A Quick Guide to Using Ascertia PDF Sign&Seal v3.5

Product Overview:

The Ascertia PDF Sign&Seal product brings enhanced digital signature and time-stamping capability to PDF documents coupled with user friendly visible signature blocks that can include hand-signature images, logos and other signing data. The advanced functionality offered by PDF Sign&Seal makes it ideal for ensuring integrity of the information, strong authentication of the author and any approvers for any PDF document within the financial, government, defence, pharmaceutical, health or other sectors. PDF Sign&Seal is a separate application that is easy to install and the cost is low enough for deployment within large projects and also within small and medium enterprises. There is no need to purchase the full Adobe Acrobat in order to sign or seal PDF documents any more!

The standard signatures produced by PDF Sign&Seal are interoperable with the Adobe signature format, and can be verified using the freely available Adobe Reader v6 and v7 ensuring embedded signatures have the widest possible reach and can be verified by any recipient. PDF Sign&Seal includes a utility to convert most documents into PDFs and allow forms to be filled in and saved locally as well as signed or sealed.

Ascertia supports open standards such as the IETF, PKIX, ETSI and other relevant industry interoperability norms. PDF Sign&Seal can use certificates issued by internal CAs and all external certificate providers that use open standards.

PDF Sign&Seal signing and time-stamping functionality is also easy to access through a right-click operation in Windows Explorer or via simple tool-bar buttons within Internet Explorer.

Key Features:

PDF Sign&Seal key features:

➔ The ability to open and view PDFs and allow dynamic positioning of digital signatures
➔ Includes MAKE (PDF creation) and FILL (form filling) functionality for maximum utility
➔ Fully-configurable signature appearance including hand-signature image and company logo
➔ Ability to qualify signatures with a reason for signing, the signer's location
➔ Supports cryptographic time-stamping (RFC3161)
➔ Adds signatures to existing signature fields or sign in newly created fields
➔ Can one-click sign or seal multiple files simultaneously with Explorer right-click operation
➔ Uses Windows® CAPI based certificates or PKCS#11 for software or smartcard based keys
➔ It can be substantially pre-configured and have these settings locked by an administrator
➔ Includes ability for administrator to configure a legal notice which is shown to user's before signing
➔ You can sign multiple pages (even in multiple documents) with a single operation.
➔ It can be trained to remember preferred signing locations and use these on future documents
➔ Supports local language translation by end-users or our local partners
➔ And other features – ask us how we can best fit with your business requirements

PDF Sign&Seal is directed at users who need to sign on their desktop. Separately Ascertia can provide PDF Signer Server for signing, timestamping, setting workflows and verifying/validating documents on an application server.

Initial setup - Configuring your default settings

PDF Sign&Seal makes it easy to set your default preferences:
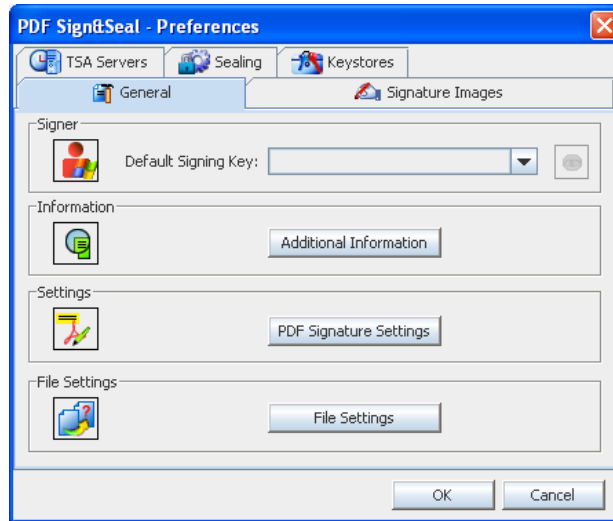
To select your default signing key, press the down arrow button and select your signing certificate. You will be shown all certificates in your Windows IE personal key store which are available for signing purposes. It's a good idea to set a default signing key so at the time of signing you do not need to do this. If you are using a smart card then those keys will also be show in the drop down menu.

PDF Sign&Seal allows you to configure default signing reason, signing location and contact details so that you do not need to enter these every time you sign. Simply click on **Additional Information** button in the above window and the following will be shown:
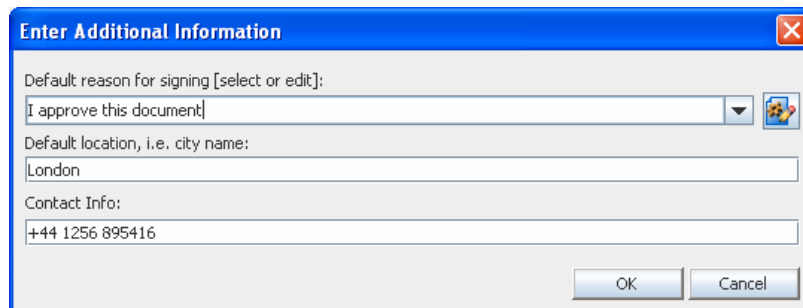
A central administrator can also pre-set these for an organisation. In addition default file locations can be defined to simplify where to start the open file dialogue and also where to save signed files by default. To differentiate file types it is possible to add a suffix extension to the file, e.g. "-s" to denote files that are signed. This allows both the original unsigned copy as well as the signed copy to be kept.

PDF Sign&Seal can also be automatically associated with a custom filetype extension of ".pdfs". Thus PDF files open with an existing Adobe product, e.g. Adobe® Reader and PDFS files open with PDF Sign&Seal.
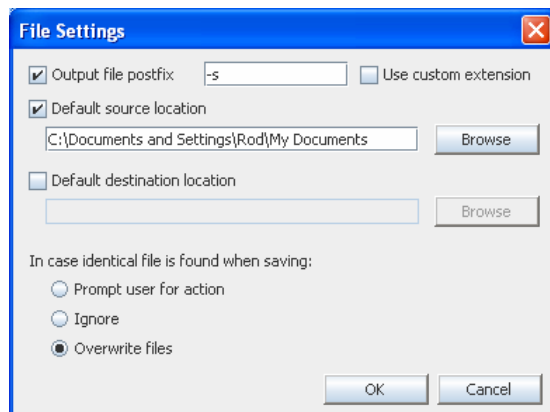
Individual hand signature images and corporate logos are also easy to reference and include within the signing block:

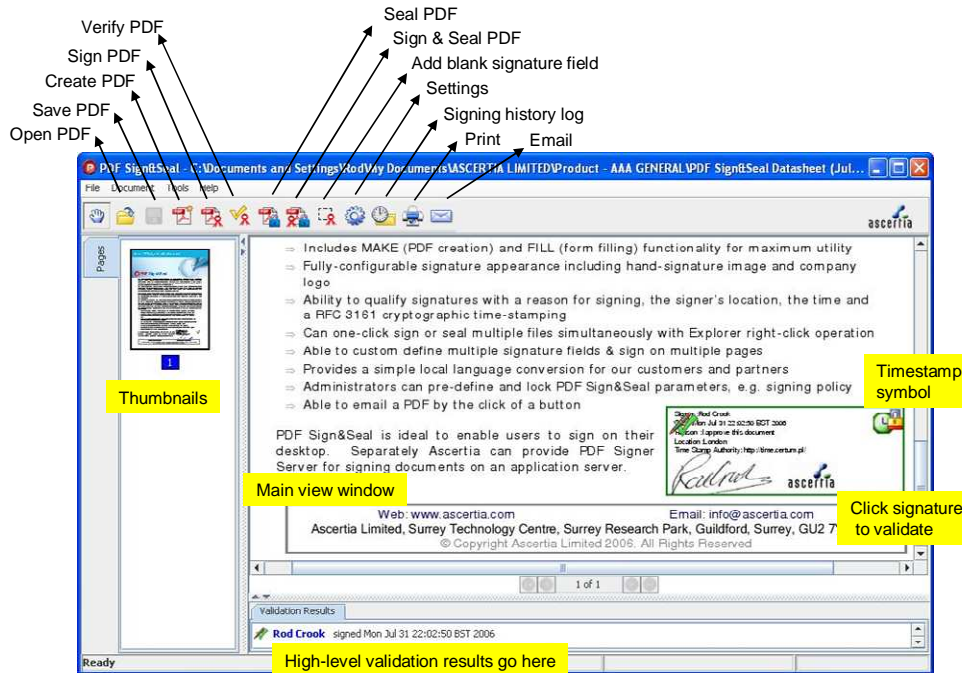These can be easily be scanned or even using script fonts within say Word and image printed to a JPG file.

Creating, Viewing and Signing PDF documents within PDF Sign&Seal

PDF Sign&Seal allows you to create, open and view PDF files. It's easy to draw a signing field or sign in a pre-defined field. An intuitive results area verifies the signatures.

The interface has been designed to be as simple to use as possible so that no training is required. Simply clicking on a signature field triggers the signing action. Timestamps can be applied and the document can also be sealed if required. Clicking on a signature such as "Rod Crook" on the lower validation results pane shows further information regarding rod's digital signature and certificate.

Simple Signing options

PDF Sign&Seal can be configured to simplify a busy manager's time by allowing the default signing field to be pre-defined. Thus if a purchasing manager signs off lots of documents then they can configure PDF Sign&Seal to only add their signature in the field reserved for their approval. This technique can stop staff signing in the wrong location by mistake.

PDF Sign&Seal has the capability to remember where signature fields have been drawn. We call these preferred signature locations. Once you have drawn a signature field the following dialogue box asks which pages you want to sign on; the first; the last; all pages or just selected ones. If this detail is saved as a preferred signing location then this data is remembered and can be used for other documents.

The large screen image below shows that a Quotation signing field has been defined and that this will be used to create a digital signature on page 1. The graphic object gives a thumbnail view or reminder of the signature size and position relative to the page. All or multiple selected pages can be signed in one go.
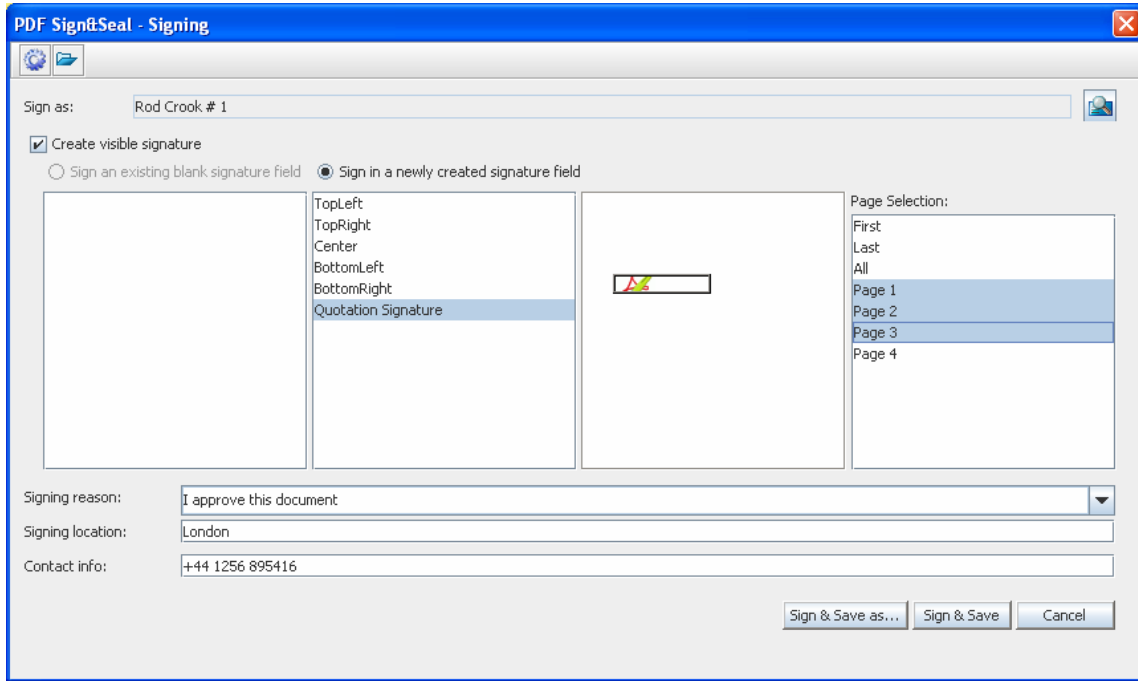
You can embed cryptographic time stamps within your signed PDF documents to independently prove when you actually signed the document. PDF Sign&Seal allows multiple time stamp authority servers to be configured.

PDF Sign&Seal MAKE for PDF conversion from any application

PDF Sign&Seal offers a comprehensive PDF creation facility using a print driver called PDF Sign&Seal Make. This has a comprehensive set of "properties" options for controlling how PDFs are output. Quality parameters can be defined, the creation options set (see below) and the default folders to use for the source and destination files.
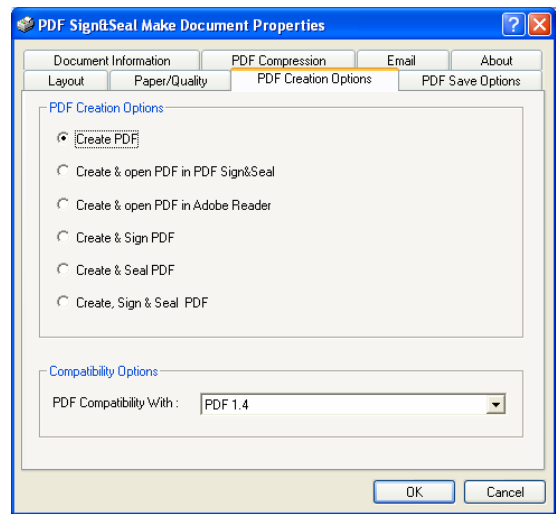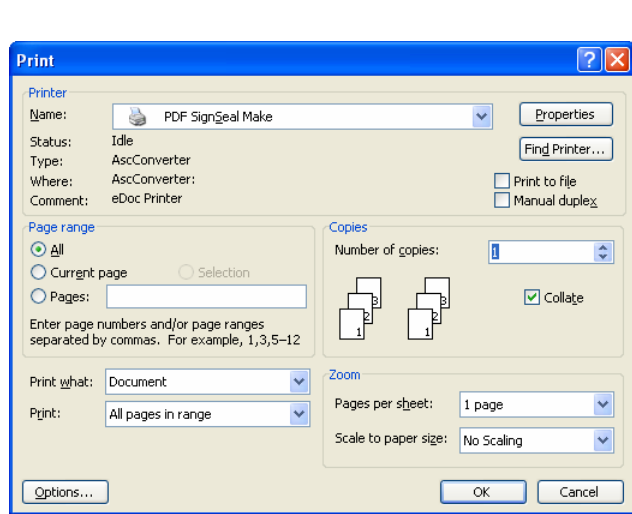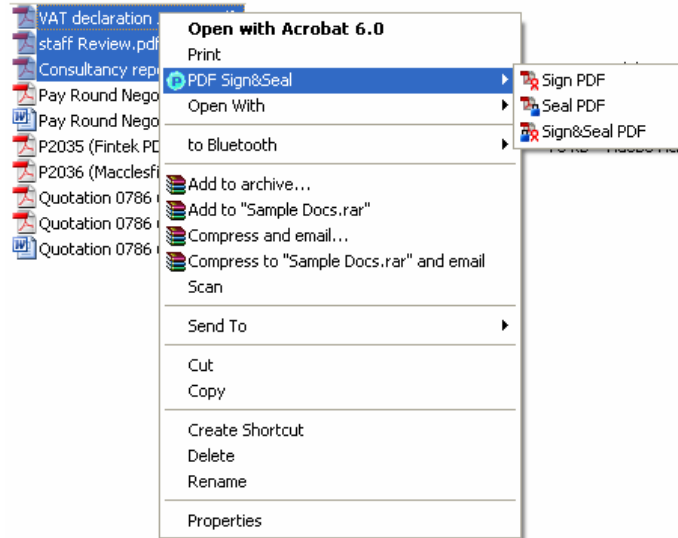
PDF Sign&Seal FILL

PDF Sign&Seal can be used to fill in pre-defined form fields. Documents such as supply contracts, non-disclosure agreements, report approvals, etc may require both a digital signature and some other details such as name, address, values, payment details etc. These can be filled in, saved locally, signed and sent back to the other party by email or by using web or document management applications.

Certified PDF documents can also be filled in and signed by PDF Sign&Seal. A future version of PDF Sign&Seal is expected to be able to create form fields and certify PDFs.

Right Click, Instant signing and multi-file signing

With good Windows Explorer integration you can select right click options to digitally sign PDF files. If the digital signature settings have been selected to allow instant signing then no dialogue is shown and the chosen signing policy is applied. In most cases users want to be prompted to sign and perhaps sign and save as using the main signing dialogue shown above.

Note that PDF Sign&Seal allows multiple files to be selected and signed in one 'batch' type process, requiring one user signing action. This feature is popular with engineering companies that wish to sign in a predefined location on multiple documents

Legal notice setting

The advanced administration control allows the administrator to define a legal notice which will be shown to the user before each signing. Contact Ascertia for details of how this can be controlled. In some industries this is a legal or compliance requirement.

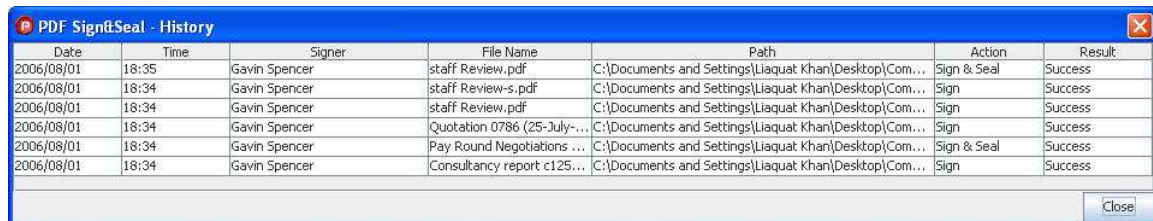The screenshot below shows how this legal notice is added to the signing dialogue shown before:
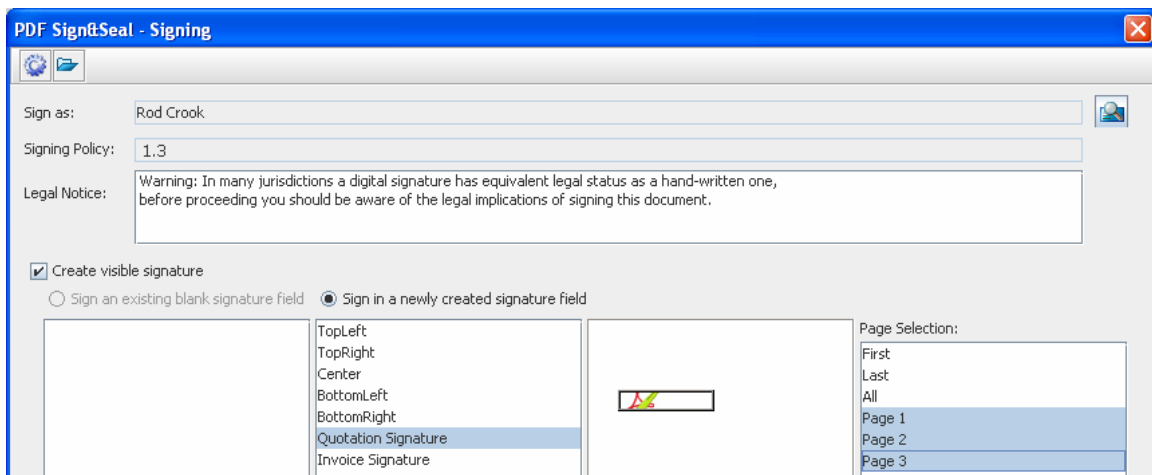
General administrator settings and deployment

Using the advanced administration control an administrator can in fact pre-configure the vast majority of PDF Sign&Seal settings explained above before deployment to end-users. The administrator can also lock important settings within the GUI from change, thus further minimising problems for end-users. This minimises help desk calls and makes the deployment both more efficient and cost-effective. Consult Ascertia for further details on how to perform advanced administration control.

History of all signings

New in v3.5 is the ability of PDF Sign&Seal to provide an audit trail of all signing (and sealing) operations that you perform so you can easily review what was signed and when. Simply launch the history viewer from the PDF Sign&Seal toolbar and the following screen is presented:

Product Notes

1) Signatures produced with Evaluation copies of PDF Sign&Seal will have word TRIAL stamped within signature appearance. You can check the transaction limit of your Evaluation copy of PDF Sign&Seal by viewing the application's About box, found under HELP menu. This limit can be extended on request.

2) A detailed, ease to use on-line help manual is provided with the product

3) Ascertia also provides a server-side product called PDF Signing Server which can sign PDF documents on behalf of multiple users through Web Services interface or via batch mode. Ask about our other solutions work including fast (and free) PDF viewers, plus verification and validation options.

Contact Details

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