- b. **Form Fields:** When selected, another menu will display. You may choose Form Fields as keywords to display in your file name string. In the screenshot, you will see field Patient Name selected to display. When you save the form, this form field will display in the file name path.



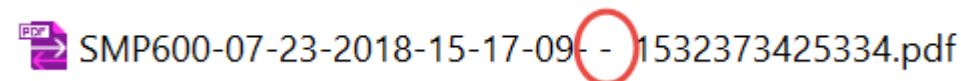
The image shows a 'Form Field Configuration' dialog box. On the left is a list of form fields with checkboxes. The 'Patient Name' checkbox is checked and highlighted with a red box. On the right, under 'Ordered Selection', the text 'Patient Name' is displayed and also highlighted with a red box. There are 'Move Up' and 'Move Down' buttons above the list, and an 'OK' button at the bottom right.

Note: If a form does **not** have a fillable form field you selected for the save path name, the saved file name area will be blank. See images below (*red circle highlights the areas*):

Fillable fields present (keyword was Patient Name):



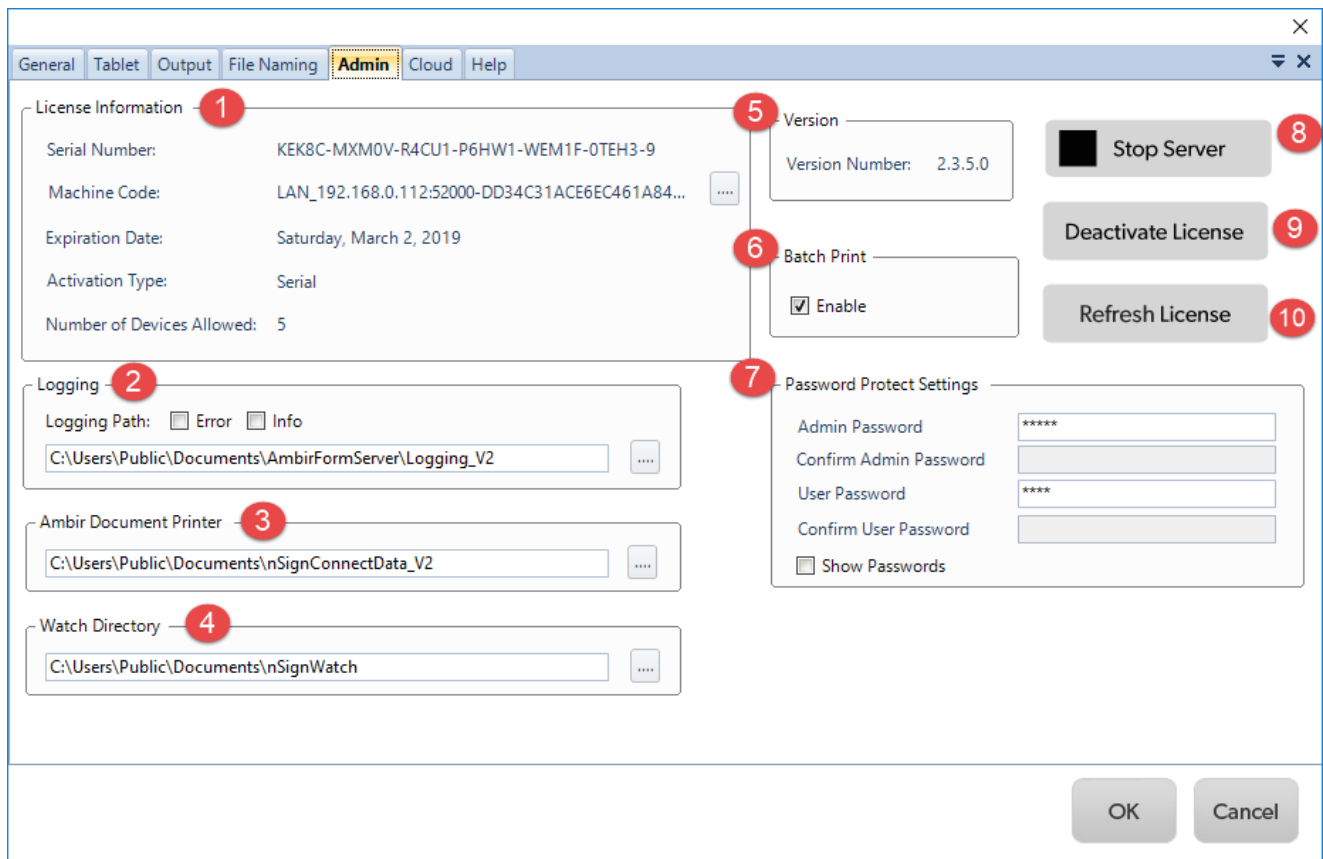
No Fillable fields present:



⚠ The 13-digit number at the end of the file name references your unique session ID in nSign. This ID populates on every saved output. This number may be removed if you chose to rename your file on save.

Admin Tab

The **Admin Tab** contains information relating to the nSign Connect administrative settings like network, license and activation information. Please see the number sequence to find out more information on the various functionalities.



The screenshot shows the 'Admin' tab in the nSign Connect application. The interface is divided into several sections, each with a numbered callout:

- 1 License Information:** Displays license details including Serial Number (KEK8C-MXM0V-R4CU1-P6HW1-WEM1F-0TEH3-9), Machine Code (LAN_192.168.0.112:52000-DD34C31ACE6EC461A84...), Expiration Date (Saturday, March 2, 2019), Activation Type (Serial), and Number of Devices Allowed (5).
- 2 Logging:** Includes a Logging Path field set to C:\Users\Public\Documents\AmbirFormServer\Logging_V2, with checkboxes for Error and Info logging.
- 3 Ambir Document Printer:** Shows the default path C:\Users\Public\Documents\nSignConnectData_V2.
- 4 Watch Directory:** Shows the default path C:\Users\Public\Documents\nSignWatch.
- 5 Version:** Displays the installed version number as 2.3.5.0.
- 6 Batch Print:** Features an 'Enable' checkbox that is currently checked.
- 7 Password Protect Settings:** Contains fields for Admin Password, Confirm Admin Password, User Password, and Confirm User Password, along with a 'Show Passwords' checkbox.
- 8 Stop Server:** A button to stop the nSign Connect server.
- 9 Deactivate License:** A button to deactivate the current license.
- 10 Refresh License:** A button to refresh the license information.

At the bottom right of the window are 'OK' and 'Cancel' buttons.

- 1. License Information:** This section contains your license key (referenced as Serial Number), key expiration date, machine code, and number of activations for nSign Connect.
- 2. Logging Path (default):** For Ambir Technical Support use only. Used to log errors you may encounter.
- 3. Ambir Document Printer (default):** C:\Users\Public\Documents\nSignConnectData_V2 is the default location for storing printer driver information for the Ambir Document Printer, which creates an Ambir Document Printer as an available printing destination within the print function of Windows applications. Do not change this location unless directed by Ambir Technical Support. See [Ambir Document Printer](#) section for more information for using this nSign Connect feature.
- 4. Watch Directory:** Forms placed in or sent by another application to the designated Watch Directory folder location are automatically sent and displayed in the Available Forms section of your nSign Connect dashboard. This is the default behavior when the Batch Print function is enabled. When Batch print is disabled, as forms are placed in the Watch Folder they are automatically sent to the T1 connected tablet. If there are two or more connected tablets available, the user is prompted in a pop-up window to select the tablet destination.
- 5. Version:** The installed version of nSign Connect.

6. **Batch Print (default):** When selected, this enables and displays an Available Forms window in the nSign Connect dashboard. This setting is used with the Watch Directory and Ambir Document Printer functions. As files are “printed” using the Ambir Document Printer, or as files are placed in the Watch Directory location, the file names are sent and displayed in the Available Forms window.

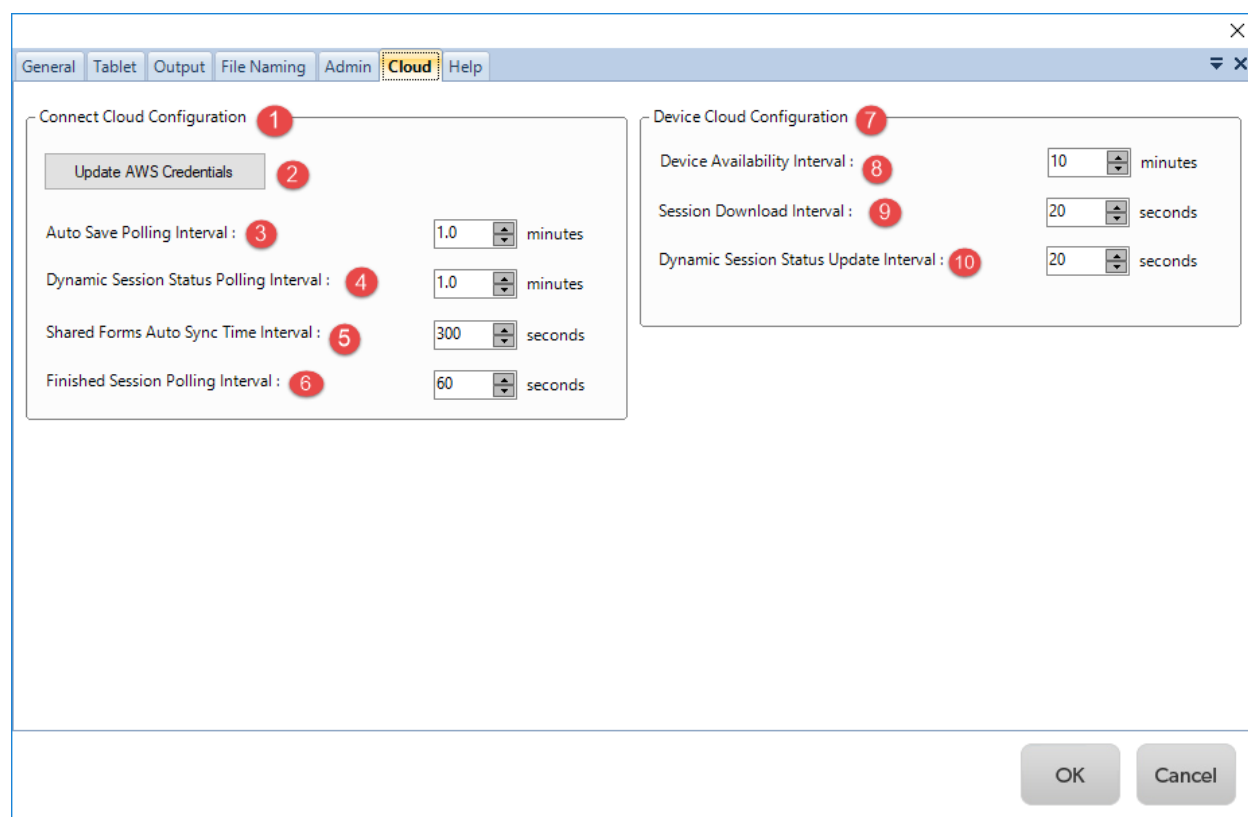
If Batch Print is disabled: Using Ambir Document Printer will send the form directly to your connected tablet.

7. **Password Protect Settings:**
 - a. The default password for Admin is **admin**.
 - b. The default password for User is **user**. **This password is for tablets only.** *You may change these passwords at any time.*
8. **Stop Server:** Quits the application.
9. **Deactivate License:** Use this functionality if you are moving nSign Connect from one PC to another and are not purchasing additional licenses. *Note: You must also deactivate the tablet from the nScan app.*
10. **Refresh License:** Use this button if you have recently renewed your license. This will check the nSign server for your updated license status.

Cloud Tab

This tab contains the settings for those using the Cloud connectivity feature of nSign Connect. Please see the number sequence to find out more information on the various functionalities.

! Once you connect via Cloud, all registered tablets used via LAN/Wifi connection are cleared from nSign Connect and must be re-registered. See [Register Your Tablet](#) for instructions.



1. **Connect Cloud Configuration (default):** This section contains settings pertaining to polling and syncing frequencies. If Cloud is selected on the Tablet tab of nSign Connect, you can edit these settings.
2. **Update AWS Credentials:** Area to update your AWS secret access keys, if needed.
3. **Auto Save Polling Interval:** Time interval in which nScan Connect polls the AWS S3 bucket for submitted offline sessions to auto save. This is a performance setting and may be adjusted according to your needs. For instance, users may wish to decrease this interval who work in high volume, fast paced offices (ex: patient registration). *Note that polling intervals to AWS count as transactions and may result in charges based on your account type.*
4. **Dynamic Session Status Polling Interval:** Polling time which nScan Connect polls AWS to determine status of a session sent to the tablet from nScan Connect.
5. **Shared Forms Auto Sync Time Interval:** Interval nScan Connect polls AWS S3 bucket to determine if any blank forms may have changed and should updated to the tablet.
6. **Finished Session Polling Interval:** Time interval nScan Connect polls AWS S3 bucket for submitted sessions. If new sessions are found, they are downloaded from S3.

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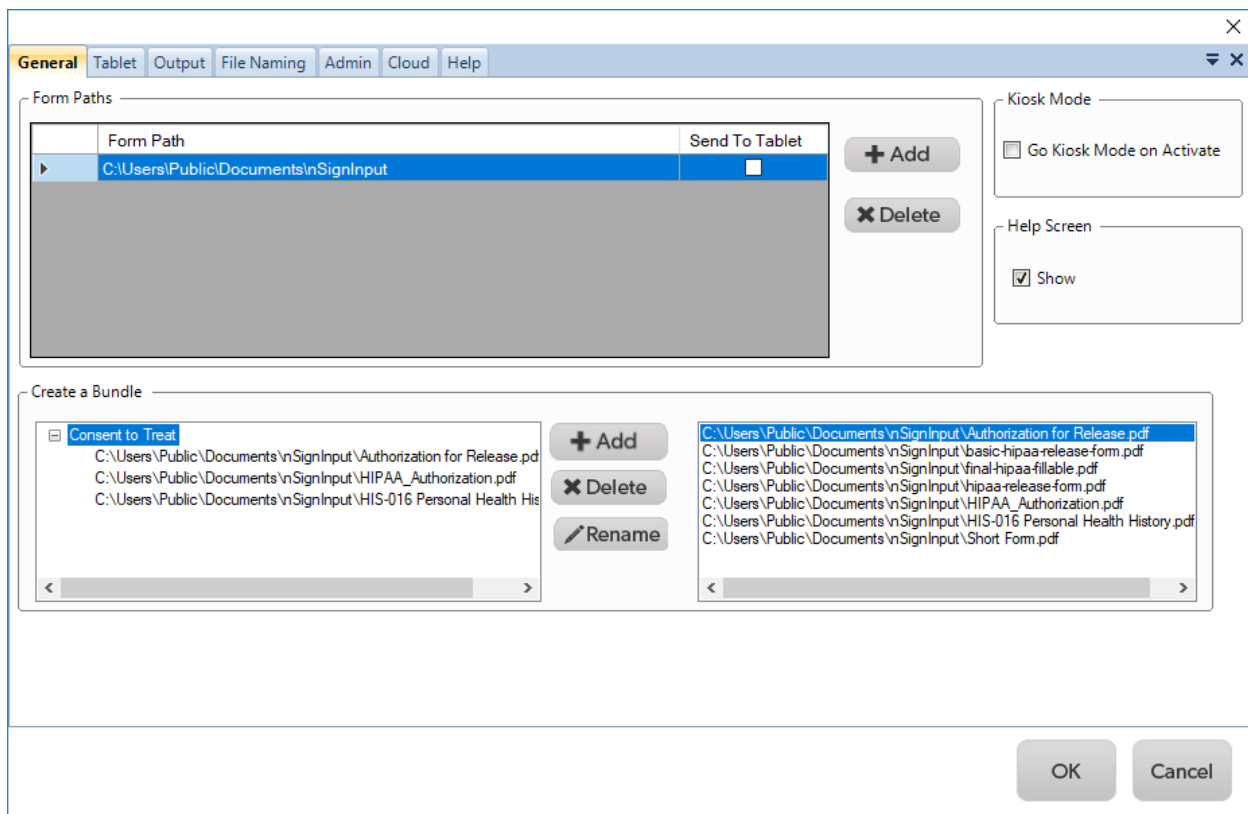
7. **Device Cloud Configuration (default):** Configure the specifications of your cloud connections.
8. **Device Availability Interval:** Time interval which the tablet reports its online.
9. **Session Download Interval:** Time interval which nSign application polls S3 bucket for new sessions sent from nSign Connect to be downloaded.
10. **Dynamic Session Status Update Interval:** Time interval in which the tablet sends status update information on sessions sent from nScan Connect.

Creating a Bundle

On the nSign Connect dashboard, you will see a radio button for **Bundle**. This option allows you to group several form types together that will be sent to the tablet.

To create a Bundle, follow the steps below:

1. **Save** your form into your **Form Path** folder. The default path is C:\ProgramData\nSignConnect
If you changed the folder location, select the appropriate file path.
2. From the dashboard, click the **Settings** button and enter your password.
3. Click the **Add** button in the **Create a Bundle** section.
4. **Name** your bundle.
5. **Drag and drop** the form name in the window selection on to the **Bundle** name.
6. You will now see a + next to your Bundle name.
7. Click the + to view all documents in your Bundle.



Sending Forms and Bundles to nSign

To begin completing your Form, you must send the Form or Bundle from nSign Connect to the connected tablet. Once sent, the Form or Bundle will display within the nSign application on your tablet.

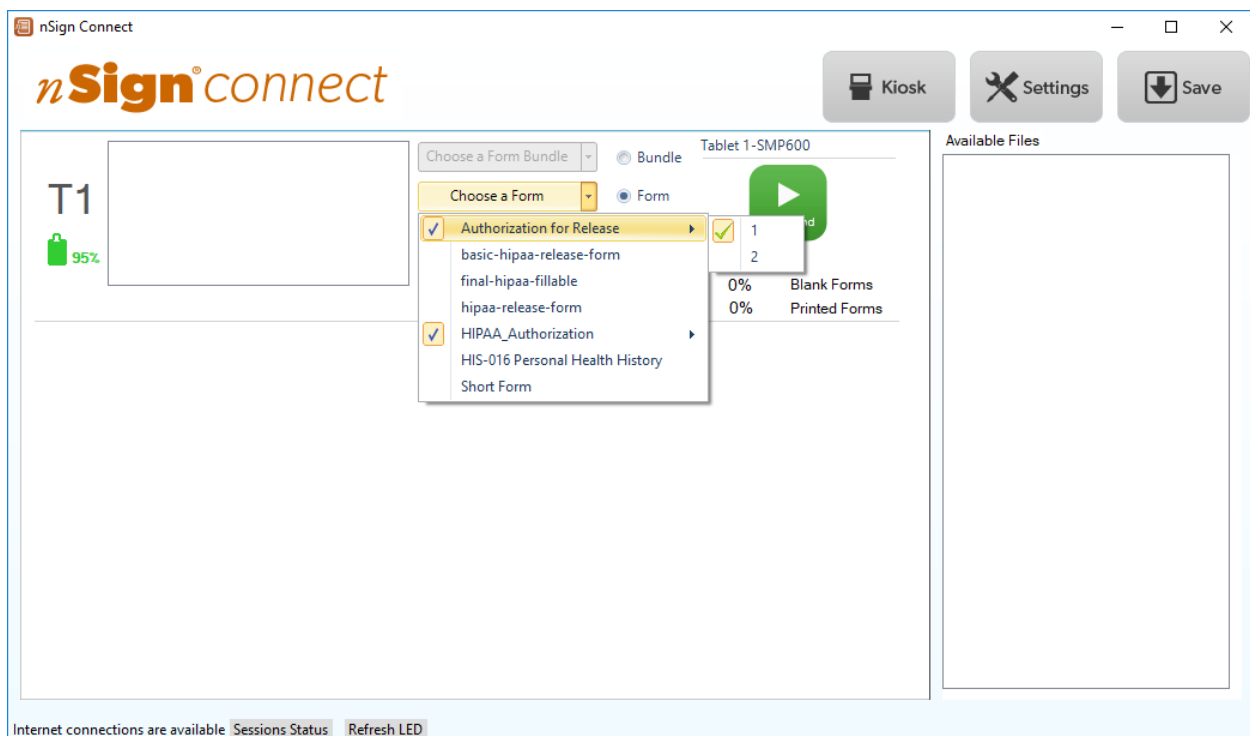
Single Form

Users may send a single form to their nSign application on the tablet. To do so, click the **down arrow** to the right of the **Choose a Form** button. All available Forms will be displayed. Click on the Form you wish to send to the tablet and click the **green Start/Send** button.

Multiple Forms

If sending multiple Forms to the tablet, you can choose the order in which they appear by hovering over the arrow to the right of the Form name and moving the check mark.

In the example below, Authorization for Release will appear first and HIPAA_Authorization will be second.

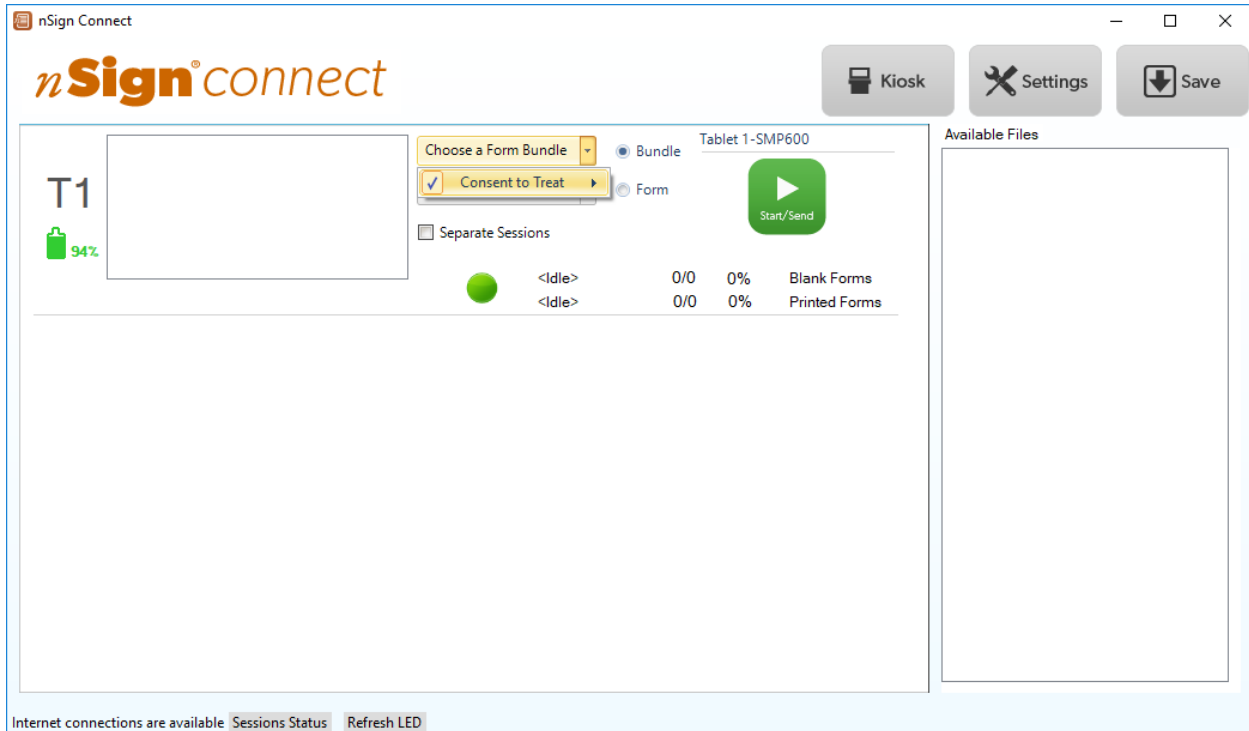


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Sending a Bundle

To send a Bundle to nSign, select the radio button next to **‘Choose a Form Bundle’**. Once selected, click the **down arrow** next to ‘Choose a Form Bundle’ to display your existing Bundles, and select one or more bundles to send to the tablet.

In the screenshot below, Consent Bundle is available to send. Once selected, click the **green Start/Send** button.

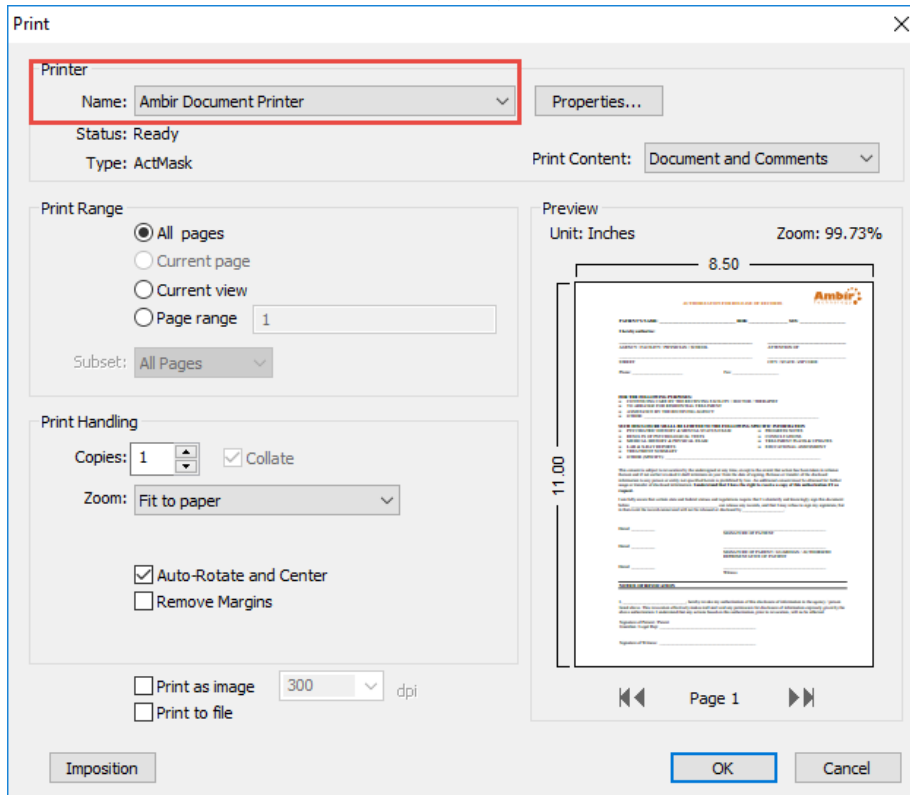


Ambir Document Printer

The **Ambir Document Printer** is a printer destination option within the print function of any application on your computer.

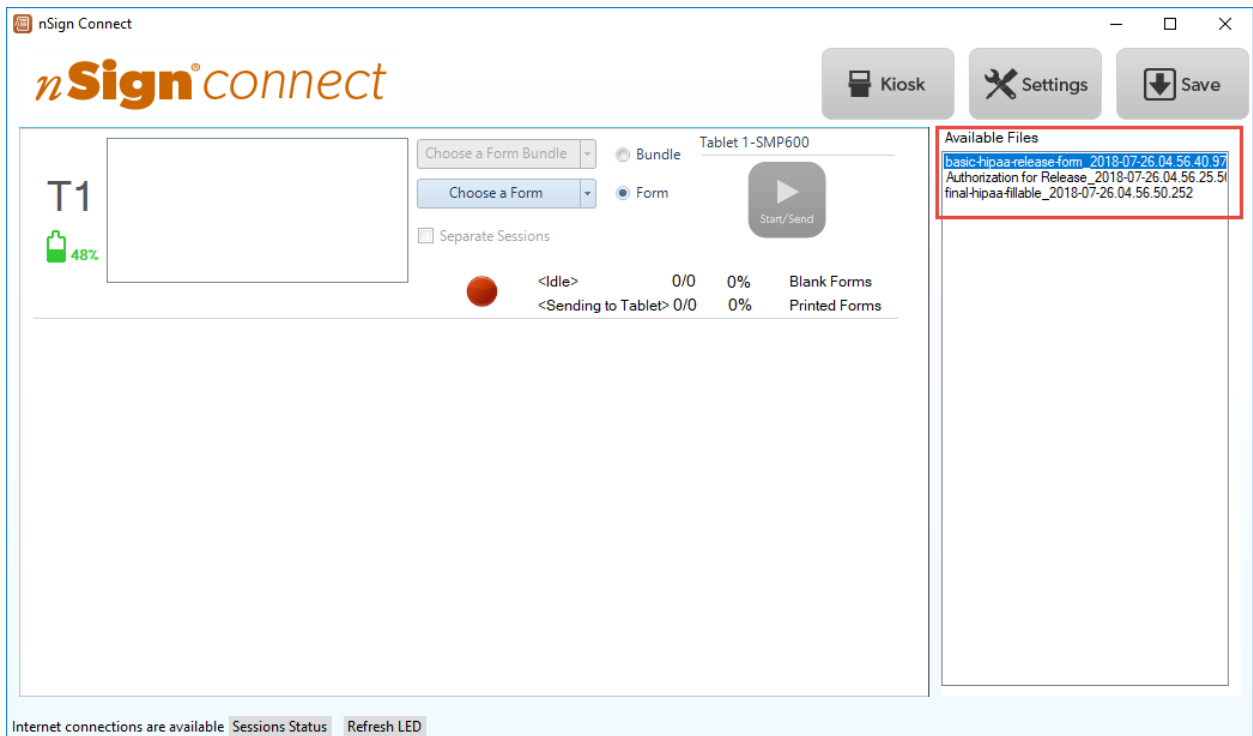
When you select the **Ambir Document Printer** as your printer destination, your form is sent to the **Available Files** window on the nSign Connect dashboard for sending to available connected tablets. Complete the steps below to use this functionality.

1. Select **Ambir Document Printer** from your printer drop down menu within your application (e.g. Nuance Power PDF, Microsoft Word, etc.)

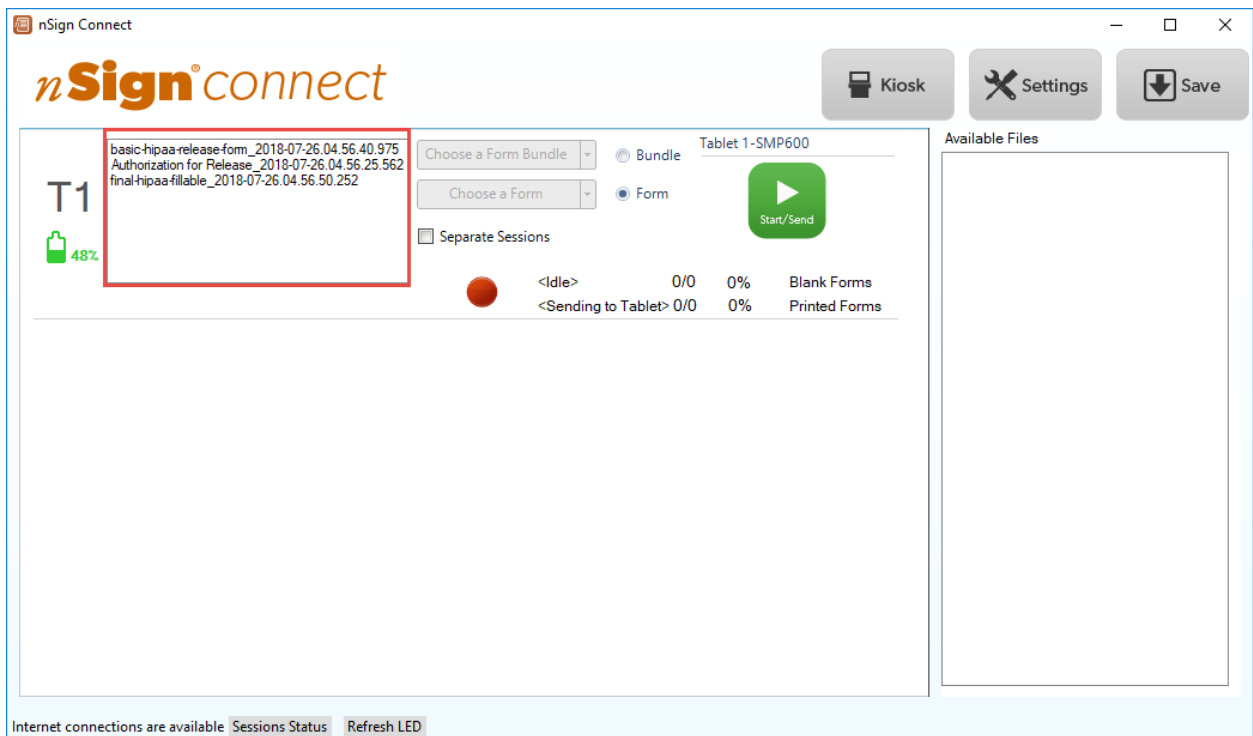


2. Click the **OK** or **Print** button within your application to send the print job to the **Ambir Document Printer**.

3. Your file name will display in the **Available Files** section on the nSign Connect dashboard.



4. Highlight the file(s) you want and **drag it over to the blank window next to the tablet name.**



5. Click the **Start/Send** button to send to the tablet.

nSign (Client Software)

Settings

The nSign application (known as client software) is installed on your tablet with several default settings. Depending on your needs, these settings may need to be adjusted.

To access nSign **System Configuration**, click the  icon in the **top right** corner of the Home screen.

 **The password is *admin*. Note: *admin* is all lower case.**

Below is a list of the System Configurations and their definitions and functions:

1. **Application Version:** The version of nSign application you are using.
2. **Unique Identifier:** You will see an alphanumeric string displayed in the second box. This is your tablet's unique identifier and cannot be changed.
3. **Report Issues:** If you experience issues with nSign, please use this email to report to Ambir Technology.
4. **Set Up Your WiFi Connection:** You should see your WiFi name displayed. If connected on the wrong network, click **Disconnect** and connect to the correct network.
5. **Auto Submit and Delete Session (default):** Automatically submits completed forms to nSign Connect and then deletes the session from the tablet.
6. **Auto Start Dynamic Session (default):** Automatically starts session on tablet when form is submitted.
7. **GPS Tracking: When enabled, forms will have the GPS location of the tablet added to the bottom of the form.**
8. **Show Help Tutorial (default):** Each time a document is sent to the table from nSign Connect, the demo video will display. If unchecked, you will not see the demo upon launch of a document.
9. **Allow Screen Capture:** If checked, allows users to take screen captures within the application. Users must manually check that if they wish to allow for screen capture.
10. **Lock Rotation:** Locks position of nSign when opened. Uncheck to allow full rotation.
11. **Right Scroll Bar:** The default position of the scroll bar is on the left of the screen. Users wishing to change the location to the right must select this option.
12. **Choose Your Input Medium:** If nSign detects your tablet uses a stylus, it will default to use that feature. However, you may unselect this options and users can use their fingertips to complete Forms.
13. **Set Up Your Device Name:** This is where you name your tablet. nSign picks up the default name associated to the tablet.
14. **Unregister Tablet:** Use this button to unregister a tablet you will no longer use.
15. **Register New Connect:** Use this feature when you are registering nSign Connect on a new computer. You will need to also register the tablet to the new PC.

Signing/Completing Form(s) in nSign

Once you have sent your form(s) to the nSign application, you can now sign and complete them. To do this, follow the steps below:

1. Open the **nSign** application on your tablet.
2. If the Help tutorial is displayed, you may watch the short video or touch “I’m ready to begin signing”.
3. The form will then display on your tablet to sign/complete.
4. Use your stylus (or finger, if configured) to complete the fields needed on the form.
5. Use the scroll bar on the right of the screen to move to the bottom of the form or to get to the next page (if multiple pages).
6. Tap **Submit** on the tablet once you are done with the form.
7. In **nSign Connect**, click **Save**.
8. The completed form(s) will then be saved in your saved folder destination (*the default save location for completed forms is C:\Users\Public\Documents\nSignOutput*).



Sessions must be manually deleted if auto delete is not selected in your [Output tab](#).

Using the Scroll Bar in nSign

To scroll up and down on a form in the nSign application, place your finger firmly in the middle of the scroll bar. Swipe up to navigate to the bottom of the form, down to navigate to the top of the form.

When you are done with a form, scroll down to the bottom and click the **green Submit** button.

Starting a Session from the nSign Tablet Application

The nSign Connect administration software provides the option to send blank forms to be stored and available for tablet users to initiate a session without requiring the nSign Connect administration software to “send” a session. Within the nSign Connection administration software go to Settings, General tab and then select the Send to Tablet box adjacent to the Forms Paths that store the forms and/or bundles that you want to be available on your connected tablets.

When forms are stored on a tablet a **Create A Session** icon is displayed in top right icon row. To create a session the tablet user taps this icon and then is prompted for a password. The default tablet user password is **user** (all lower case). The tablet user password may be changed within the nSign Connect administration software, Settings, Admin tab in the **Password Protect Settings** section.

Support

If you experience problems with nSign Connect, please [visit our website](#) for FAQs and support for further assistance.