

CoSign Quick Guide **Virtual Signing with CoSign**

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This chapter describes how to use the CoSign® OmniSign application to manage all digital signature related operations in a PDF document, and sign any printable data from any application.

The major benefits offered by OmniSign include:

- » Easily sign existing PDF documents.
 - » Sign non-PDF documents by using the document's application File > Print command.
- While CoSign comes with extensive third party application support for digital signatures, there are other applications that do not provide digital signature support such as ERP systems, homegrown systems, and others. With OmniSign, any of these applications that support standard printing functionality can utilize OmniSign to add digital signatures to their documents.
- » Manage all digital signature related operations in a PDF document

Launching OmniSign

There are several ways to launch the CoSign OmniSign application.

Launching OmniSign with a PDF file

If your file is already in PDF format, you can:

- » Right-click the file name and select **Sign with**

CoSign. OmniSign is launched for the PDF file.

*Note: If the **Sign with CoSign** option does not exist in the right-click menu, you can add it as follows: Launch OmniSign via the CoSign Control Panel, and in the OmniSign application select **Tools** → **Add 'Sign with Cosign' to PDF files.***

- » Select **OmniSign** in the CoSign Control Panel. OmniSign is launched. Open a file by selecting **File > Open** in the OmniSign menu bar and browsing to the file.

Launching OmniSign with a non-PDF file

If your file is in non-PDF format, you can easily convert it to PDF using ARX CoSign printer, and at the same time launch the OmniSign application.

To launch OmniSign with a non-PDF file:

- » Open the file in its application.

- » Select File > Print. The *Print* dialog box appears (Figure 1 displays the standard *Print* dialog box that appears in Word)
- » Select ARX CoSign Printer as the printer.
- » Change the print properties if desired.
- » Click Print.

Clicking Print triggers the PDF conversion process and the OmniSign application is launched for the newly created PDF file.

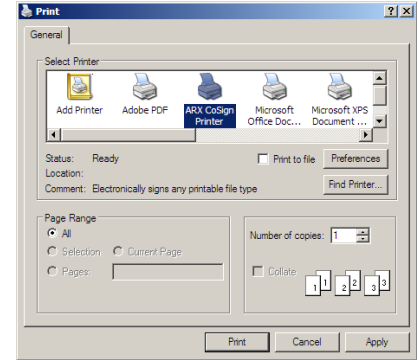


Figure 1: Selecting the ARX CoSign Printer

Getting Started with OmniSign

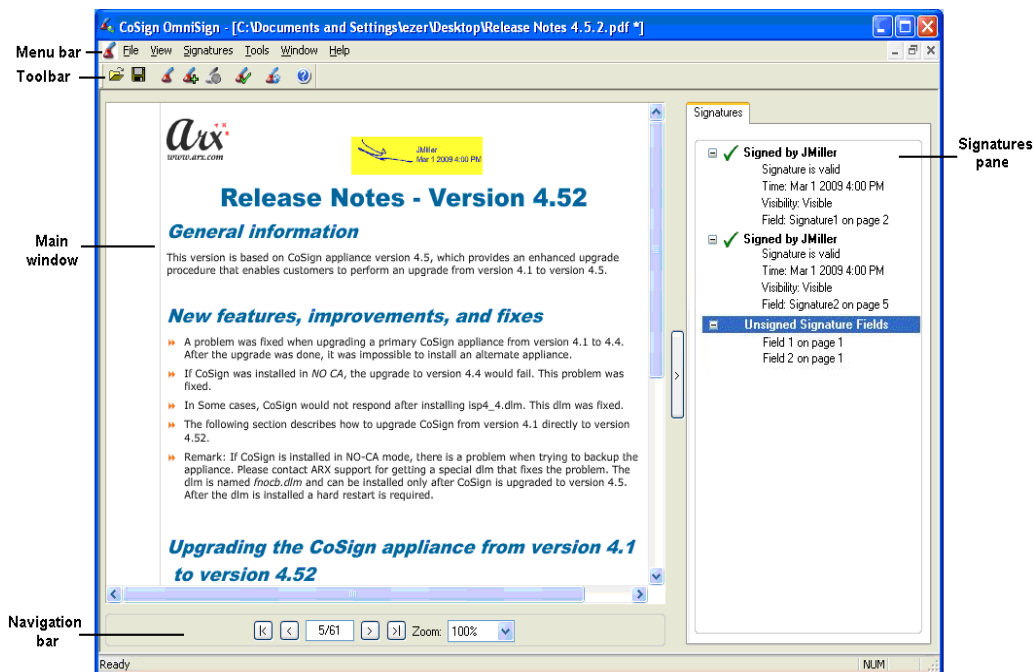


Figure 2: OmniSign Window

The OmniSign window (Figure 2) includes the following elements:


- » **Menu bar** - Enables you to perform various signature related operations such as creating and signing a new signature field in the PDF document, adding a new electronic signature into the document, and validating all existing digital signatures in the document.
- » **Toolbar** - Some of the operations that can be performed using the OmniSign menu bar can also be activated using the OmniSign toolbar.
- » **Main window** - Displays the currently open PDF document or documents.
 - **Navigation bar** - Enables you to navigate to a certain page in the current document, or control the zoom level of the currently viewed page in the main window of OmniSign.
 - **Signatures pane** - Enables you to view all signed and non-signed signature fields, and perform various operations on the signature fields.

Note: To configure OmniSign options, refer to the [Complete CoSign Central User Manual \(Chapter 7: OmniSign - Signing PDF and non-PDF files - Configuring OmniSign Options\)](#)

Creating and Signing a Digital Signature Field

Note: If you wish to view or change any OmniSign settings before signing, refer to [Configuring Default Signature Settings](#).

To create and sign a digital signature field within the OmniSign application:


- » Click  in the toolbar, or select Signatures → Sign (Create and Sign).
- » In the main window, left-click the mouse once to specify one corner of the field. Continue dragging the mouse until the desired size is displayed, and release the mouse to specify the opposite corner.
- » The signature will appear automatically, unless CoSign was configured to include additional elements:
 - **Reason option:** The *Select Reason* dialog box appears. Enter or select a reason and click **OK**. For instructions on configuring the Reason option, refer to the [Complete CoSign Central User Manual \(Chapter 4: Signing Microsoft Office Documents - Default Signature Settings - General Parameters\)](#).
 - **Title option:** Enter the title of the signer when prompted.
 - **Certificates:** If you have several certificates in CoSign, you are prompted to select the desired certificate. If you have a single certificate, it is automatically selected.
 - **Graphical images/initials/logos:** If you have several graphical images, initials and/or logos in CoSign, you are prompted to select the desired graphical image.

The created signature field is digitally signed.

Inserting a Digital Signature Field

You may wish to insert a digital signature field without signing it, for example if you are designing a document template.

To create a digital signature field:

- » Click  in the toolbar, or select Signatures → Add Digital Signature Field.
- » In the main window, drag the mouse to the desired location of the new signature field. Left-click once to specify one corner of the field. Continue dragging the mouse until the desired size is displayed, and release the mouse to specify the opposite corner.


A *Default Signature Settings* window appears (refer to [Configuring Default Signature Settings](#)). This window is identical in appearance to the window in which you set general signature default settings, but the settings you specify will apply only to the digital signature field you just created. Non-relevant fields are disabled.
- » Specify the settings for the digital signature field.
- » Click **OK**.

The digital signature field is created.

Inserting an Electronic Signature

You can incorporate an electronic signature into the PDF document. An electronic signature is a graphical image of an end-user's handwritten signature. The end-user can enter his/her electronic signature using a graphical signature pad. This method is appropriate for a Point of Sale scenario, for example. In this type of usage, after the purchase form is completed, the customer inserts his/her electronic signature, and the local sales person digitally signs the whole document.

To enable inserting an electronic signature, you must attach a pad to the workstation, or use a Tablet PC/mouse (refer to [CoSign Quick Guide - CoSign Configuration](#) for more information). If you are using a pad in a CoSign Client installation, it is required that the CoSign client be installed with the ARX CoSign admin component which enables using a signature pad. To insert an electronic signature:

- » Click  in the toolbar, or select Signatures → Add Electronic Signature.
- » In the main window, left-click once to specify one corner of the field. Continue dragging the mouse until the desired size is displayed, and release the mouse to specify the opposite corner.

You are prompted to enter a signature using the currently connected signature pad, or Tablet PC /mouse. If the pad includes a display, the graphical signature appears on both the display and the PC (Figure 3).

A new electronic signature image is created in the location you indicated.

You can add an electronic signature several times before digitally signing the PDF document.

Note: The electronic signature option is disabled by default. Use the CoSign Configuration Utility to enable the option by selecting **Allow electronic (graphical) signatures** in the OmniSign Advanced tab.

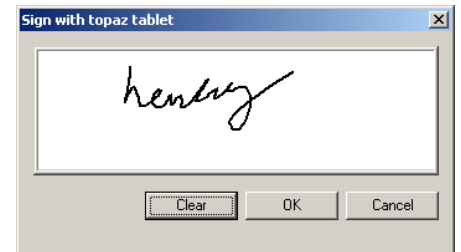



Figure 3: Electronic Signing using a Signature Pad

Validating All Signatures

To validate all signatures, click  in the toolbar, or select Signatures → Validate all Signatures.

The Signature Pane displays the validity status of each signature. In the main window, a valid signature appears with a green background, an invalid signature appears with a red background, and an unknown (not yet validated) signature appears with a yellow background.

Viewing Signature Details

The Signatures pane lists all the digital signature fields inside the PDF document. For every signed field the following information is displayed:

- » Signer name and graphic indication of signature validation status
- » Signature validation status - Valid, Invalid, or Unknown (not yet validated).
- » Signature time.
- » Visibility - Whether the digital signature is visible in the PDF document.
- » Reason - If entered.
- » Signature field name and Signature page number.


Manipulating a Single Signature Field

You can perform various operations on a single signature field. These operations are available by right-clicking a signature field in the Signatures pane, or right-clicking the signature field in the main window. The operations include:

- » **Sign** - Signs or re-signs the signature field. You are prompted to enter a reason and title if the corresponding settings are selected in the default signature settings.
- » **Validate** - Validates the digital signature. The display of the signature in the main screen is refreshed to reflect the validation state of the signature.
- » **Clear** - Clears the digital signature. This results in an empty signature field.
- » **Remove** - Removes the digital signature as well as the signature field from the document.
- » **Settings** - Displays the signature settings in view-only mode. To change signature settings, you must remove the signature and create it again.
- » **Details** - Displays the digital signature status and certificate status.

Configuring Default Signature Settings

You can configure default signature settings to apply to all signatures, or to an individual signature field.

- » To configure default signature settings for all signatures, click  in the toolbar or select **Tools → Default Signature Settings**. The *Default Signature Settings* dialog box appears. The settings you configure will apply to all signatures except those whose settings were individually set.
- » To configure signature default settings for an individual signature, insert a new digital signature field as described in *Inserting a Digital Signature Field*. The *Default Signature Settings* dialog box appears (Figure 4).

The *Default Signature Settings* dialog box contains the parameters that influence the signature appearance. It includes parameters for the following:

- » Configuring the Signature General Parameters.
- » Configuring the Signature Appearance.
- » Configuring Date and Time Format.
- » Viewing the Signature Field Size and Position.

Configuring the Signature General Parameters

The **General** pane (Figure 5) includes the following parameters:

- » **Field name** - Specify a name for the signature field. This option is relevant only when configuring settings for a specific signature field.
- » **Allow entering reason** - Specify whether to prompt the signer to enter a reason during signing. This is the reason that is part of the signature field and can be seen in the signature pane when the file is opened in Adobe Reader. If you also select **Reason** in the **Appearance** pane, the reason will also be displayed inside the signature on the document itself.

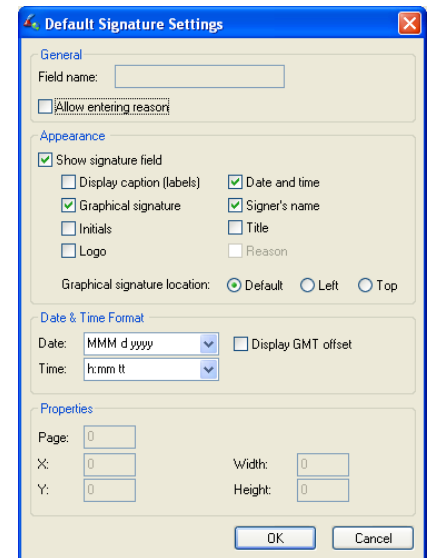


Figure 4: Default Signature Settings

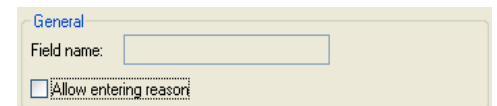


Figure 5: Signature General Parameters

Configuring the Signature Appearance

The **Appearance** pane (Figure 6) includes the following parameters:

- » **Show signature field** - Specify whether the signature field will be visible. When this box is unchecked, the signature appearance and the signature size and position settings are disabled, and the signature rectangle is hidden.
- » **Display caption (labels)** - Indicates whether to use captions such as Date, Reason, Signed by, for the fields that will be displayed in the signature field.
- » **Graphical signature** - Specify whether to display the graphical signature in the signature field.
- » **Initials** - Specify whether to display the initials. It is not recommended to select both **Graphical signature** and **Initials**.
- » **Logo** - Specify whether to display a logo.
- » **Date and time** - Specify whether to display the date and time of signing in the signature field.
- » **Signer's name** - Specify whether to display the signer's name in the signature field.
- » **Title** - Specify whether to prompt the user to enter a title during signing.
- » **Reason** - Specify whether to display the reason for signing in the signature field on the document itself.
- » **Graphical signature location** - Specify the location of the visible signature:
 - **Default** - Signature location is determined by the settings configured in the CoSign Configuration Utility.
 - **Left** - The graphical signature is on the left and the text is on the right.
 - **Top** - The graphical signature is on the top and the text is on the bottom.

Note: In order to use the **Initials** and **Logo** features, images for the initials and logo must be created ahead of time. Please refer to the [CoSign Quick Guide - CoSign Configuration](#).

Configuring Date and Time Format

If the date and time are displayed in the signature field (that is, the **Date and Time** box is checked in the **Appearance** pane), you can set the date and time format as follows (Figure 7):

- » **Date** - You can select a date format from the drop-down list or create a new one. Refer to Figure 8 for an explanation of the date format notation.
- » **Time** - You can select a time format from the drop-down list or create a new one. Refer to Figure 8 for an explanation of the time format notation.
- » **Display GMT offset** - Specify whether to display the time zone of the signature operation in relation to GMT.

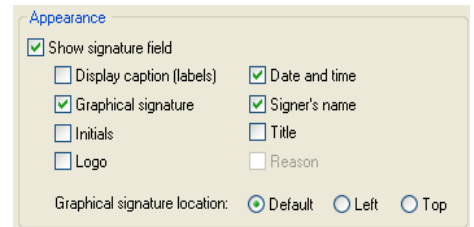


Figure 6: Signature Appearance

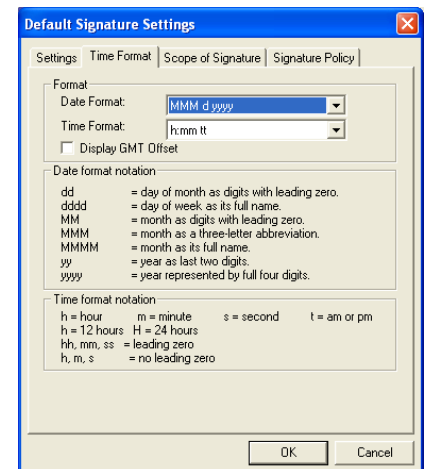


Figure 7: Default Signature Settings - Time Format Tab

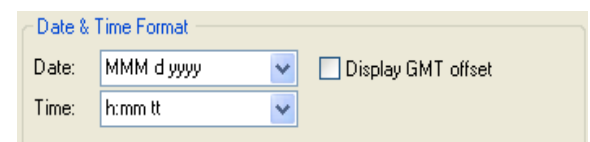


Figure 8: Date & Time Format

Note: You can modify the format of the date and time strings so that the displayed date and time contain some additional fixed text. Take care not to change the letters that identify the year (y), month (m), day (d), hour (h), and minutes (m), even if these letters are different in your native language.

Viewing the Signature Field Size and Position

The **Properties** pane (Figure 9) displays the signature field's size and position as follows:

- » **Page** - The page number of the page in which the signature field is located.
- » **X** - The horizontal distance in Adobe pixel units of the signature field's bottom left corner from the document's {0, 0} point, usually (but not always) the bottom left corner of the document.
- » **Y** - The vertical distance in Adobe pixel units of the signature field's bottom left corner from the document's {0, 0} point, usually (but not always) the bottom left corner of the document.
- » **Width** - The width of the signature field in Adobe pixel units.
- » **Height** - The height of the signature field in Adobe pixel units.



Figure 9: Signature Size and Position

Batch Signing

The OmniSign application can also be used for signing multiple files in unattended mode.

To run OmniSign for batch signing:

- » Run **Start** → **Programs** → **ARX CoSign** → **CoSign Control Panel**. In the CoSign Control Panel select **OmniSign settings**. The OmniSign window appears.
- » Configure the signature settings you wish to apply to all the files to be signed.
- » Turn on silent mode by selecting **Enable Silent Mode** in the Advanced tab of the OmniSign Profile, in the CoSign Configuration Utility (refer to [Complete CoSign Central User Manual \(Chapter 11: Using the CoSign Configuration Utility - Editing a Profile's Advanced Settings\)](#)).
- » If you want the signed files to be stored in a different folder than the one they are stored in before signing, specify the folder in the **Default folder** field (Figure 10).
- » Click **OK** to close the OmniSign window.
- » Run one or more instances of OmniSign.exe /s <PDF file>, either in parallel or serialized, where <PDF files> specifies a group of files using wildcards, for example c:\tmp*.pdf.

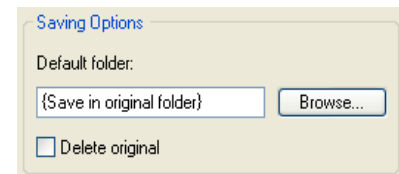



Figure 10: Saving Options

OmniSign Menu Bar

The OmniSign menu bar includes the following options:

Menu Item	Options	Description
		This menu option is available in <i>Static</i> display mode, in which a single document is displayed in the main window.
	Restore	Switches the display mode to <i>Cascading</i> mode.
	Minimize	Minimizes the current document in the main window.
	Close	Closes the current document.
	Next	Displays the next available document.
File		
	Open	Opens a PDF file. The new file is opened in addition to the currently opened PDF files.
	Close	Closes the current PDF file.
	Save	Saves the current PDF file to the default location. If the original file is a non-PDF file, you are prompted to specify a file location.
	Save As	Saves the current PDF file to a user-selected location.
	Email	Invokes an email client, with the current PDF file attached.
	Print	Prints the current PDF document.
	Exit	Closes OmniSign.
View		
	Toolbar	Toggles viewing the OmniSign toolbar.
	Status Bar	Toggles viewing the OmniSign status bar.
	Go To	Displays the First Page, Next Page, Previous page, Last Page, or specific Page of the current PDF document.
	Zoom	Sets the zoom.
	Navigation Type	Sets whether to display a Single Page in the view window, or whether to display the whole PDF document in Continuous Scrolling.
	Scroll Up	Scrolls up.
	Scroll Down	Scrolls down.
Signatures	Sign	Creates a signature field and activates a digital signature operation into the current PDF document. You can place and stretch the digital signature field.

Menu Item	Options	Description
	Add Digital Signature Field	Inserts a new digital signature field into the current PDF document. You can place and stretch the digital signature field.
	Add Electronic Signature Field	Inserts an electronic signature into the current PDF file.
	Validate All Signatures	Performs a digital signature validation of all signatures in the current PDF file.
Tools		
	Default Signature Settings	Sets the following default signature settings: General, Appearance, Date & Time Format, and Properties.
	Options	Sets the OmniSign settings.
	Restore Defaults	Restores all the default settings.
	Add 'Sign With CoSign' to PDF files	Adds Sign with CoSign to the right-click menu that appears when you right-click a PDF file.
Windows	Cascade	Cascades all opened PDF document windows.
Help	About	Displays information about OmniSign, and a link to the ARX web site.
	Contents	Displays this chapter in on-line Help format.