xyzmo®
SIGNificant SIGNATURE SOLUTIONS

SIGNificant™ Client

v4.0.0.x

User Guide v4.0.0.7

© 2012 xyzmo SIGNificant Group. All rights reserved.

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual or otherwise, for any purpose other than the purchaser's personal use, without the express written consent of xyzmo SIGNificant group.

xyzmo SIGNificant group makes no representations or warranties with respect to the contents hereof and specifically disclaims any implied warranties or merchantability or fitness for any particular purpose. Further, xyzmo SIGNificant group reserves the right to revise this publication and to make changes in the contents thereof without obligation to notify any person of such revisions or changes.

In no event should xyzmo SIGNificant group be liable for any incidental, direct or indirect, special or consequential damages whatsoever (including, but not limited to loss of profits) arising out of or related to this manual, or the use of the product, or any use thereof.

All trademarks appearing in this manual are the property of their respective holders.

More information regarding xyzmo SIGNificant's products can be found at http://www.xyzmo.com some videos can be found at http://vimeo.com/xyzmo/.

Contents

Introduction 5

- **About xyzmo SIGNificant** 5
- **About SIGNificant Client** 5
- **About This Guide** 6
- **Related Publications** 6
- **Important Remarks** 6

Setting Up SIGNificant Client 7

- **Requirements** 7
- **Installation Procedure** 8
- **Installing SIGNificant Client** 8
- **Registering SIGNificant Client Software** 14
- **Installing Certificates** 15
- **Updating SIGNificant Client** 18
- **Uninstalling SIGNificant Client** 18

Getting Started with SIGNificant Client 19

- **Accessing SIGNificant Client** 19
- **Using the SIGNificant Client Interface** 21
  - **Using the Tree** 21
  - **Using the Description Area** 22
  - **Using the Document Pane** 22
- **Opening Documents** 24

Using the SIGNificant Client Printer 29

MS Office 2007/2010 Plugin 30

Verifying Documents 31

Enrolling a biometric profile 33

Designing Documents 35

- **Designing Documents in SIGNificant Client** 35
  - **Adding Signers and Fields** 36
  - **Removing Signers** 38
  - **Removing Signature Fields** 38
- **Saving the Design** 39
- **Designing Documents in Other Programs** 40

Additional Features for Documents 43

- **Handwritten Annotations** 43
- **Text Annotations** 44

Form Filling 45
Password Protection 45
Add an attachment to the document 46

Signing & Sealing Documents 50
Signing Documents On the Fly 55
Signing documents by stepping through signature fields 60
Options Menu 61
Using the Undo Button 65

Continuing With the Signed Document 67
Saving Copies of a Document 67
Sending an e-mail with the signed document 67
Printing the signed document 68
Closing SIGNificant Client 68
Open signed documents in the Adobe Reader 69

Introduction

This chapter introduces SIGNificant Client and this guide.

About xyzmo SIGNificant

xyzmo's enterprise e-signature platform allows contracts, agreements, applications, NDAs, forms, or any document that requires a signature, to be signed electronically on signature pads, payment terminals, the iPad, Android devices, with digital certificates or online via 'click-to-sign'. It could not be easier or more secure.

xyzmo SIGNificant is a private company based in Ansfelden, Austria with international offices in the United States and Romania. xyzmo and its predecessors have a combined history of more than 10 years of digital signature expertise. Our solutions have processed millions of electronic signatures to-date around the globe.

About SIGNificant Client

The SIGNificant Client enables signing and sealing electronic documents using a broad range of signature-capturing devices from various manufacturers, in addition to digital certificates. The SIGNificant Client is especially suited for professionals whose working conditions don't include online connectivity on a regular basis or for those who wish to work offline.

It's That Easy:

1. **Open any Document for Signing**
    - In order to sign a PDF document, you simply open it in the SIGNificant Client and either sign immediately, or design the document on the fly according to your needs before you have it signed.
    - The SIGNificant Client is equipped with a universal PDF converter. It enables a quick document conversion functionality, using a toolbar that plugs into office applications or the installed printer driver.

2. **Capture a Handwritten Signature or Apply a Customizable Seal Imprint**
    - Next, capture your handwritten signature using a Tablet-PC or a broad range of signature pads from various manufacturers.
    - Alternatively, you can seal documents with a customizable seal imprint (Approved, Declined,..) using either the out-of-the-box xyzmo digital certificate or a personal one located in your certificate store.

1. **You're Done!**
    - The document is now signed and sealed against future modifications and can be viewed and verified by any external user using the free Adobe Reader. The signed document can be stored on your local computer and uploaded to the company's server at a later stage.

You can find a short video about the product here: http://vimeo.com/2825966

About This Guide

This guide contains all the information necessary to install and use SIGNificant Client.

Related Publications

This guide should be used in conjunction with:

- *SIGNificant Client Administrator Guide*

Important Remarks

Laws and regulations regarding electronic signatures vary from one country to the next. The user of the SIGNificant Client accepts all responsibility to comply with applicable laws and regulations within this context, and acknowledges that xyzmo SIGNificant is not liable for this in any way whatsoever.

There are many possibilities for configuring the appearance and functionality of the SIGNificant Client. Your interface may look quite different from the pictures in this guide, because your company has decided to use a different customization for the interface and/or only a subset of the functionalities. Please contact your helpdesk in this case.

Setting Up SIGNificant Client

This chapter explains how to install, register, and uninstall SIGNificant Client.

Requirements

In order to install and register SIGNificant Client, you must have administration rights on the local machine. In addition, the machine must meet the following requirements.

Table 1: SIGNificant Client Requirements

Item	Requirement
Hardware	
Signature tablet	A Wintab-compatible device, tablet-pc or signature tablet
Smartcards or tokens	Required only if certificates located on smartcards or tokens are to be used
Printer port	
Software	
General certificate	If a signer does not use a personal certificate to sign the document, the document is sealed with a general certificate. While SIGNificant Client comes with a demo certificate, it is recommended that you use a certificate that has been issued to you or your company.
Personal software certificate	Signers can seal a document with a personal certificate, in addition to or instead of their handwritten signature.
Relative driver for tablet	
Relative driver for smartcard readers or tokens	
OS	Microsoft Windows XP, Microsoft Windows Vista 32bit, WIN7
Development environment	Microsoft .NET Framework 2 and up
Registration (challenge/license key)	SIGNificant Client comes with a built-in trial license. If you do not want the trial mark to appear, you must register your software in order to obtain a license.

Installation Procedure

Setting up SIGNificant Client includes the following steps:

1. Install SIGNificant Client.

   See *Installing SIGNificant Client* on page 8.

2. Register your SIGNificant Client software.

   See *Registering SIGNificant Client Software* on page 14.

3. (Optional) To enable signers to digitally sign documents using a certificate, install a certificate.

   See *Installing Certificates* on page 15.

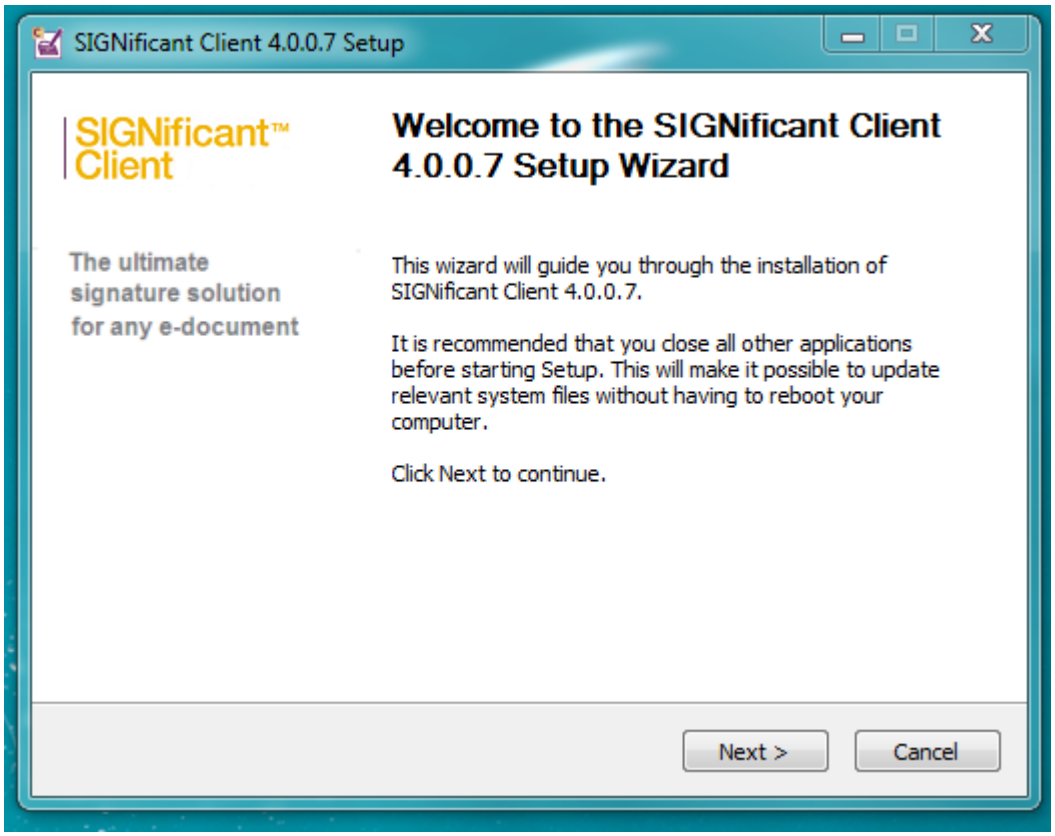
Installing SIGNificant Client

Note: You can download the SIGNificant Client here:
http://www.xyzmo.com/en/resource-center/Pages/SIGNificantClient.aspx

To install SIGNificant Client

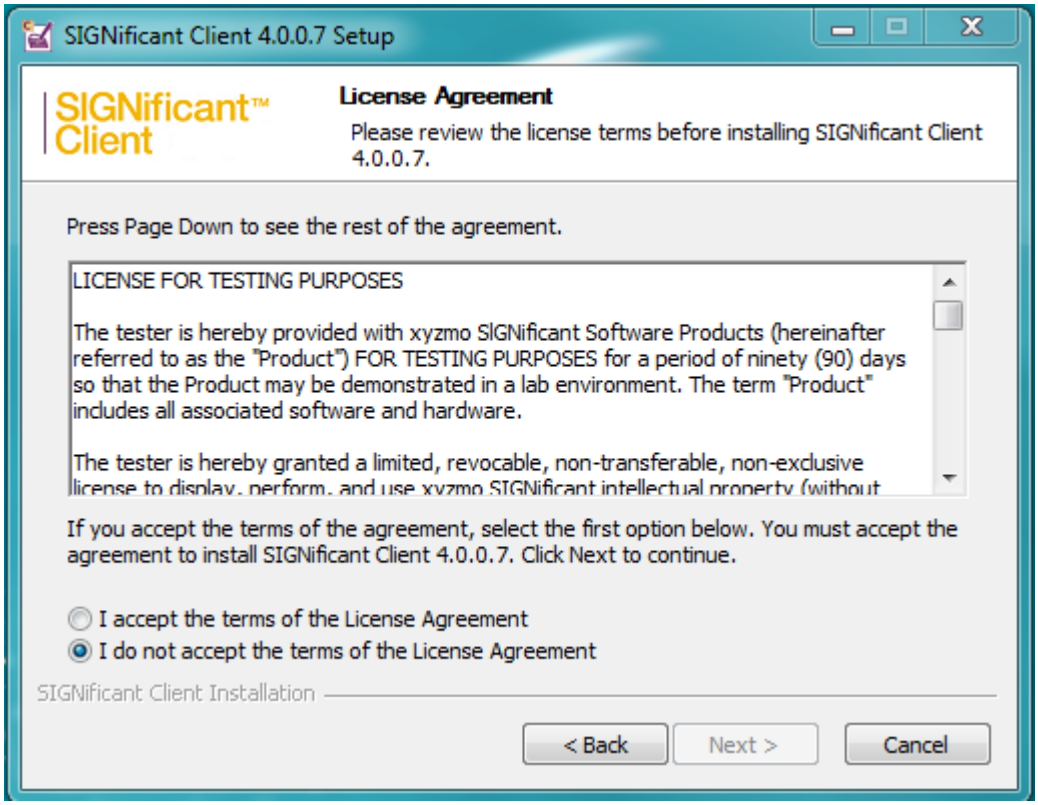
1. Double click on the file `SIGNificantClientXXX.exe`.

   The **SIGNificant Client Setup Wizard** opens, displaying the **Welcome** screen.



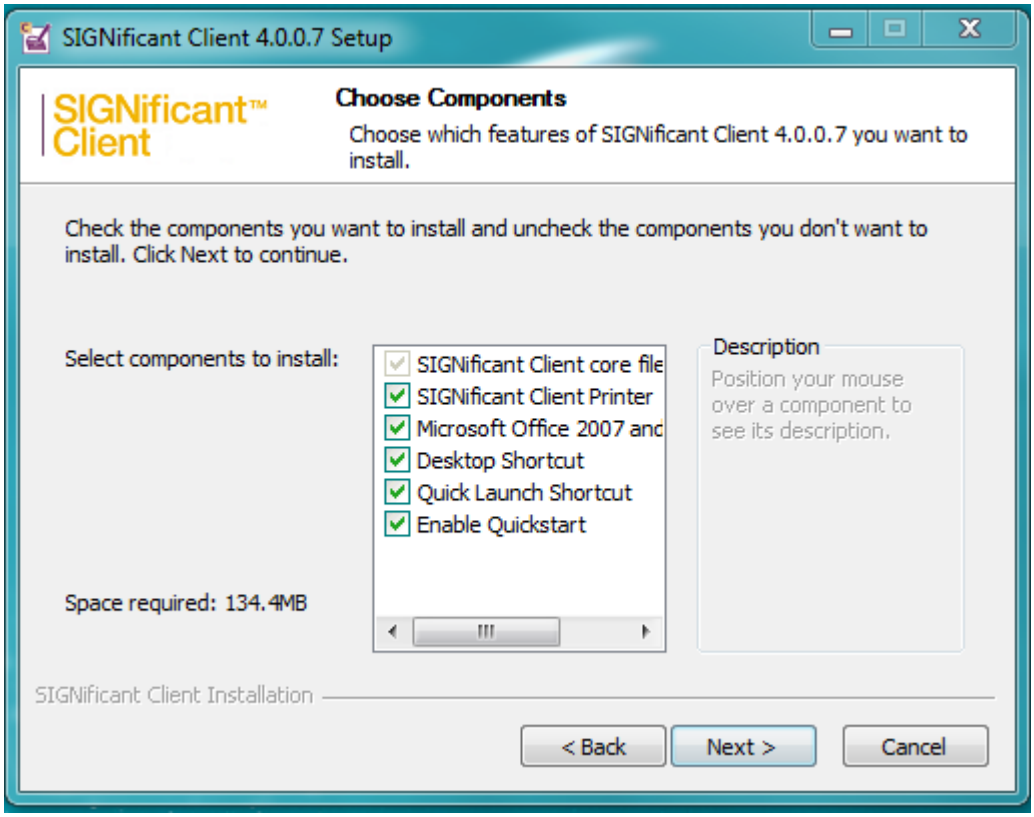
2. Click **Next**.

The **License Agreement** dialog box appears.



3. Read the license agreement carefully, and click **I accept the terms in the License Agreement** if you agree.
4. Click **Next**.

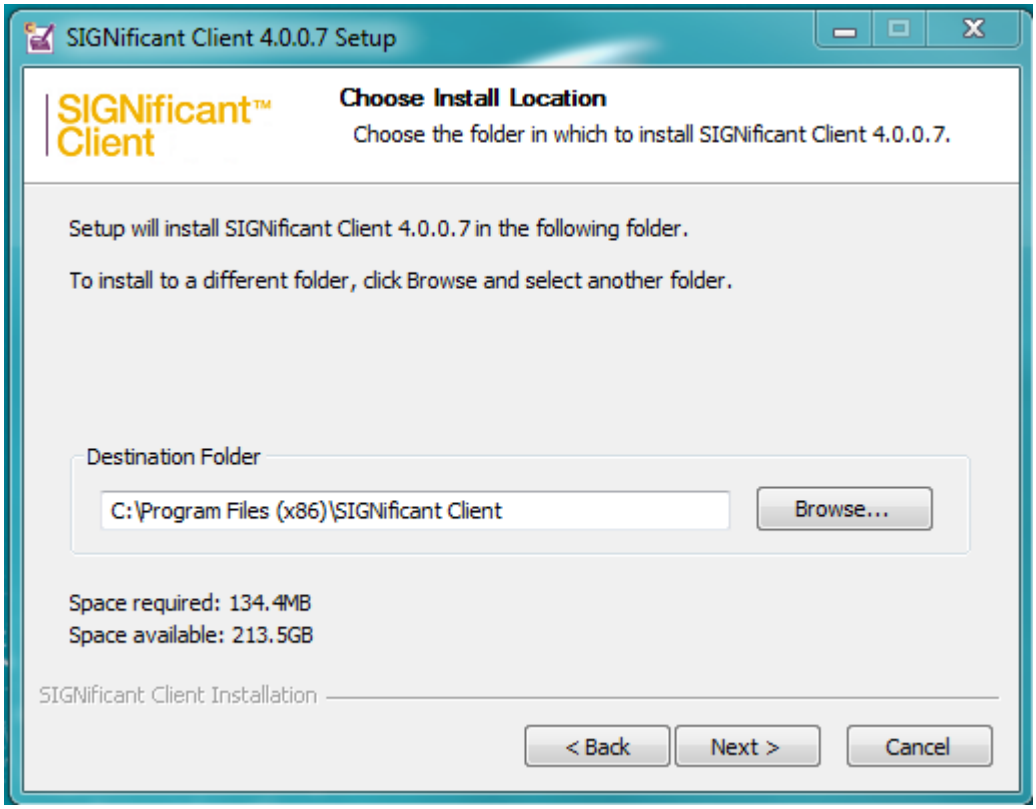
   The **Choose Components** dialog box appears.



5. Select the check boxes next to the components you want to install.

6. Click **Next**.

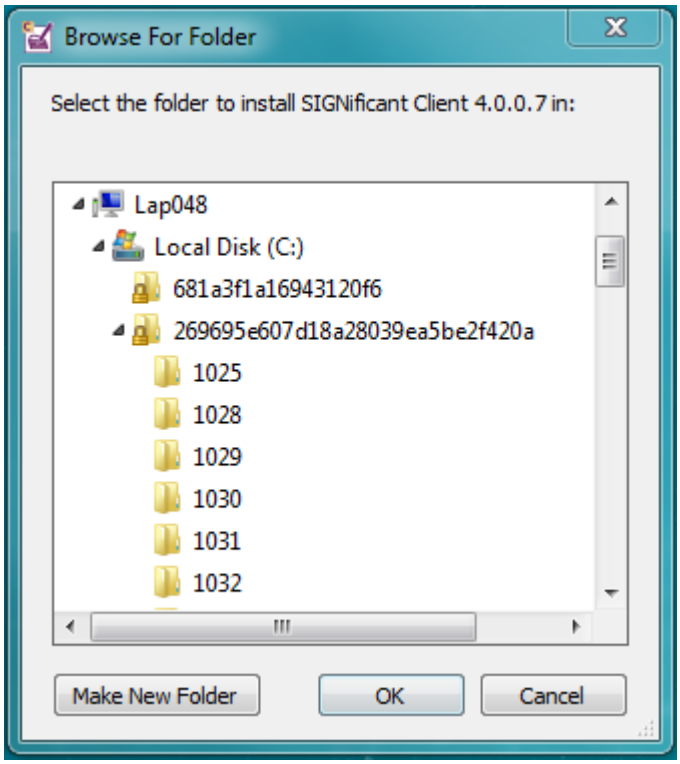
   The **Choose Install Location** dialog box appears, displaying the default installation folder.



7. To install SIGNificant Client to a different folder, do the following:

   a. Click **Browse**.

      The **Browse For Folder** dialog box appears.

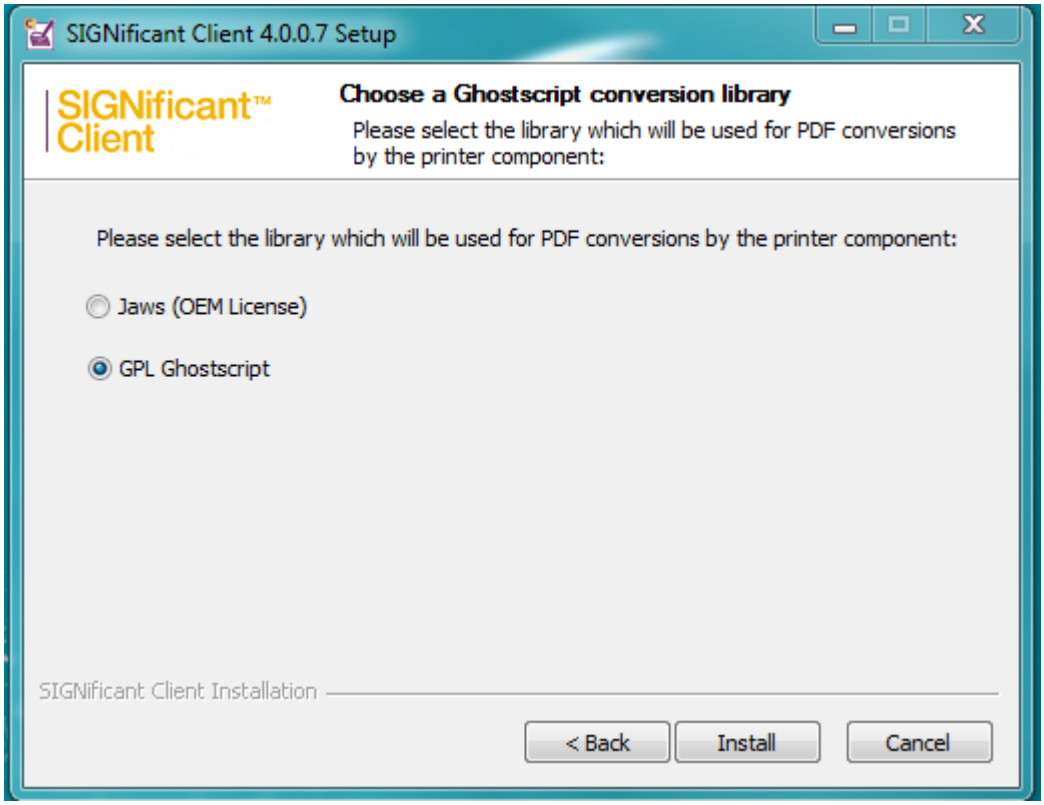


   b. Click on the desired folder.

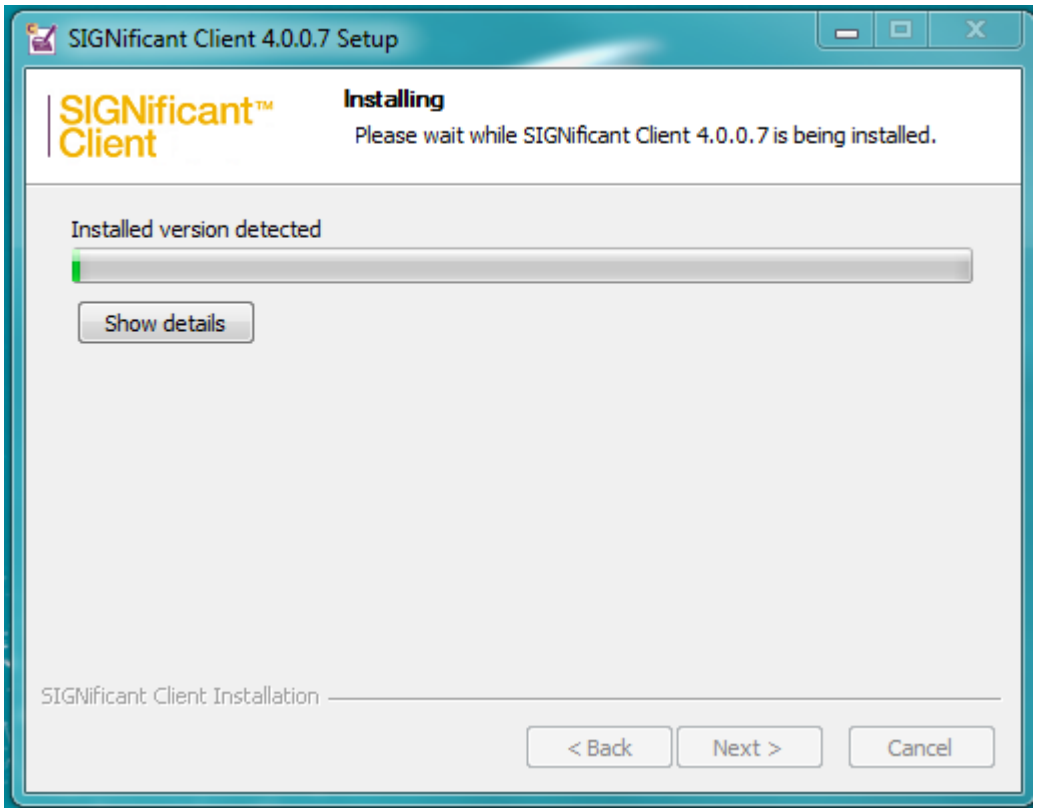
   c. Click **OK**.

8. Since version 4.x no manual tablet / pad selection is necessary anymore, because the tablets / signature pads are auto detected by the SIGNificant Client

9. Choose the library to use for PDF conversions and click **Install.**

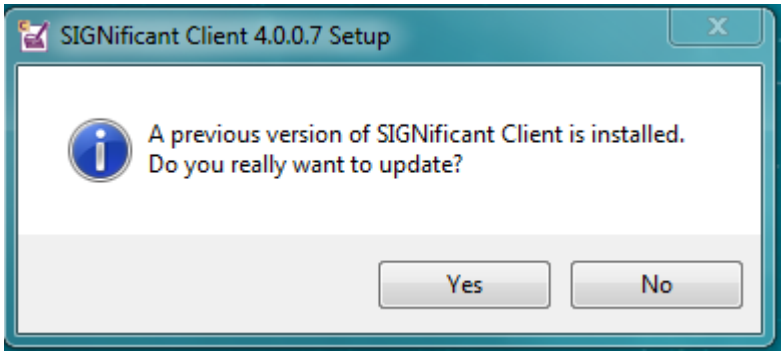


10. The **Installing** screen appears.



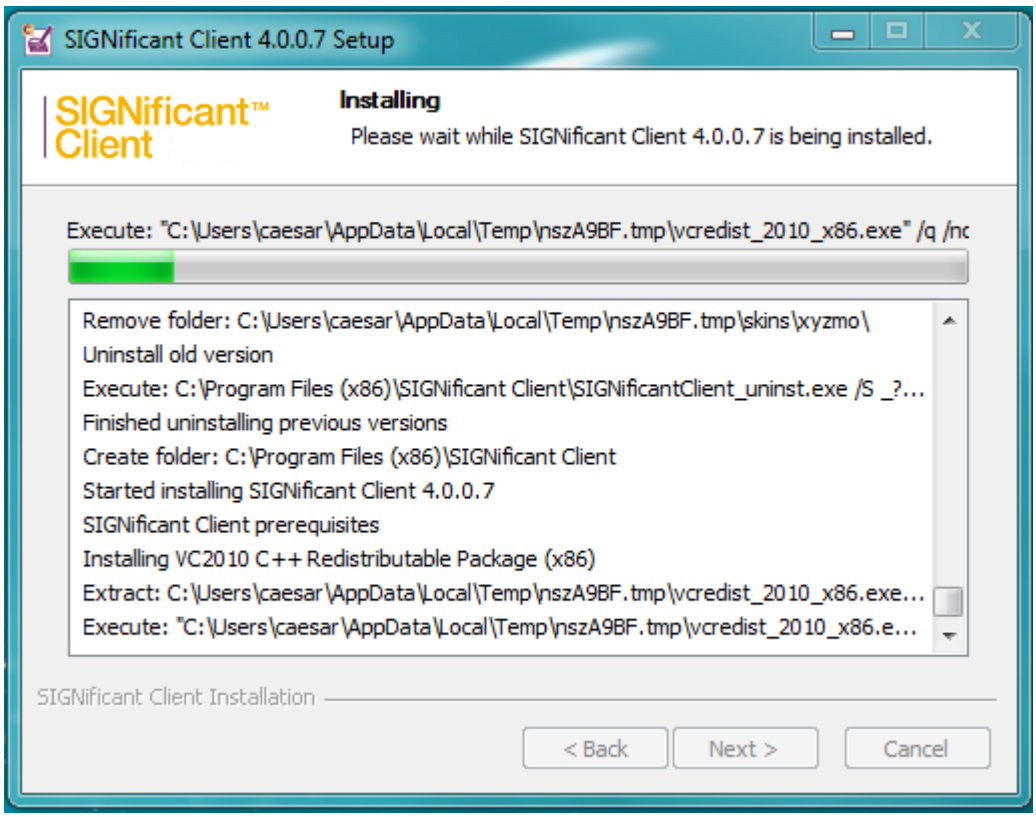
SIGNificant Client is installed. A progress bar tracks the installation process.

Note: If a previous version is installed, the system asks if you want to update it.

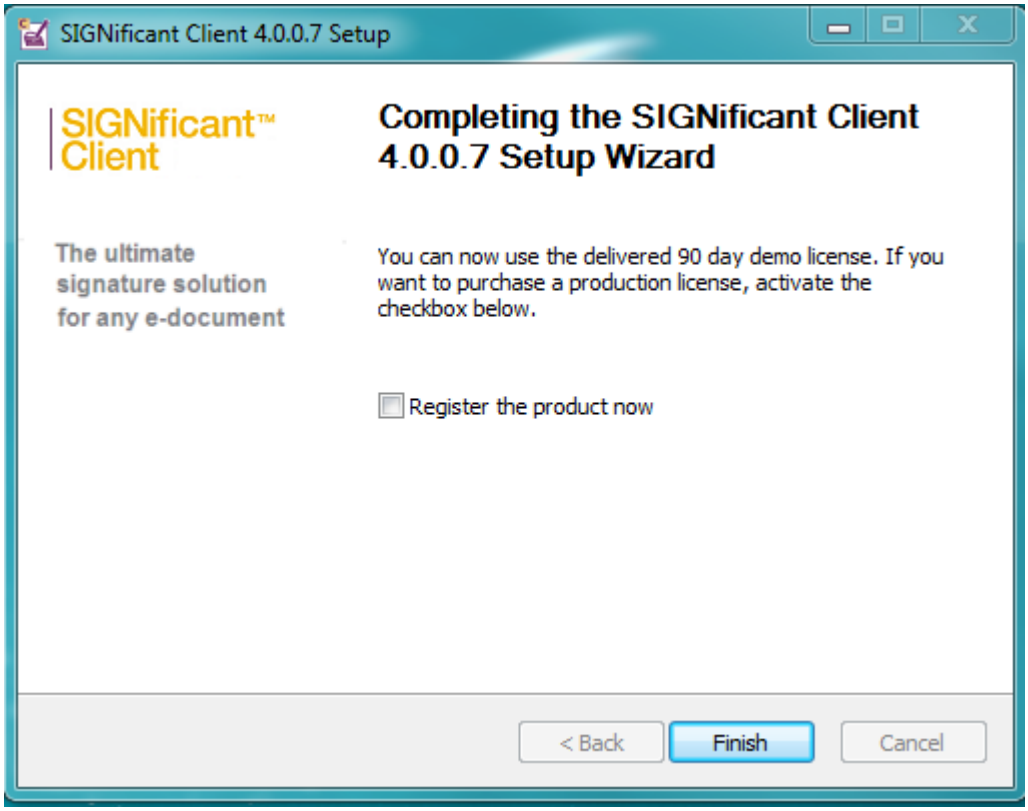


Click "Yes" to update or "No" to cancel the installation.

If desired, you can view installation details by clicking **Show details**.



At the end of the installation process, the **Completing the SIGNificant Client Setup Wizard** screen appears.

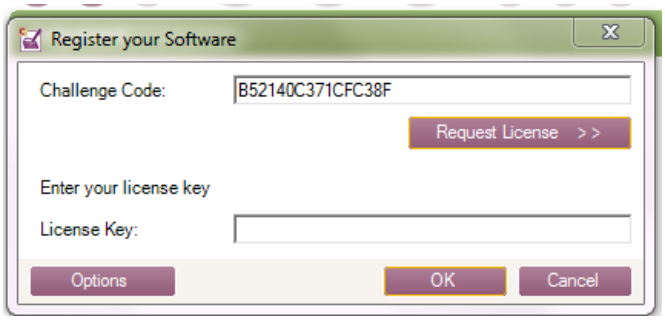


11. Click **Finish**.

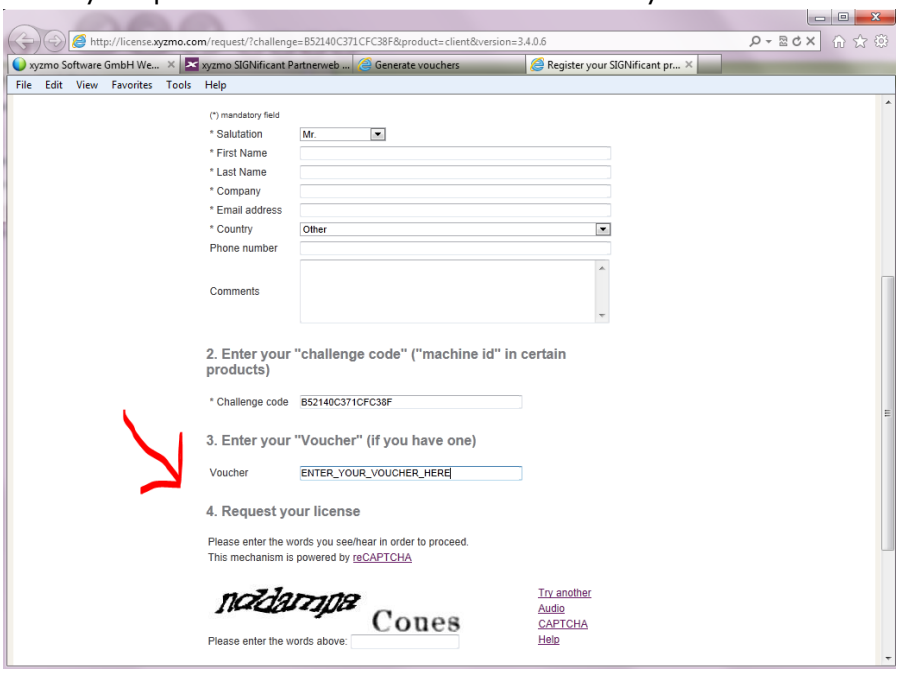
    The wizard closes.

Registering SIGNificant Client Software

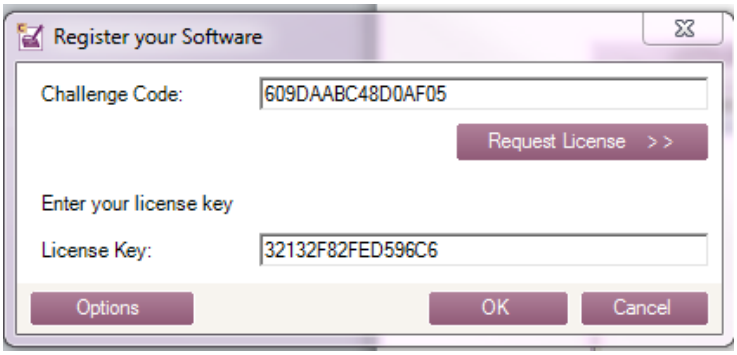
1. Open the program to request the license (under All Programs/SIGNificant/SIGNificant Client/Configure License)
2. Click on "Request License >>"



3. Enter your personal data and the voucher code you received



4. Finally, click on Request PRODUCTION license. The system will issue the license immediately for download.
5. Open the downloaded file (license.lic) with your text editor (i.e. Notepad) and copy the license key from this file to the Configure License Program (field "License Key").



6. Click on "OK".

Installing Certificates

In order to enable signers to use a certificate to digitally sign documents in SIGNificant Client, instead of or in addition to a signature tablet, you must install a certificate.

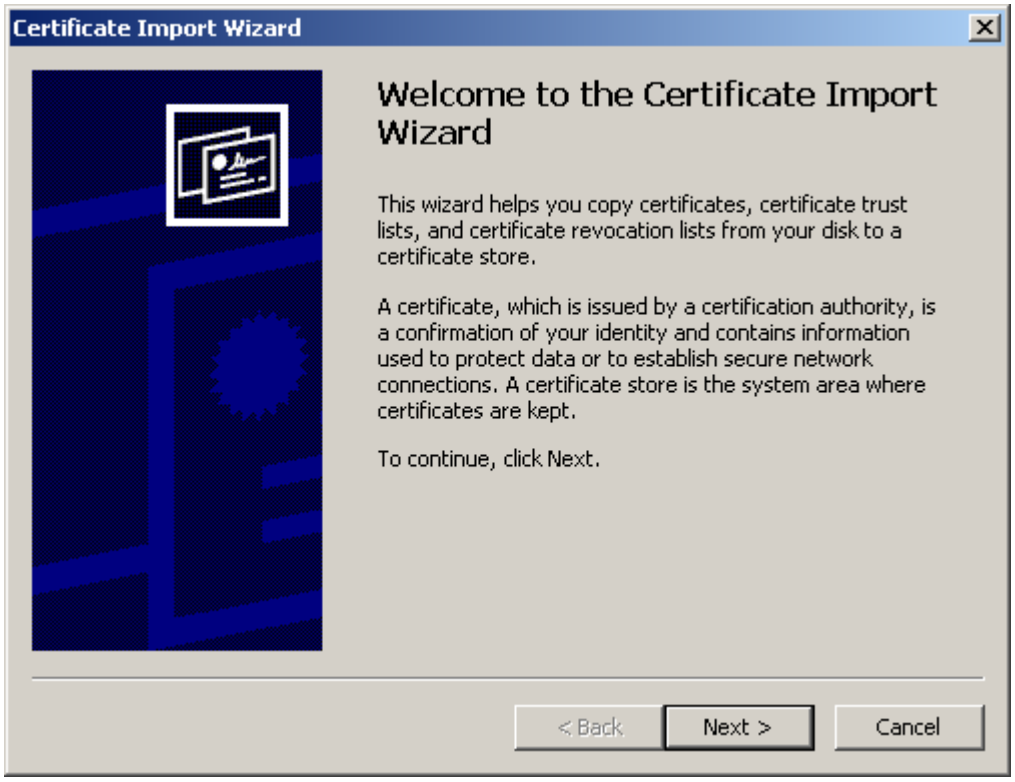
To install a certificate

1. Obtain a certificate from any certificate authority (CA) and store it on your computer.

   Note: If the desired certificate is located on a token or smartcard, you will need to install additional software. Contact the token or smartcard vendor for further information.

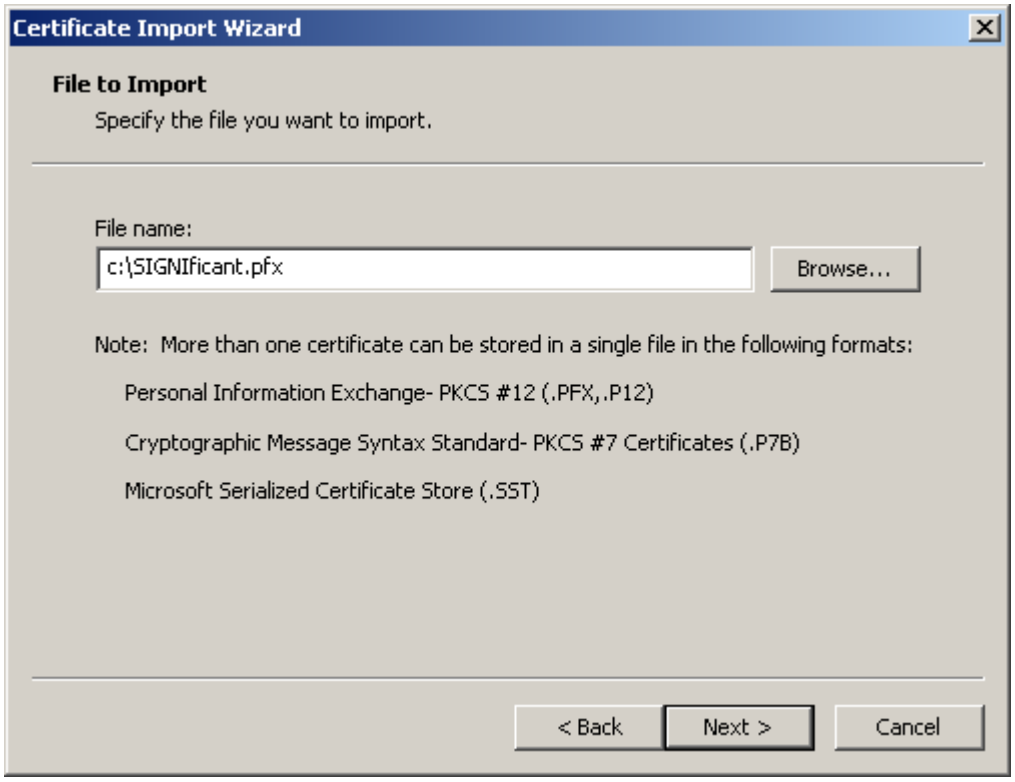
2. Double click on the certificate.

   The **Certificate Import Wizard** opens, displaying the **Welcome** screen.



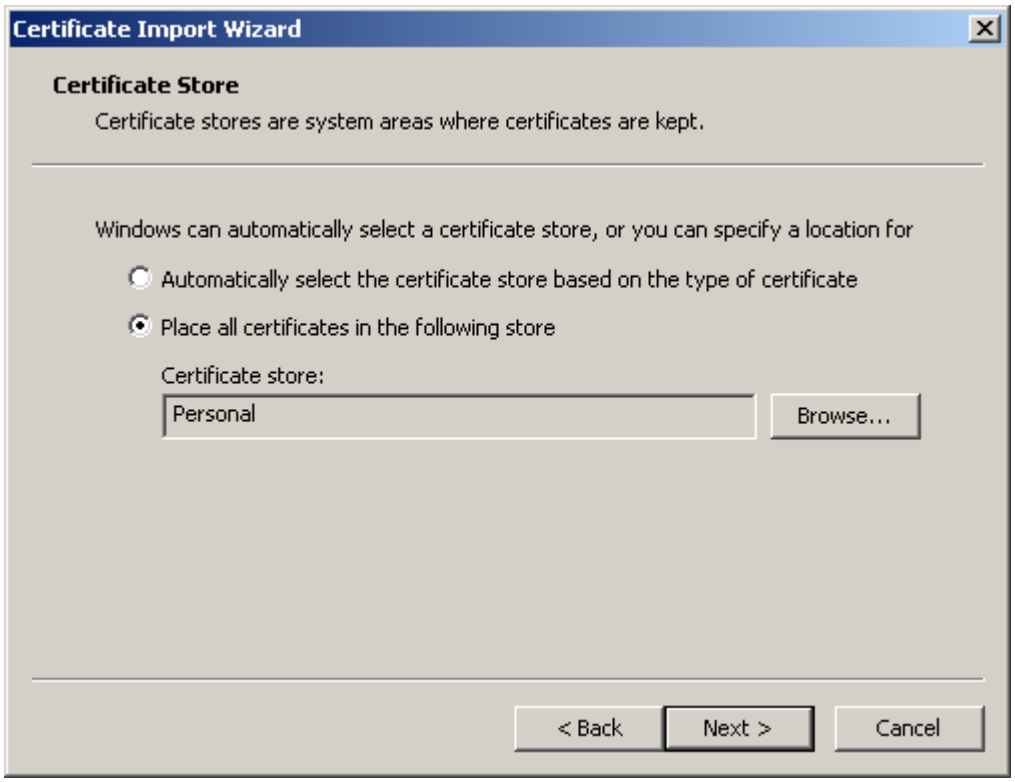
3. Click **Next**.

The **File to Import** dialog box appears.



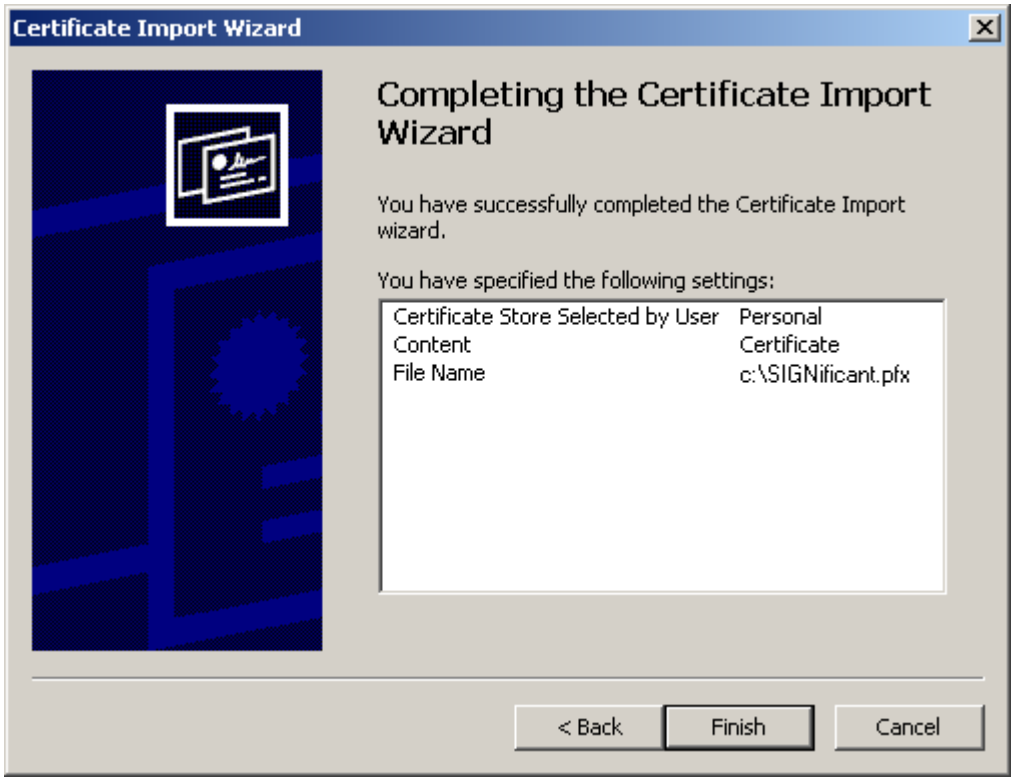
4. Click **Next**.

The **Certificate Store** dialog box appears.



5. Click **Place all certificates in the following store**.
6. Click the **Browse** button and click on the **Personal** certificate store.
7. Click **Next**.

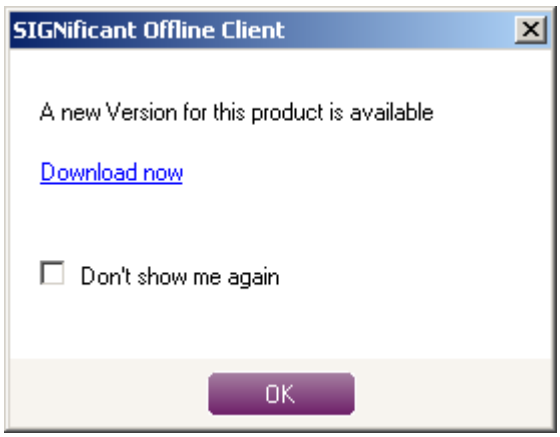
The **Completing the Certificate Import Wizard** dialog box appears.



8. Click **Finish**.
9. To check that you have installed the certificate successfully:
   a. In Internet Explorer, click **Tools > Internet Options**.
   b. Click the **Content** tab.
   c. Click **Certificates**.
   d. Click the **Trusted Root Certification Authorities** tab.
   e. Select the relevant certificate.
   f. Click **View**.
   g. Check that the information displayed is correct and that the certificate is valid.

Updating SIGNificant Client

If SIGNificant Client was installed by your company's network administrator, it may be configured to check for updates automatically. In this case, a dialog box may appear when you start SIGNificant Client, notifying you that a newer version of SIGNificant Client is available for download.



Do one of the following:

- To update SIGNificant Client, click **Download now**.
- To continue to SIGNificant Client without updating it, click **OK**.
- If you don't want to get this information anymore click on "Don't show me again." You may still look for updates by clicking on **MENU – Help – Check for updates**

Uninstalling SIGNificant Client

To uninstall SIGNificant Client

1. In the START menu, click **Control Panel**.
2. Double click **Add or Remove Programs**.

   The **Add or Remove Programs** window opens.
3. Select **SIGNificant Client**.

4. Click **Change/Remove**.

   A confirmation message appears.
5. Click **Yes**.

   SIGNificant Client is uninstalled.

   A success message appears.
6. Click **OK**.

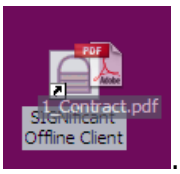
Getting Started with SIGNificant Client

This chapter introduces the SIGNificant Client interface.

Accessing SIGNificant Client

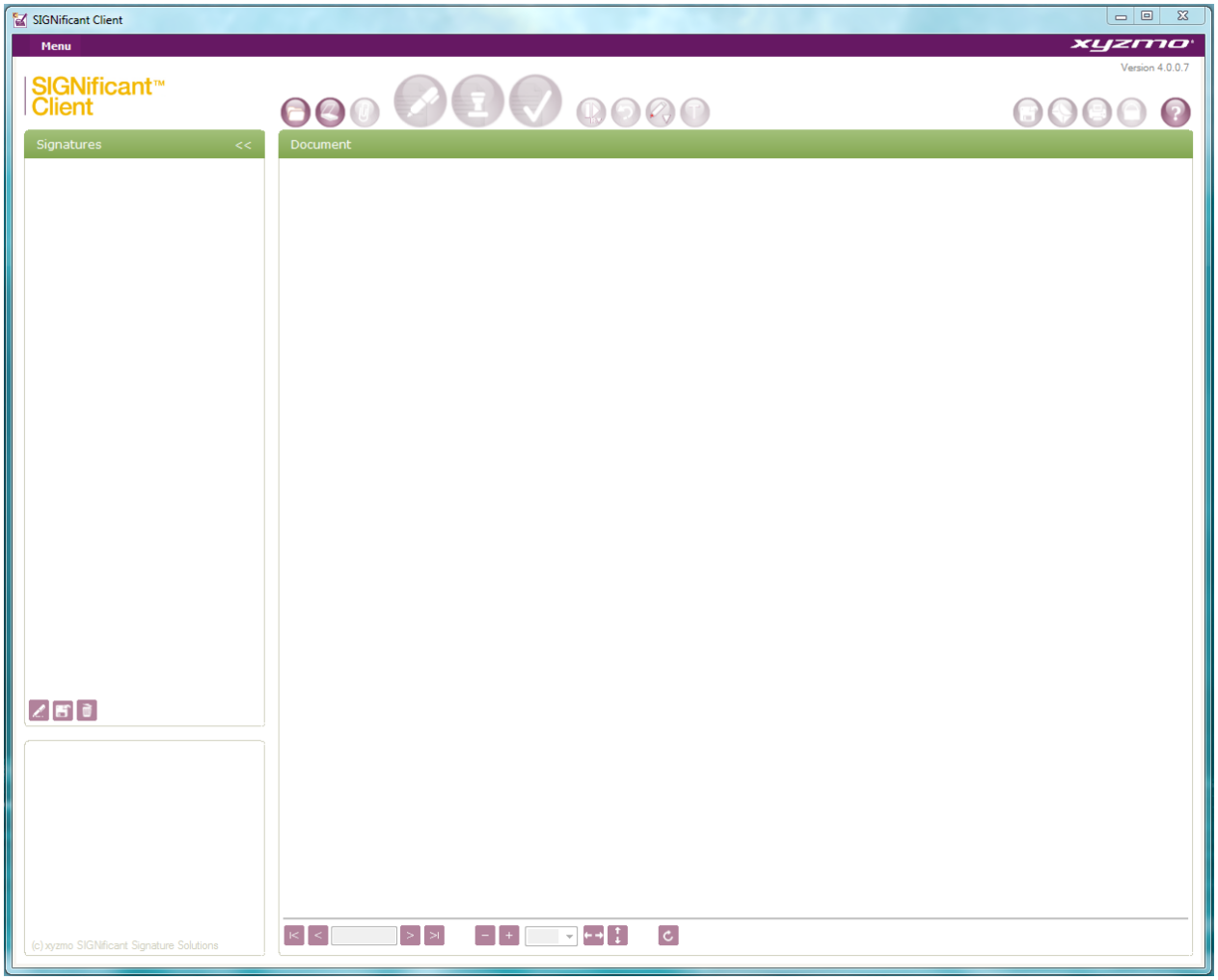
To access SIGNificant Client

- Do one of the following:
  - If you have installed a desktop shortcut, click

on your desktop.
  - Or simply choose a PDF document and drag-and-drop it over the icon 

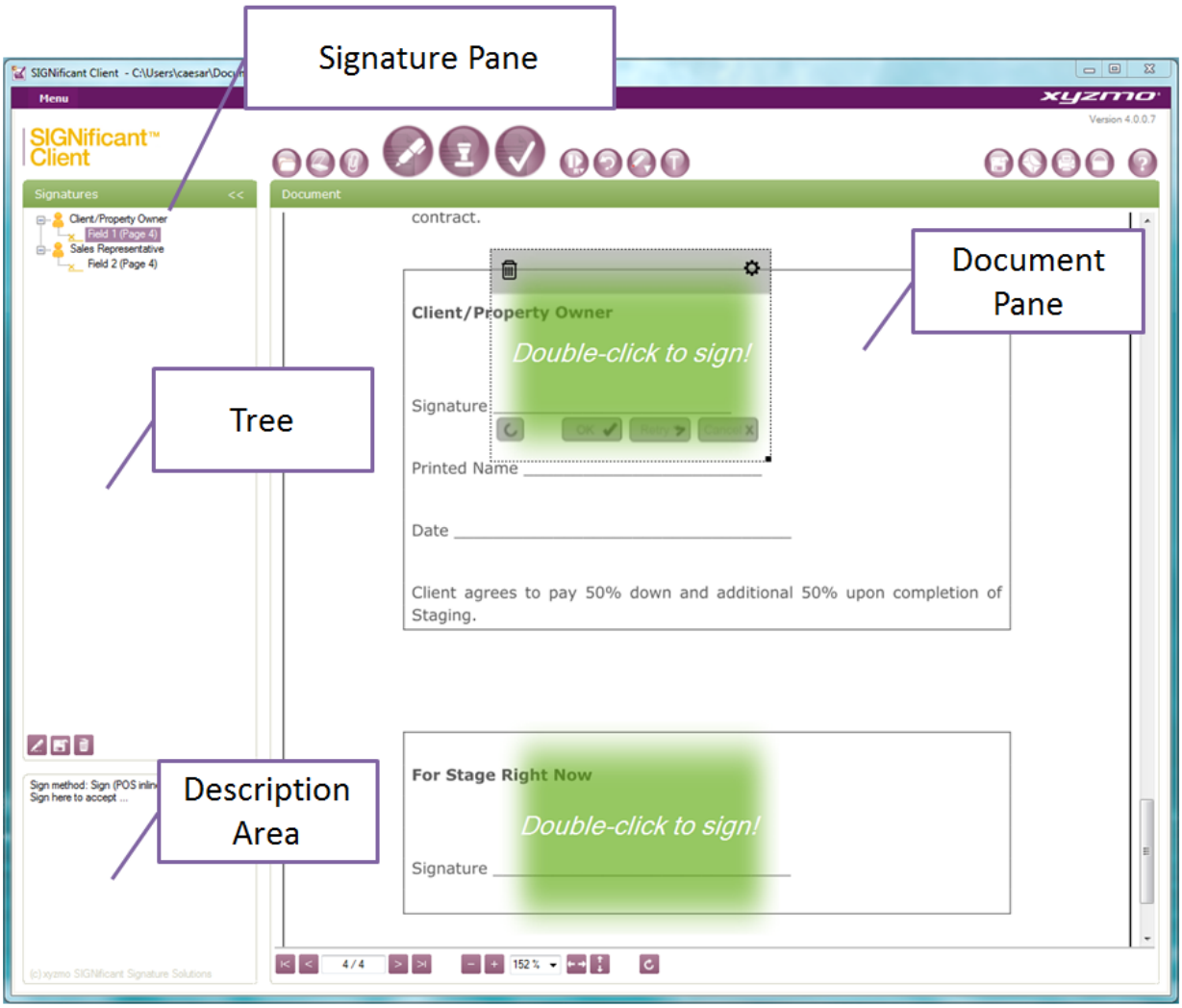
. The Client will open with the PDF document.
  - If you have installed a Quick Launch shortcut, click on your Quick Launch / Task bar.
  - In the START menu, click **All Programs > SIGNificant > SIGNificant Client**.

The SIGNificant Client main screen appears.



Note: There are many possibilities for configuring the appearance and functionality of the SIGNificant Client. Your interface may look quite different from the picture above, because your company has decided to use a different customization for the interface or the functionalities. Please contact your helpdesk in this case.

Using the SIGNificant Client Interface



The SIGNificant Client interface consists of the following major elements:

- **Signatures Pane.** The Signatures Pane allows working with signers and signature fields in the currently open document. It includes the following:
  - **Tree.** The tree displays all defined signers and signature fields for the current document. See *Using the Tree* on page 21.
  - **Description Area.** The description area displays information about the signer or signature field that is selected in the tree. See *Using the Description Area* on page 22.
- **Document Pane.** The Document Pane displays the currently open document and enables you to navigate around the document's pages. See *Navigating the Document* on page 22.

Using the Tree

Tree nodes that represent a signer can be expanded to reveal the signer's signature fields or collapsed to occupy less space.

To expand a node

- Click the ⊞ icon next to the node.

  The node is expanded.

To collapse a node

- Click the ⊟ icon next to the node.

  The node is collapsed.

In addition, each node in the tree is marked with one of the following icons:

Table 2: Tree Icons

When this icon...	Appears next to a signer, it indicates that...	And when it appears next to a signature field, it indicates that...
	The signer has not yet signed the document.	The signature field has not yet been signed.
	The signer has signed the document.	The signature field has been signed.

Using the Description Area

To use the Description Area

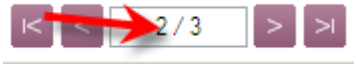
- In the tree, click on the signer or signature field whose information you want to view.

  If you click on a signer, the Description Area displays the selected signing method for the signer. If biometric authentication is selected for the signer, this information is displayed as well.

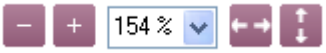
  If you click on a signature field, the Description Area displays the signature field's description.

Using the Document Pane

To navigate a document

- In the Document Pane, do any of the following:
  - To view the next page, click .
  - To view the previous page, click .
  - To view the first page, click .
  - To view the last page, click .
  - To jump to a specific page, type the desired page number in the field provided at the bottom of the pane and press **ENTER**. 

To zoom the document

- In the Document pane, use these buttons to zoom: 
    - With + / - and the dropdown menu, you can choose a zoom level.
    - With ← → you use the whole width of the Document Pane.
    - With you move through the document by whole pages.

To rotate the document

Because the document is changed and therefore the signature can be broken when the document is rotated, only unsigned documents may be rotated.

- In the Document pane, use this button:
    - The document is rotated clockwise by 90°.

Opening Documents

SIGNificant Client supports opening PDF files only.

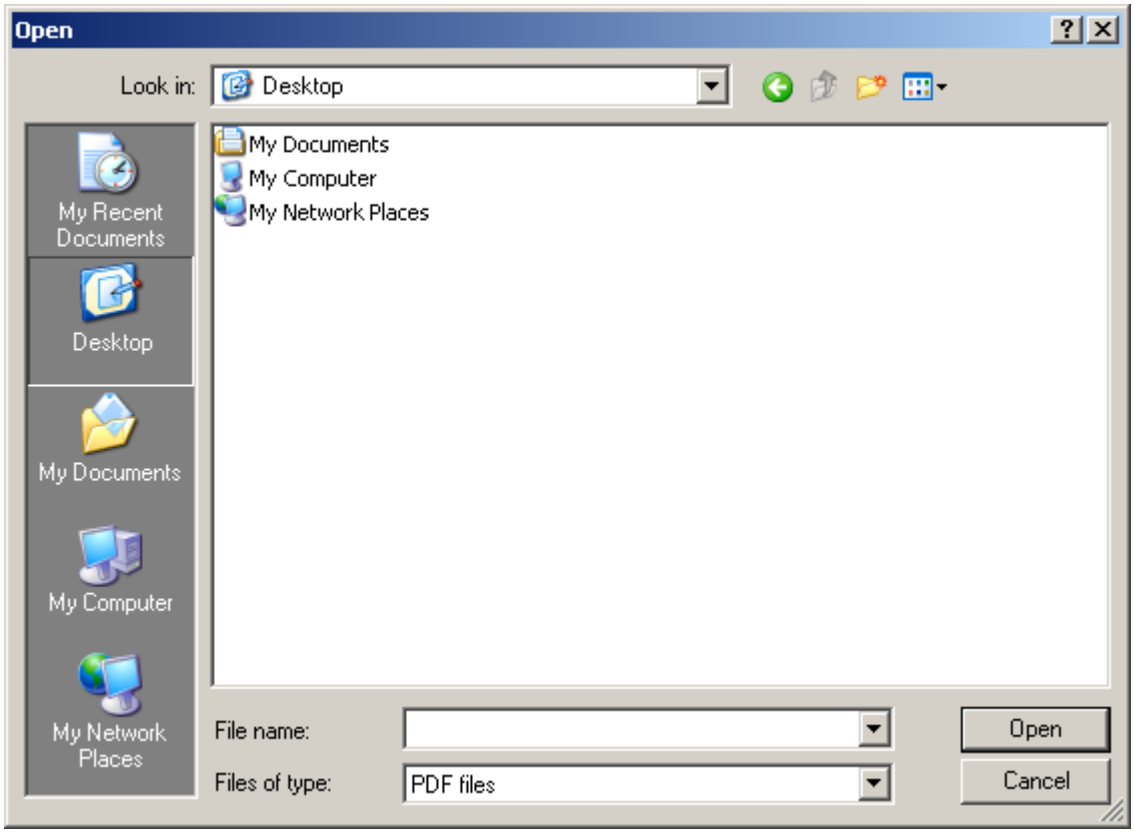
The other way is to open files from any TWAIN interface (e.g., scanner, webcam, or other hardware driver).

Note: You can convert any document to a PDF document and open in automatically in the SIGNificant Client via the SIGNificant Client printer. See next chapter.

To open a document via the Open button

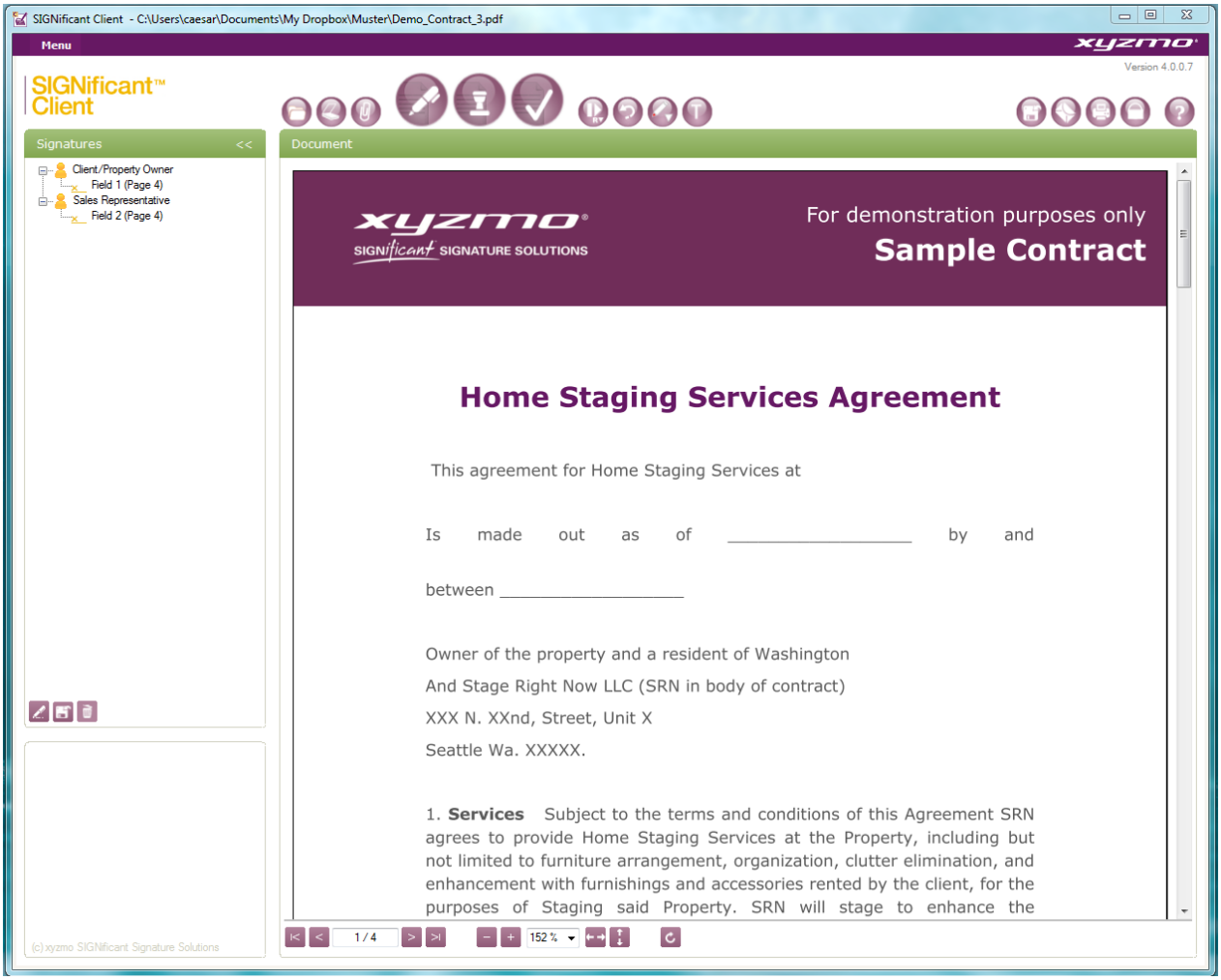
1. Click .

   The **Open** dialog box opens.



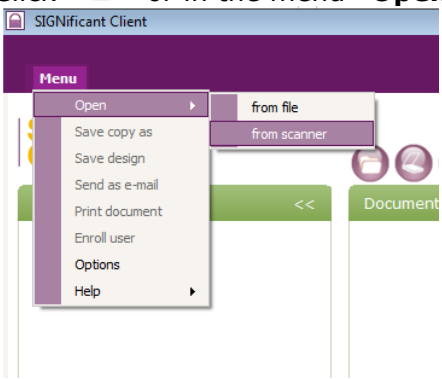
2. Browse to the desired document.
3. Click **Open**.

The document opens in SIGNificant Client.

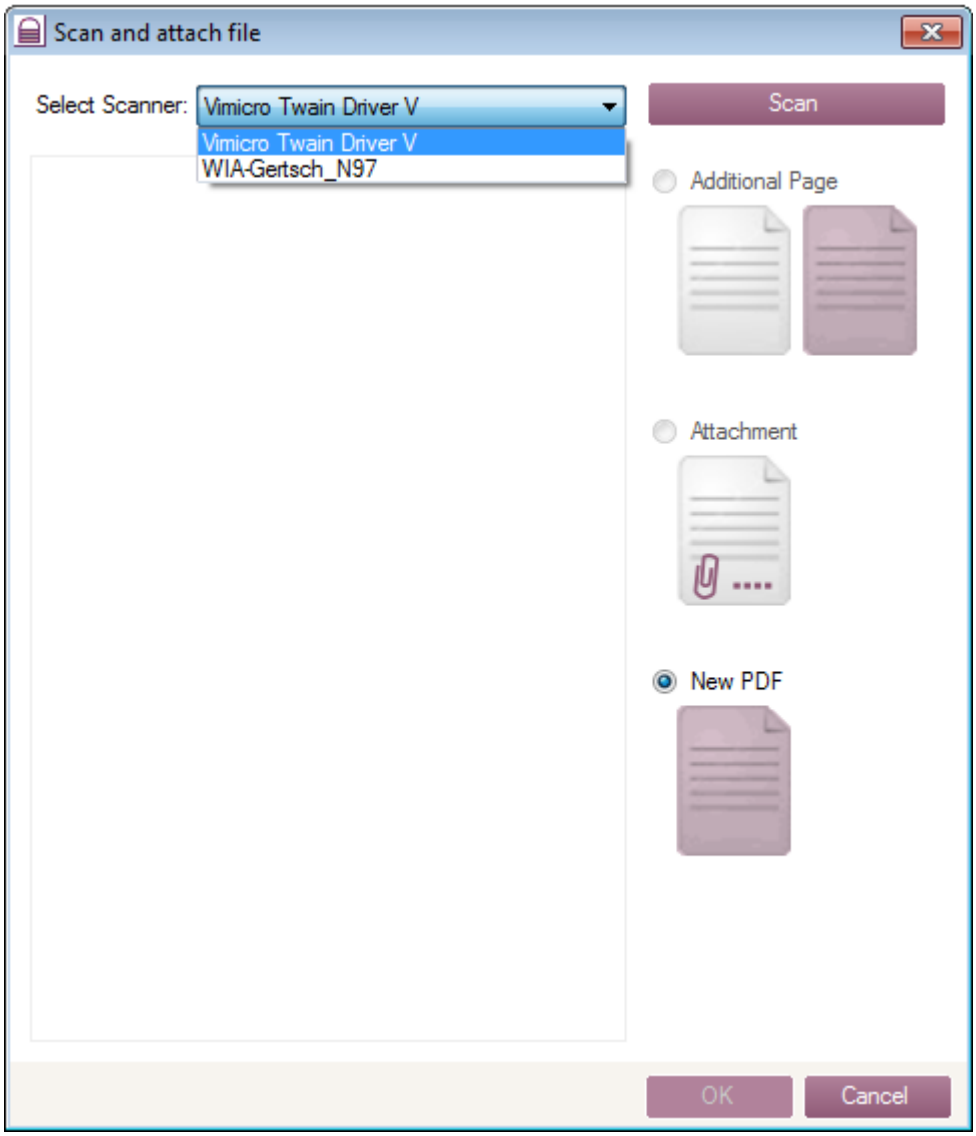


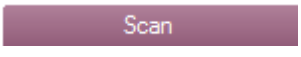
To open a document via scanning

1. Click or in the menu **"Open > From scanner.**"

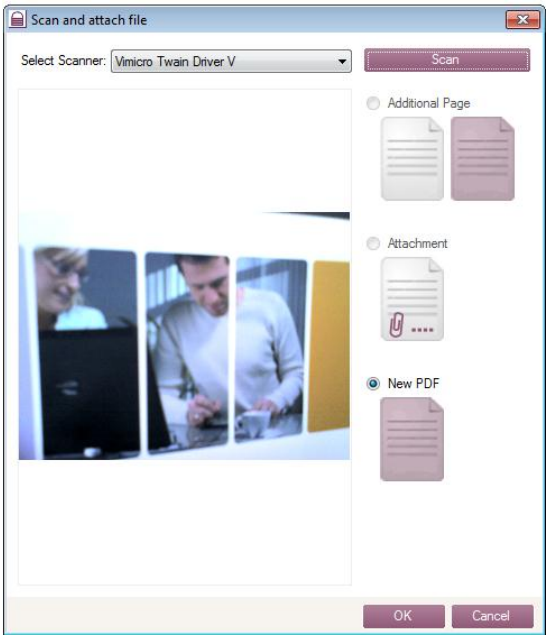


2. In the dialog box, select your TWAIN source, e.g., a scanner.



3. Click  .

4. After your scanner's dialog, the scanned information appears as a preview in the dialog box.

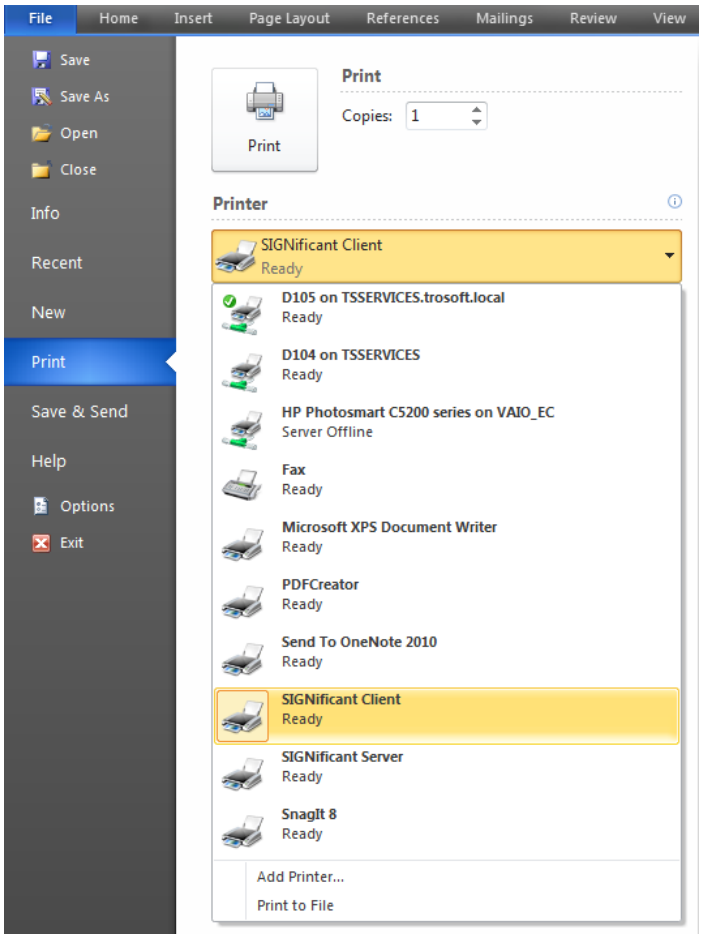


5. Click OK. The scanned information appears as a new document in the SIGNificant Client.

Using the SIGNificant Client Printer

You can convert nearly any document to a PDF document and open it automatically in the SIGNificant Client using the SIGNificant Client Printer. This is a very easy way to integrate the SIGNificant Client into your actual process and use it together with nearly any other application.

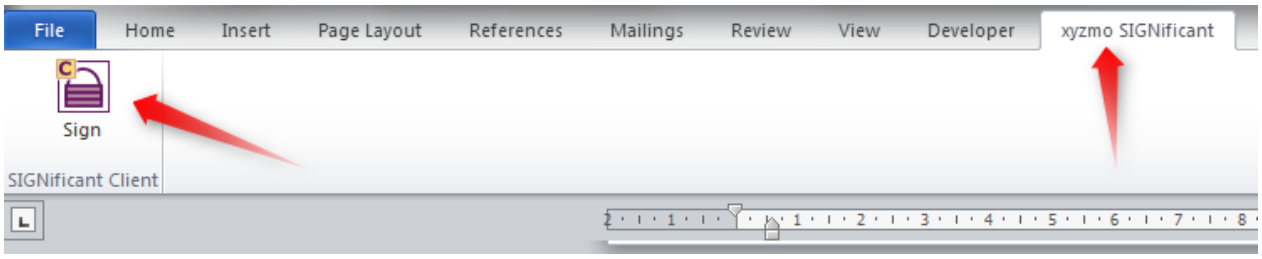
If you have a document in another application that you want to convert into a PDF file and sign or stamp with the SIGNificant Client, just use the **Print** command within the application:



Under **Printer**, choose the SIGNificant Client; your document will be converted into a PDF document and the SIGNificant Client will open automatically with the document.

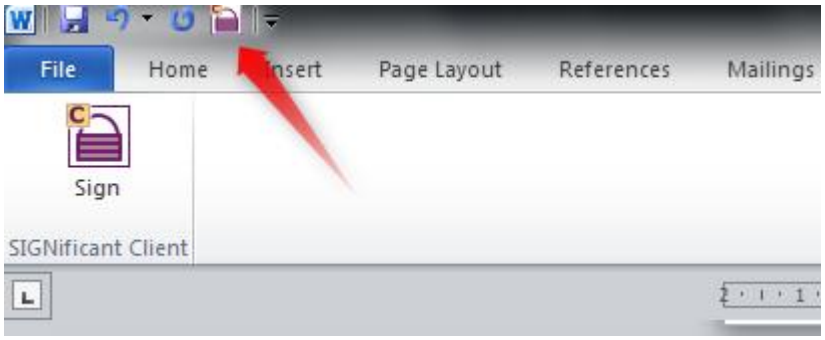
MS Office 2007/2010 Plugin

The MS Office Plugin (which is an optional part of the Client installation) enables you to convert Office-formatted files directly from an Office application and load them into the SIGNificant Client. Only one click is needed, and you can easily sign and seal your PDF document.



Just press the **Sign** button in from within the opened document, and your Microsoft Office file will be converted and uploaded to SIGNificant Client.

To use this plugin a little more easily, users may add it to the Quick Launch Bar, making the plugin accessible with just one click.



SIGNificant Client Office Plugin allows users to parse signature strings when uploading documents to SIGNificant Client and access all other features that are integrated into the SIGNificant Client Printer.

Verifying Documents

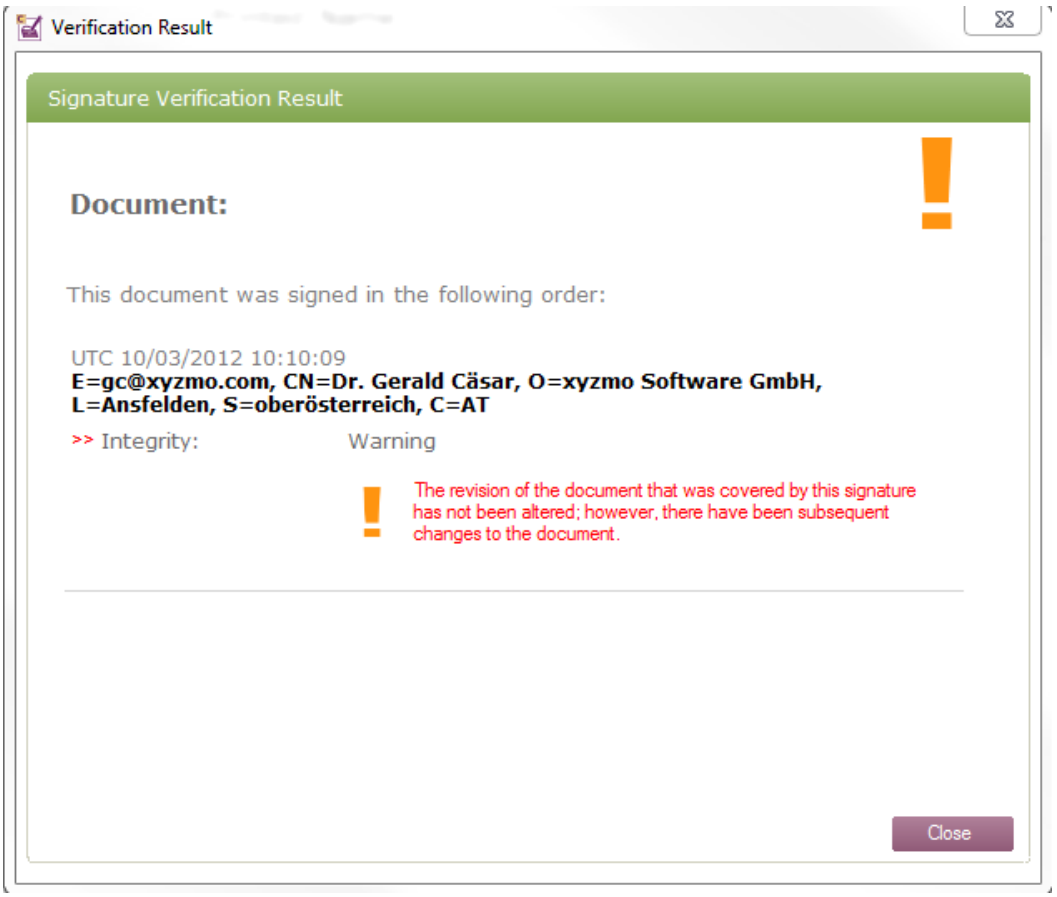
When you receive / open a signed document, you can verify its integrity before you sign it. The revocation status of the certificate itself is not checked, because this would require always an internet connection.

To verify a document:

1. Click .

2. Read through the verification result.

   If there is more than 1 signature, the signature on top is the latest one and the only one that can be valid (as signing a document means changing the document).



3. Click on **Close** in order to proceed with your own signature.

Enrolling a biometric profile

SIGNificant Client can work in conjunction with SIGNificant Biometric Server. A person's signature can be compared with a stored biometric profile on the server using parameters of pressure, acceleration, speed, rhythm, and movements in the air. With this feature, you can prevent unauthorized users from signing a document.

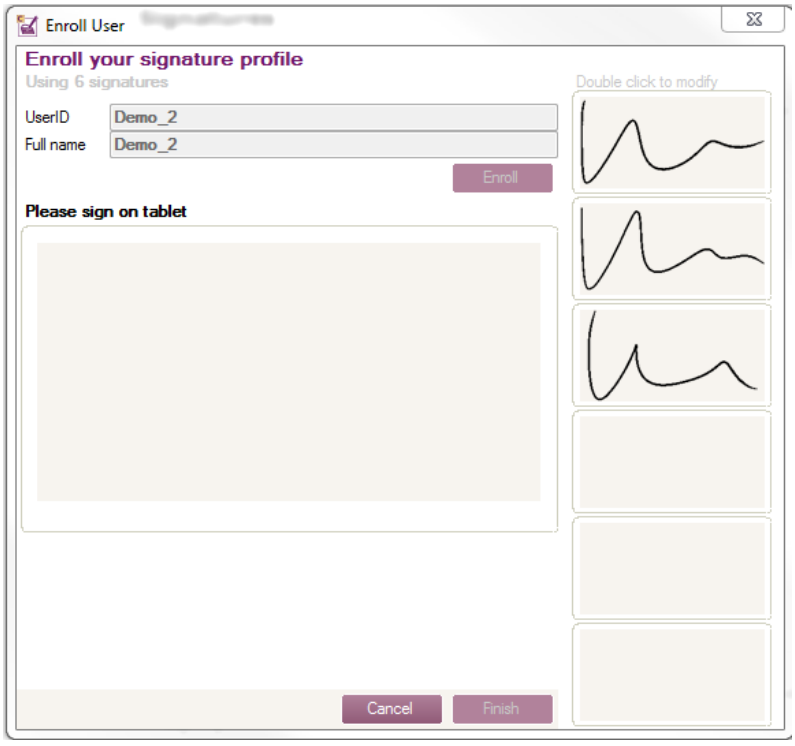
In order to enable biometric authentication, the person must first enroll his or her biometric profile on the SIGNificant Biometric Server.

When you have access to a SIGNificant Biometric Server – in the default installation you access the test lab of xyzmo - and it is configured correctly, SIGNificant Client provides the possibility of enrolling your biometric profile. For more information on configuring SIGNificant Client to connect to a Biometric Server, please read *Biometric Profiles* in the *SIGNificant Client AdminGuide.*

Note: For this feature, internet or network connection is required.

To enroll your biometric profile:

1. Click on **MENU** and then on **enroll user.**
2. The **Enroll** dialog box appears. Enter your user name and click **Enroll**.
3. Sign six times on your tablet. After that the signatures are checked if the make up for a useful profile. If not you might have to reapeat some signatures.



Click **Finish** to finish enrollment.

Designing Documents

This chapter explains how to design documents.

Note: The SIGNificant Client administrator may choose to disable the option of designing documents for security reasons. In this case, the relevant buttons will be disabled, and you should skip to the next chapter in this guide.

Designing Documents in SIGNificant Client

Designing a document in SIGNificant Client involves specifying the following:

- Which users are the signers who must sign the document
- Where the signatures should be located
- What signing method to use for each signer
- Whether the signatures must be biometrically authenticated
- A description for the signer

To design a document

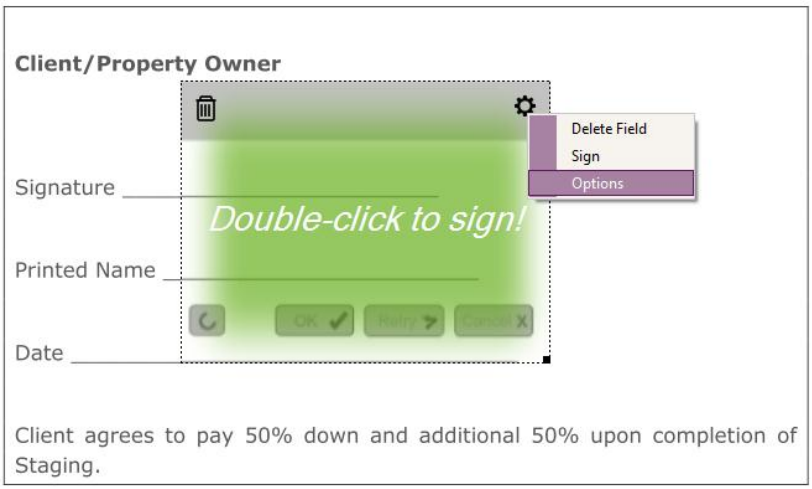
1. Open the desired document.
   See *Opening Documents* on page 24.
2. Add each signer who should sign the document.
   See *Adding Signers* on page 36.
3. Add one or more signature fields for each signer.
   See *Adding Signature Fields* on page.
4. (Optional) Remove signers as needed.
   See *Removing Signers* on page 38.
5. (Optional) Remove signature fields as needed.
   See *Removing Signature Fields* on page 38.
6. (Optional) Save the document.
   See *Saving Documents* on page 67.

Adding Signers and Fields

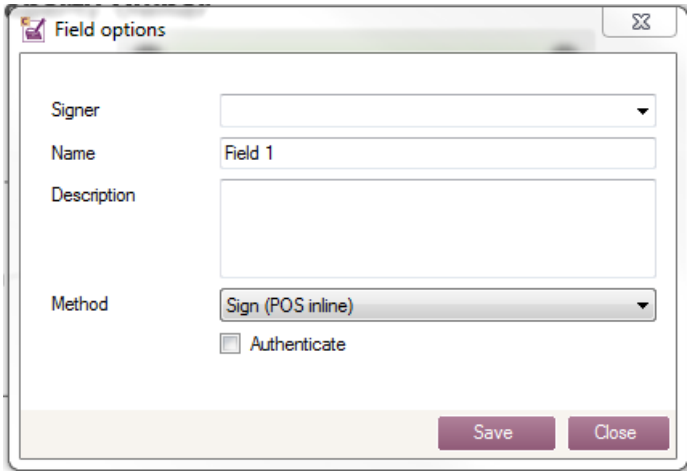
To add a signer

1. Click .

   A signature box appears on the document

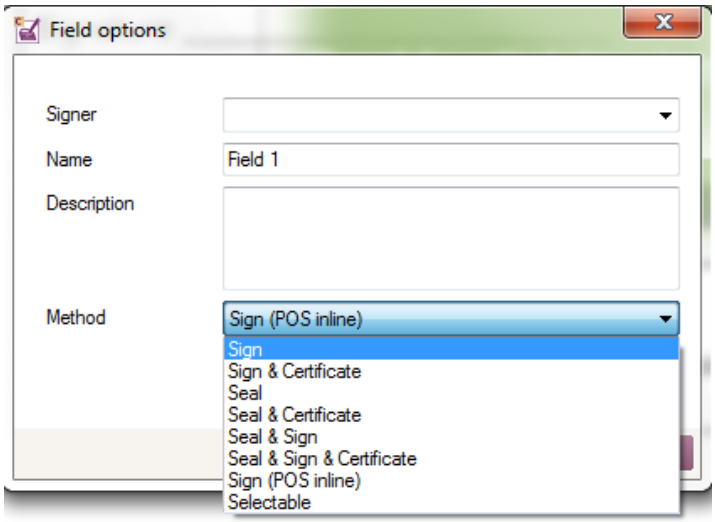


   The **Field options** dialog box opens appears when you click on the "cog" icon.



2. In the **Signer** field, do one of the following:
   - To specify a new signer, type the signer's name.
   - To specify a signer whom you've already added, select the signer's name from the dropdown list.
3. In the **Name** field, specify a new field name , e.g. "SignField123"
4. (Optional) In the **Description** field, type a free text description of the signature.

   For example, "Please sign this document immediately." If you use the appropriate signature tablets, this text will be shown on the LCD display of the signature tablet, while signing.
5. In the **Method** dropdown list, specify which signing method the signer can use to sign the document.



If you select **Selectable**, the signer will be able to choose the signing method.

6. (Optional) To specify that the signer's signature should be authenticated biometrically, select the **Authenticate** check box.

Important: If you select this option, the signer's signature must be enrolled in the SIGNificant Biometric Server before signing the document, and the name specified in the **Signer** field must be *identical* to the signer's username in the SIGNificant Biometric Server; otherwise, document signing will fail. For information on enrolling signatures, refer to the section *Enrolling a Biometric Profile*.

---

7. Do one of the following:

   - To save the signer and field configuration and return to the SIGNificant Client main screen, click **Save**.
   - To save the signer and configure another signer, click **Save and** .
   - To close the dialog box without saving the signer, click **Close**.

   The signer appears in the signer tree.

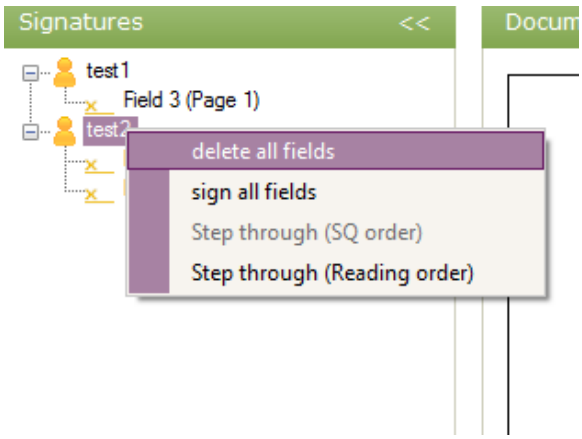
The signature field appears in the signature tree, under the signer. In addition, the signature field appears at the top of the document.

8. Drag the signature field to the desired location in the document.
9. Add additional signature fields if required.

Removing Signers

To remove a signer

- In the signer tree, do one of the following:
  - Right-click on the desired signer, and click **delete all field** in the pop-up menu that appears.



  - Click on the desired signer, then click "delete all fields".

The signer and all of the signer's signature fields are removed from the tree and from the document.

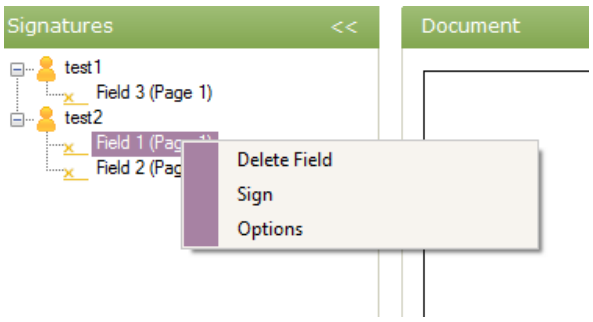
Removing Signature Fields

Note: If you remove a signature field that is the only signature field for a signer, the signer will be removed as well.

Note: Only unsigned signature fields can be removed. If you would like to remove a signed field, you must clear the signature first.

To remove a signature field

- In the signer tree, do one of the following:
  - Right-click on the desired signature field, and click **Delete Field** in the pop-up menu that appears.



  - Click on the desired signature field, then click "delete field".

The signature field is removed from the tree and from the document. If it was the only signature field for the signer, the signer is also removed from the tree.

Saving the Design

You can save open documents at any stage, whether they are currently being designed or are partially signed.

Note: Once you have saved a document, no further changes can be made to the document design; however, signers can continue signing the document.

To save a document

1. Click .

   The **Save As** dialog box opens.
2. Browse to the desired directory.
3. Type the desired file name.
4. Click **Save**.

   The document is saved.

Designing Documents in Other Programs

If desired, you can design a document in a different program, convert it to PDF format, e.g., with the SIGNificant Client Printer, and then open it in SIGNificant Client.

Note: You can only design text-based documents, such as Word documents.

Designing a document outside of SIGNificant Client involves specifying the following:

- Which users must sign the document
- Where the signatures should be located
- The signature's description
- Whether the signatures must be biometrically authenticated

Note: When this method of designing documents is used, the signing method is by default set to "Selectable"; that is, the signer will be able to choose whether to sign using a tablet, certificate, or both.

To design a document

1. Open the desired document in the relevant program, like Microsoft Word.
2. In each location where a signature field should appear in the PDF, insert a signature string in the document.

- Build the signature string using the relevant fields in *Signature String Fields* on page 40. The fields must be separated by commas, and the entire signature string must be enclosed in *accent marks*.

  Note: The signature string must be in one of the following fonts: any Base14 font, Arial, Courier, Courier-Bold, Courier-Oblique, Courier-BoldOblique, Helvetica, Helvetica-Bold, Helvetica-Oblique, Helvetica-BoldOblique, Times-Roman, Times-Bold, Times-Italic, Times-BoldItalic, Symbol, or ZapfDingbats.

  For example, the following signature string creates a signature field for user JohnS to sign.

  ```
  `sig,fd=Please sign this document, uid=JohnS, bio=1`
  ```

  The signature will be biometrically authenticated.

3. Print the document to the installed SIGNificant Client printer. To do so, select the SIGNificant Client printer in the **Print** dialog box.

   The following things happen:

   - The document is converted to PDF format.
   - The signature strings that you inserted during the design process are replaced by signature fields.
   - SIGNificant Client opens, displaying the document.

Table 3: Signature String Fields

Field	Description	Example
`sig`	Creates a signature field in the PDF. This field is mandatory.	sig
`fd`	A free text description of the signature. The description cannot contain commas. After document circulation, the specified description will appear in the SIGNificant Client **Description** area. This field is optional.	fd=Please sign this document
`uid`	Indicates the signer's user ID. This field is optional.	uid=JohnS
`bio`	Indicates whether biometric authentication is required for this signature. This can have the following values: • `0`. Biometric authentication is not required. • `1`. Biometric authentication is required. The default value is 0. This field is optional.	bio=1
`sq`	Indicates the order for signing the signature fields in the documents. For instance, if there are three signature fields with sq 1 to 3, SIGNificant Client allows stepping through the signature fields in the given order.	sq=3
`ck` / `ckv`	Defines a custom field for the signature. You can use up to three custom fields and fill them with prefilled values. If you want to add additional comments to your signature, use the Custom Key field. ck defines the name of the custom key and ckv defines the value for the ck-field. ckv is optional. If it is not given, the user must enter it in the signing dialog in SIGNificant Client. The ck and ckv fields must be numerated.	ck1=mykey, ckv1=myvalue

sm	Defines the signing method for this signature field. This can have the following values: • Ask (default): If you do not want to use a special signing method, set Ask or just leave this field empty. • Tablet: sign with tablet • Tablet_and_Certificate: Sign with tablet and certificate • Stamp: only seal the document • Stamp_and_certificate: seal the document with a personal certificate • Stamp_and_tablet: Sign and seal the document • Stamp_and_tablet_and_certificate: Sign, seal, and include a personal certificate in the signature • Tabletpos: Use POS-dialog to sign • TabletPosInline: Use inline signing	sm=Tablet
signimg	The name of the signing background image that is shown on an LCD tablet when signing is active. If the image is not present, the default image is used. Note that this must present separately for every tablet in the dedicated images directory.	signimg=sign_form1.bmp
ly	Define the signature layout, which is defined in the SignatureLayout.xml	Ly=mylayout
fna	Defines the „Signature Field" name, e.g. SignField123	fna=SignField1213

Note: You need a biometric server to use biometric authentication.

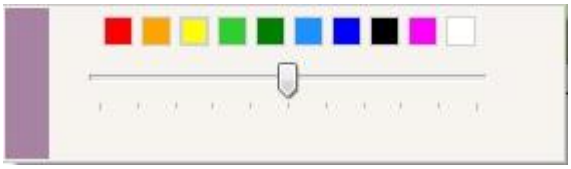
Additional Features for Documents

This chapter explains how to add handwritten or text annotations. Additionally, it is possible to fill PDF forms with the Client. Users should be aware that documents that are already signed cannot be edited with these features.

Handwritten Annotations

To add handwritten annotations, open the document in SIGNificant Client and click on the **Handwritten Annotations** button.

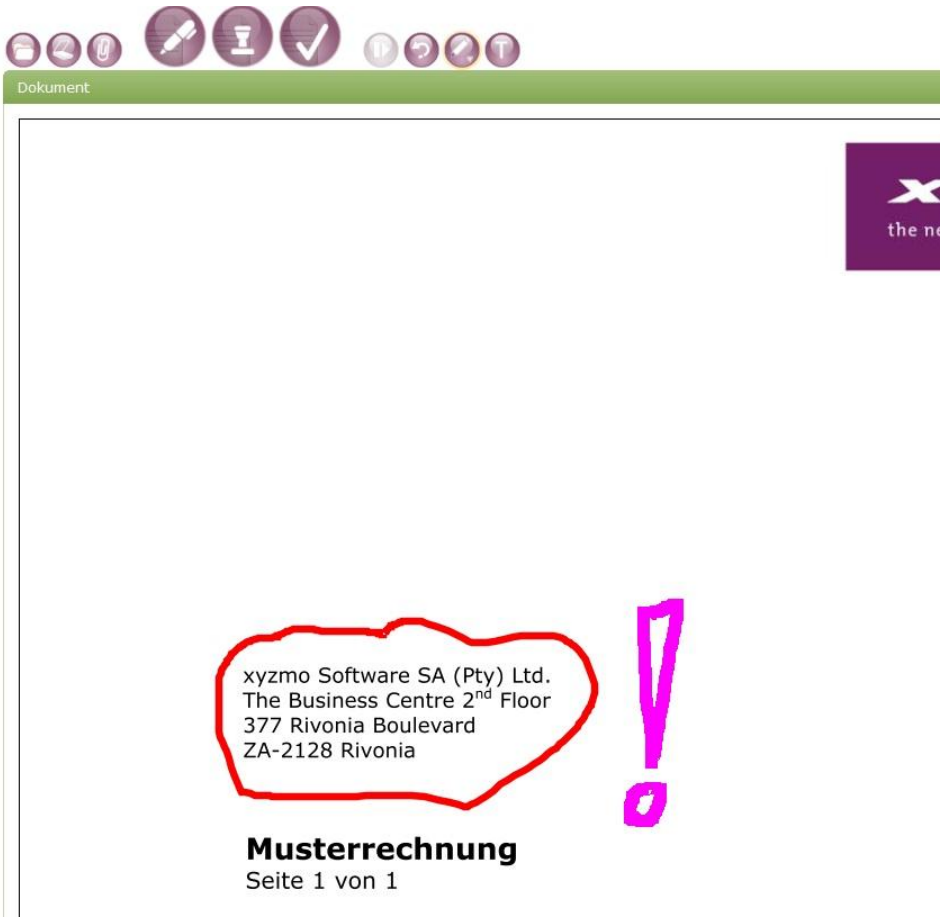
A menu appears:



In this menu, the user can choose the color for the handwritten annotations and, using the slider, the thickness of the drawing pencil.

SIGNificant Client goes into Annotation mode and stays there as long as the user doesn't click another button or change to another mode, e.g. signing, text annotations, etc.

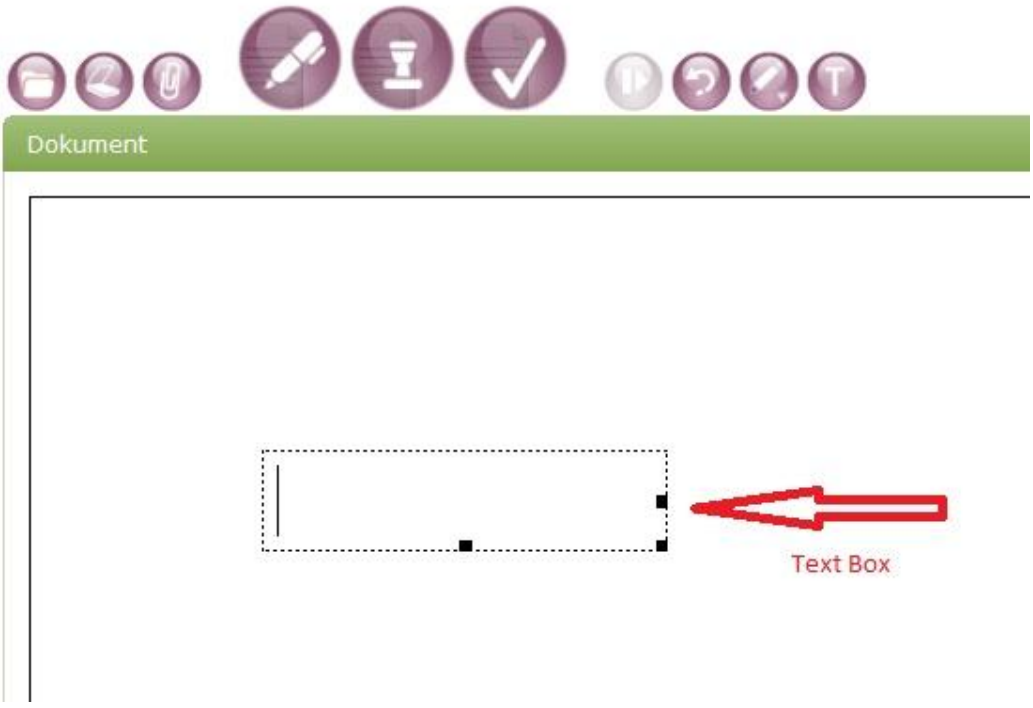
User is now able to draw with the mouse in a freehand mode within the document.



Text Annotations

Additionally users can add text annotations. Text is added within a text box style tool.

Clicking the button; a text box appears. The user can resize or remove the box by moving the mouse over the black border markers.



Afterwards, the user can add text by typing it into the box. Once the text is entered, click outside the box; the SIGNificant Client leaves text annotation mode. To add another box, click the button again.

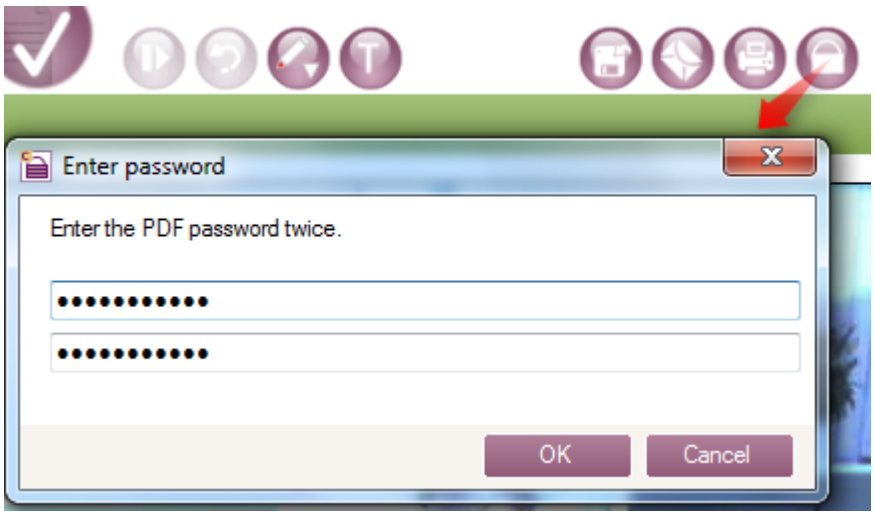
Form Filling

SIGNificant Client is able to allow the user to fill out form fields in PDF. Simply click on the fields to fill.

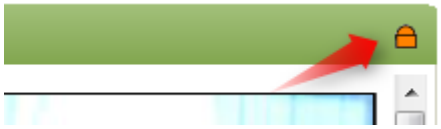
NOTE: Due to limitations in a third-party library used within SIGNificant Client, it is not possible to fill out all PDF forms. E.g. XFA forms (explicit check is integrated and the user informed) and Adobe LifeCycle Documents are not supported. That means support of a special form has to be checked for each document.

Password Protection

The Password Protection feature allows you to protect documents with a password. A click on the button will open a dialog asking for the password (which you will have to confirm).



The Client will indicate the protected status with a small yellow lock symbol in the upper right corner of the document frame.



Add an attachment to the document

PDF documents offer the functionality to add attachments of any file type.

Attachments that are PDF documents can also be attached as additional pages. Choosing another PDF document to attach enlarges your open document by the size of the attached one. You can also attach other information via a scanner; the scanned information is converted to PDF format.

To attach an existing file

1. Click .

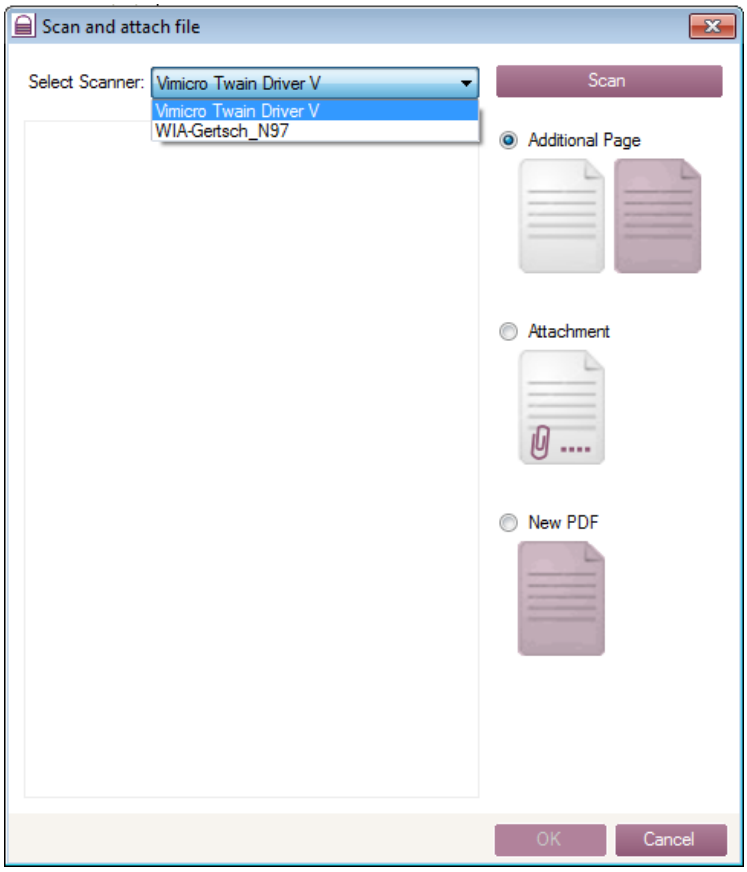
   A browse dialog opens.
2. Choose the file you want to attach to the document and click **Open**.
3. In the **Attachment** dialog choose whether you want to add the file as additional page (PDF documents only) or as an attached file.
4. Click **OK**

   The chosen file is attached to the document. When it has been attached as additional page, you can view it in SIGNificant Client. Otherwise, you can see the attachment in the Document Status Report or by opening the PDF document in Adobe Reader.

To attach a file via the scanner

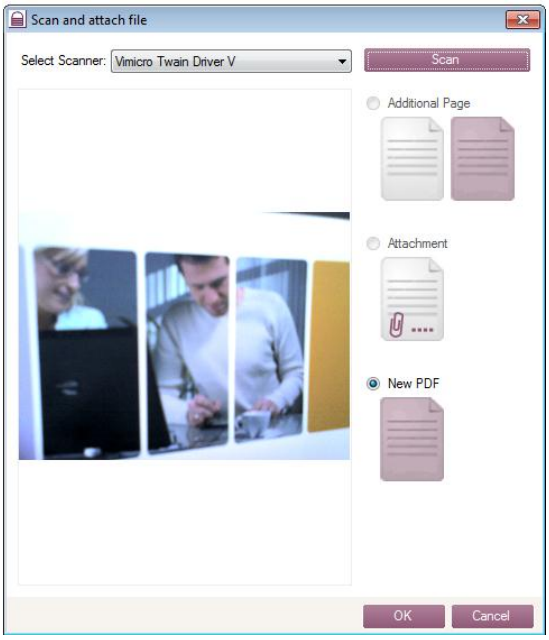
1. Click .

   The **Scan and Attach File** dialog appears.
2. In the dialog, choose the source to scan/snapshot from.



3. Click Scan in the dialog.

4. After your scanner's dialog, the scanned information appears as a preview in the dialog.



5. Choose whether you want the scanned document to be added to your document as additional (PDF) pages or as an attachment.

6. Click OK. The scanned information is added in the format you have chosen.

Viewing attachments

After attaching information as an attachment or opening a file with attachments, SIGNificant Client shows all attached documents in a separate pane.

These documents can be viewed by double clicking them or via a right click opened or saved out of the document.

Chapter 8

Signing & Sealing Documents

This chapter explains how to sign and seal documents.

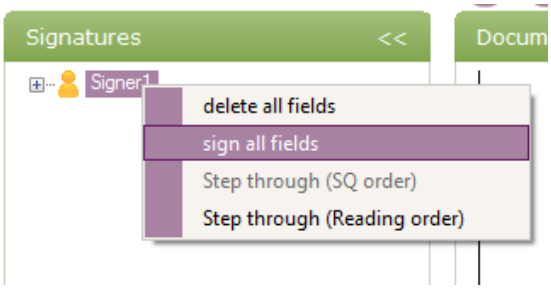
Signing Designed Documents

This procedure explains how to sign a document to which the designer has added you as a signer.

To sign a document

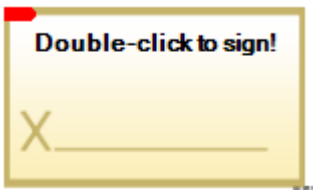
1. Do one of the following:

   - To sign ***all*** signature fields that require your signature ***at once***, right click on your name in the tree, then click **Sign** in the pop-up menu that appears.



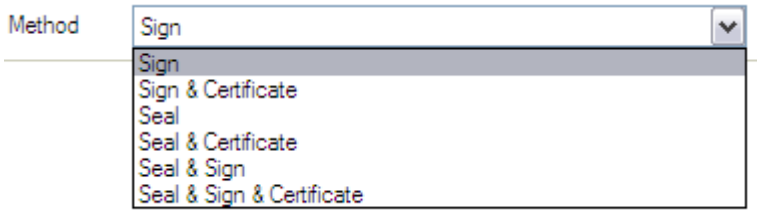
   - To sign a specific signature field, do one of the following:

     - Right click on the desired signature field in the tree and then click **Sign** in the pop-up menu that appears.
     - Double click on the desired signature field in the document.



The **Signature** dialog box opens, displaying your name in the **Signer** field.

2. Sign on your signature pad or tablet-pc. (The signing pad must be connected to your computer.)
3. If the **Method** dropdown list is enabled – this is not the case in the default setup! -, choose the signing method you would like to use by doing one of the following:



   - To sign the document using a signature tablet, select **Sign**. A signing area appears at the bottom of the dialog box. For the digital signature, the default certificate is used.

     To sign the document using a signature tablet and using a personal certificate, e.g., on a token, instead of the default certificate, select **Sign & Certificate.**

     To sign the document using a visible stamp imprint, select **Seal.** All stamps available are listed at the bottom of the dialog box. For the digital signature, the default certificate is used.

   - To sign the document using a stamp together with your personal certificate, select **Seal & Certificate**.

   - To sign the document using a signature tablet and a stamp, select **Sign & Seal**. For the digital signature, the default certificate is used.

   - To sign the document using a signature tablet and a stamp together with your personal certificate, select **Sign & Seal & Certificate.**

   If the **Method** dropdown list is not enabled, the document designer already chose a signing method for you. The **Method** field displays the selected method.

4. The following things happen in the order below:

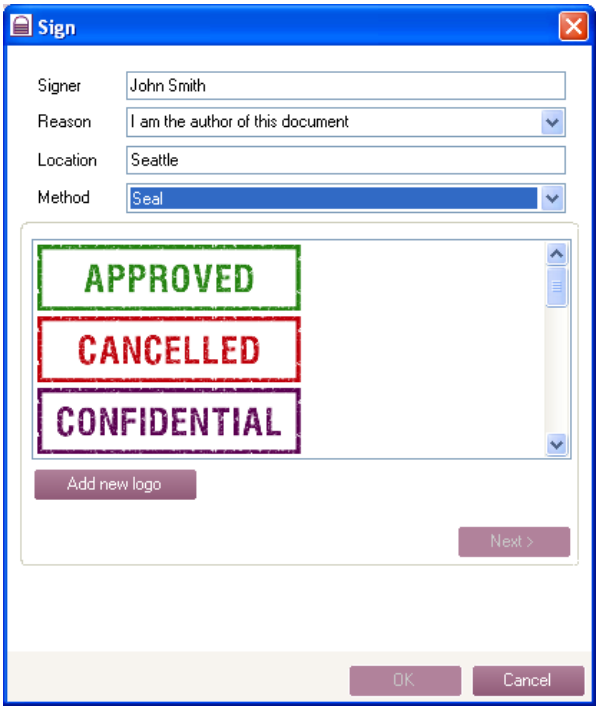
   - If the selected signing method contains **Sign**, the signing area is enabled. Sign the document using a signature tablet as follows:

     1. Write your signature on the signature pad or tablet-pc. (The signing pad must be connected to your computer.)

2. Click **Next**.
3. If the designer specified that your signature should be authenticated biometrically, SIGNificant Client connects to the SIGNificant Biometric Server and authenticates your signature. The SIGNificant Biometric Server's response appears below the signing area.

- If the selected signing method contains **Seal**, a list with provided seal logos is provided. Do one of the following:

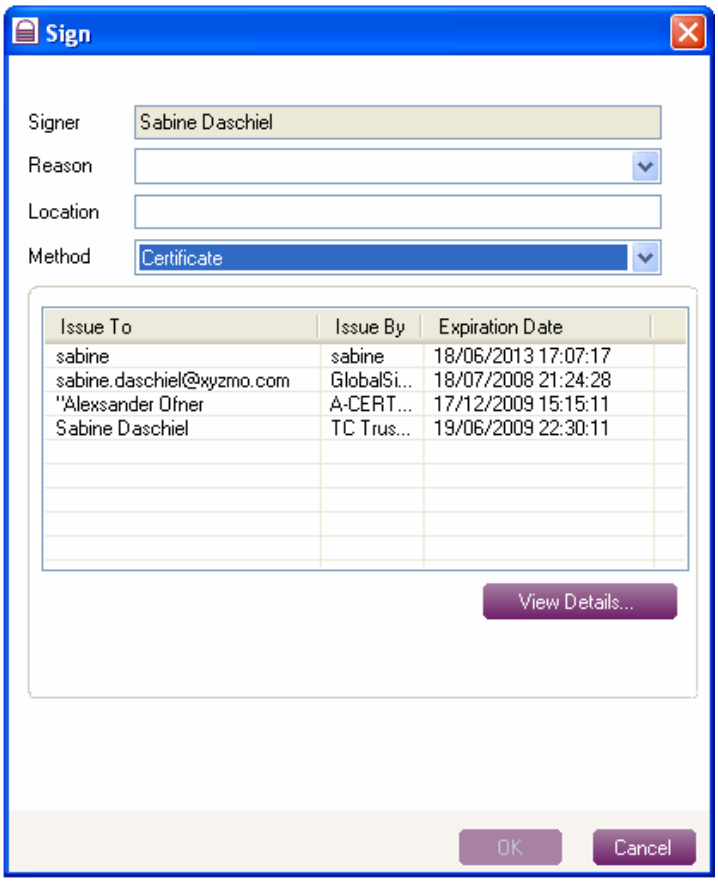
1. Choose a logo from the list



2. Add a new logo by clicking the `Add new logo` button and choose any graphic located on your PC. (If the button is disabled, it means that this feature is restricted by your administrator.)
3. After choosing a seal logo, click on **Next.**

Note: Since you can use any graphic located on your PC, you can use your wet signature on paper, scan it, and add this scanned signature as an additional stamp logo.

- If the selected signing method contains **Certificate**, SIGNificant Client searches for valid digital certificates on your local machine. A list of certificates appears:



If no certificates appear, you must install a certificate first. For information, see *Installing Certificates* on page 15

Do the following:

1. Select the certificate you want to use for signing the document.

   The digital certificate can be stored on the local machine or on a connected device, such as a smartcard or token. If the certificate is stored on a connected device that is configured to require a PIN, you must enter the PIN each time you sign a field using this certificate.

2. (Optional) To view the selected certificate, click **View Details**.

3. Click **OK**.

   The document is signed with the digital certificate.

5. Your signature appears in the relevant signature field(s) in the document, along with the time and date at which you signed. The icon appears next to your name and signature(s) in the tree.

xyzmo
Version 4.0.0.7
Document
contract.
Client/Property Owner
Signature
Printed Name
Date
Client agrees to pay 50% down and additional 50% upon completion of Staging.

Signing Documents On the Fly

This procedure explains how to sign a document in which the document designer did not add you as a signer or for which there was no previous document design process.

To sign and/or seal document on the fly

1. Click or , depending on whether you want to sign or seal your document. (The signing method can be changed afterwards unless the signing method is chosen by your administrator.)
2. A signature field appears in the document.

3. Drag the signature field to the desired location in the document.
4. Double-Click the signature field and sign

5. If the selection was the following dialog appears when you double-click the signature field

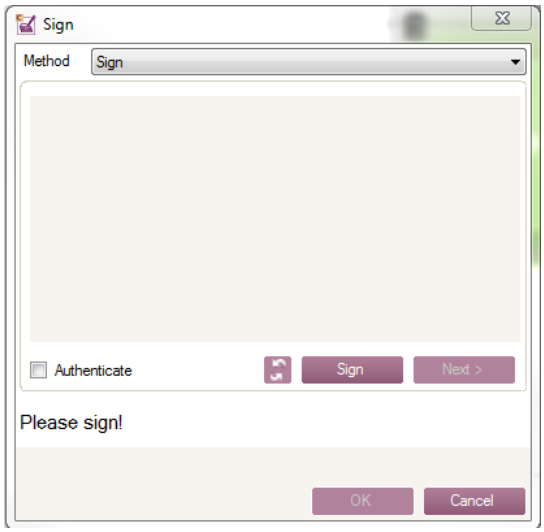
6. In the **Method** dropdown list, choose which signing method to use by doing one of the following:

   - To sign the document using a signature tablet but no seal imprint, select **Sign**. A signing area appears at the bottom of the dialog box. For the digital signature, the default certificate is used.
   - To sign the document using a signature tablet and a personal certificate, e.g., on a token, instead of the default certificate, select **Sign & Certificate.**

     To sign the document using a stamp, select **Seal.** All stamps available are listed at the bottom of the dialog box. For the digital signature, the default certificate is used.
   - To sign the document using a stamp together with your personal certificate, select **Seal & Certificate**.
   - To sign the document using a signature tablet and a stamp, select **Sign & Seal**. For the digital signature, the default certificate is used.
   - To sign the document using a signature tablet and a stamp together with your personal certificate, select **Sign & Seal & Certificate.**

7. The following things happen in the order below:

   - If the selected signing method contains **Sign**, the signing area is enabled. Sign the document using a signature tablet as follows:

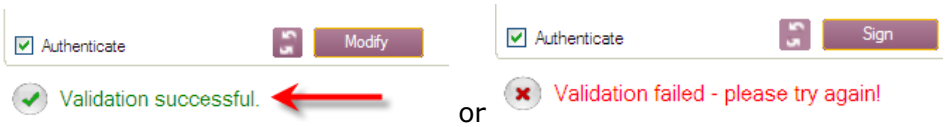


1. (Optional) To specify that your signature should be authenticated biometrically, select the **Authenticate** check box.

   This option is only available when a connection to the configured SIGNificant Biometric Server can be established. For further information on how to configure a Biometric Server ask your Administrator or read the *SIGNificant Client Administrator Guide.*

2. Write your signature on the signing pad.

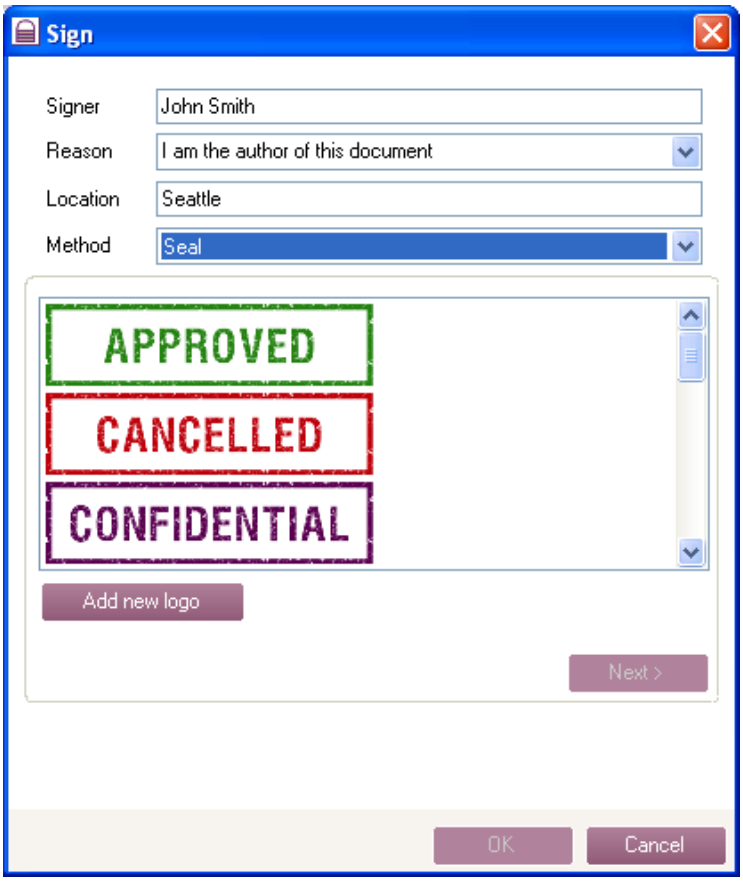
   If you selected Authenticate, SIGNificant Client connects to the SIGNificant Biometric Server and authenticates your signature. The SIGNificant Biometric Server's response appears below the signing area.



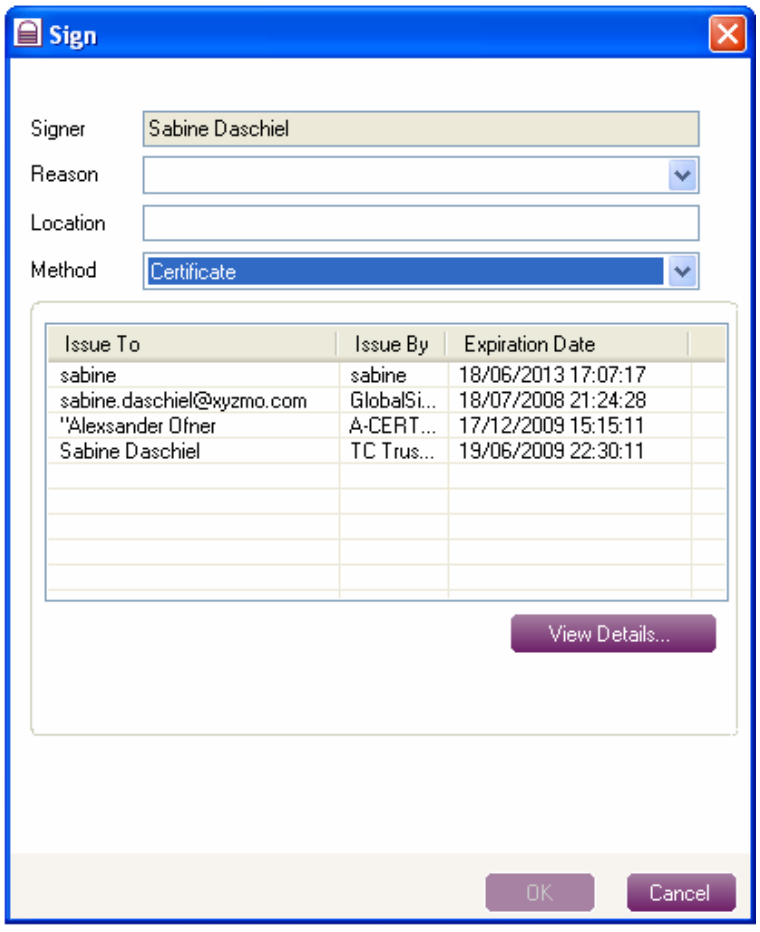
3. Click **Next**.

- If the selected signing method contains **Seal**, a list with provided seal logos is provided. Do one of the following:

  1. Choose a logo from the list.
  2. Add a new logo by clicking the `Add new logo` button and choose any graphic located on your PC. (If the button is disabled, it means that this feature is restricted by your administrator).
  3. After choosing a seal logo click on **Next.**



- If the selected signing method contains **Certificate**, SIGNificant Client searches for a digital certificate on your local machine. A list of certificates appears.



If no certificates appear, you must install a certificate. For information, see *Installing Certificates* on page 15.

Do the following:

1. Select the certificate you want to use for signing the document.

   The digital certificate can be stored on the local machine or on a connected device, such as a smartcard or token. If the certificate is stored on a connected device that is configured to require a PIN, you must enter the PIN each time you sign a field using this certificate.

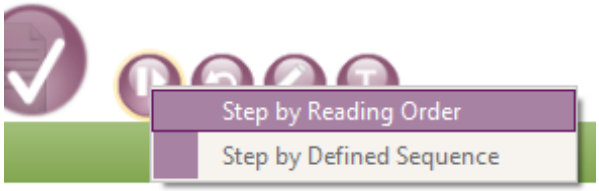
2. (Optional) To view the selected certificate, click **View Details**.

8. Click **OK**.

   Your signature appears in the document, along with the time and date at which you signed. The icon appears next to your name and signature in the tree.

Signing documents by stepping through signature fields

SIGNificant Client allows the user to sign all signature fields created with a sigstring within a sq tag in exactly this sequence or in reading order.



Defined Sequence:

That means users can design documents (see chapter Designing Documents in Other Programs) with sigstrings e.g. `sig,uid=tester1,sq=1` and `sig,uid=tester2,sq=2` to enforce a signing order.

Reading Order:

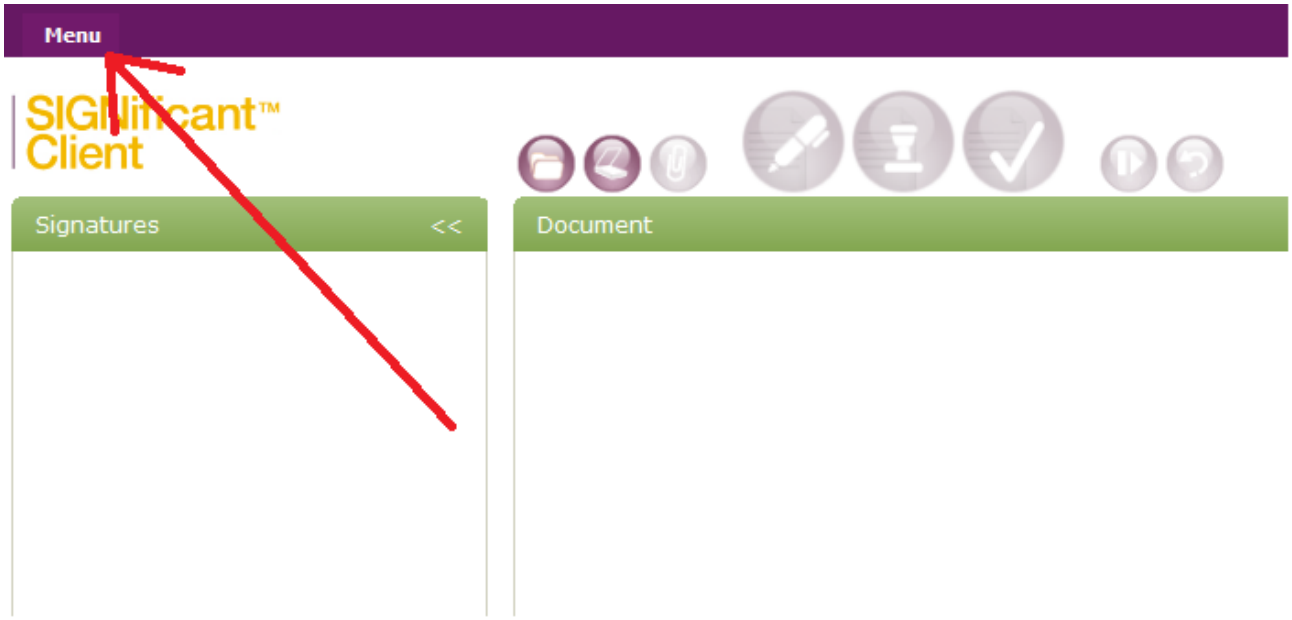
That means user can design documents with sigstrings e.g. `sig`, Signifcant Client parse the reading order (default: right to left).

Print such a document to the SIGNificant Client and click the button. SIGNificant Client will open the configured signing dialog and starting with signing for user "tester1." After capturing the signature and clicking "OK," the Client will automatically start the next signing dialog for "tester2."

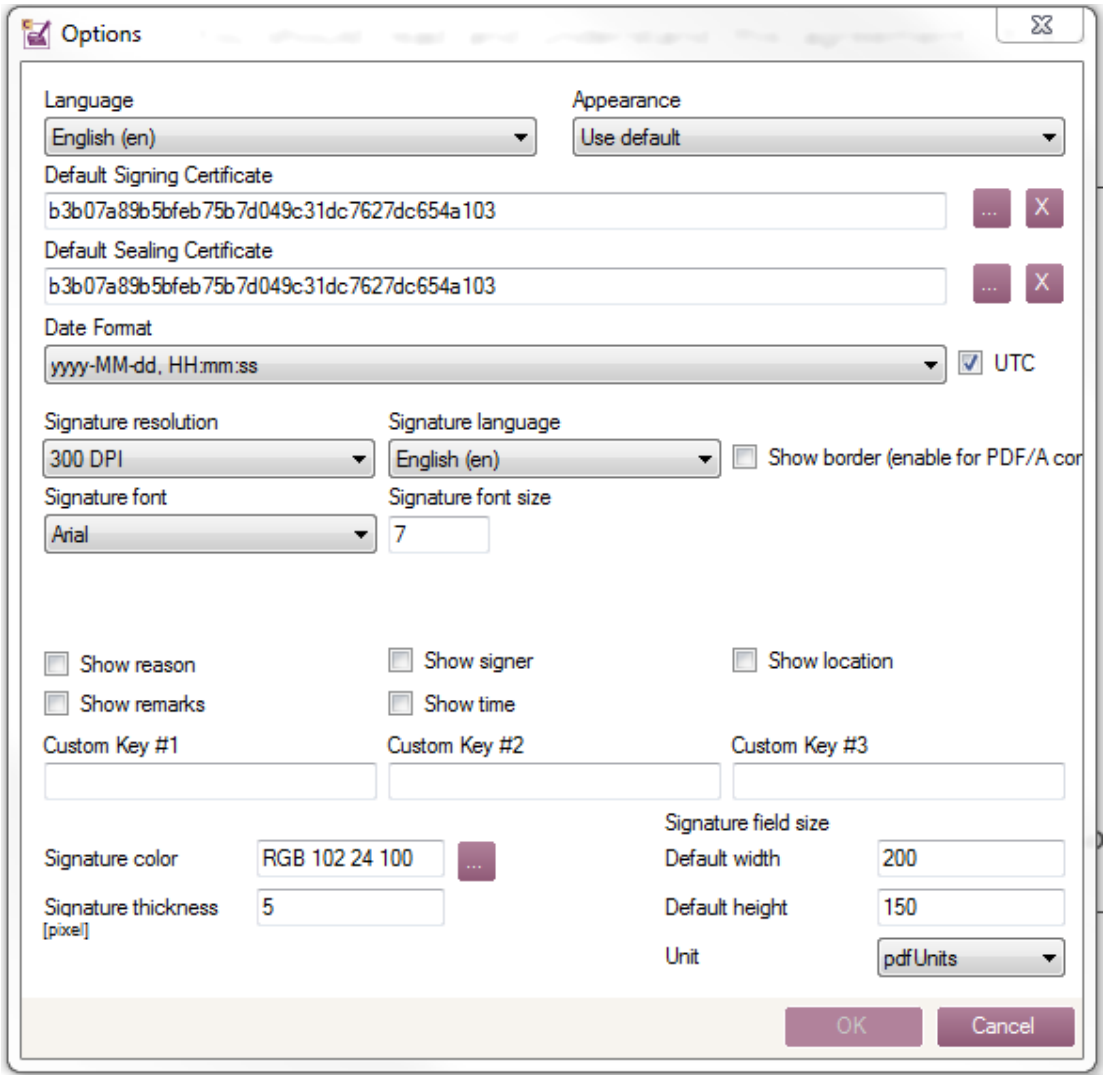
Along with the Inline Signing feature, this creates a fast and comfortable way to sign a document in a given order.

Options Menu

You can adjust all important options regarding the layout of signatures and other functionalities, such as language.



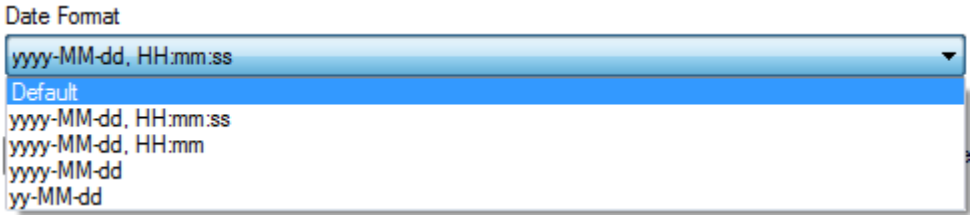
On the top pane, click on **MENU** and in the dropdown menu choose **Options**. The **Options** dialog appears:


Options
Language
English (en)
Appearance
Use default
Default Signing Certificate
b3b07a89b5bfeb75b7d049c31dc7627dc654a103
Default Sealing Certificate
b3b07a89b5bfeb75b7d049c31dc7627dc654a103
Date Format
yyyy-MM-dd, HH:mm:ss
UTC
Signature resolution
300 DPI
Signature language
English (en)
Show border (enable for PDF/A cor
Signature font
Arial
Signature font size
7
Show reason
Show signer
Show location
Show remarks
Show time
Custom Key #1
Custom Key #2
Custom Key #3
Signature field size
Signature color
RGB 102 24 100
Default width
200
Signature thickness
[pixel]
5
Default height
150
Unit
pdfUnits
OK
Cancel

To adjust the appearance of the SIGNificant Client software

1. Choose the language from the dropdown box. The default language is set to match the regional settings of your operating system.
2. Furthermore you can customize the color of the signature, the thickness and the size of the signature field

3. Choose the date format you like from the dropdown box. The time in your signature will appear in this format.

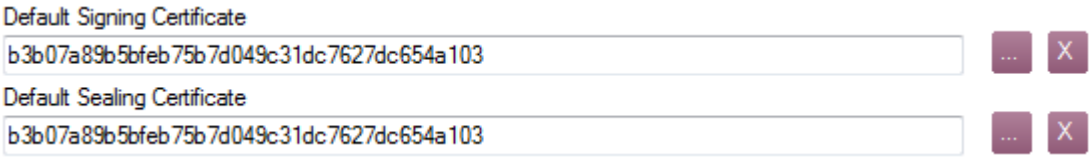


Note: If you want the time to be shown in UTC (Coordinated Universal Time), mark the "UTC" checkbox next to the "Date Format" Box.

4. Choose whether signer, time, reason, and location should be shown in the signature. See here some examples:

To adjust certificate settings

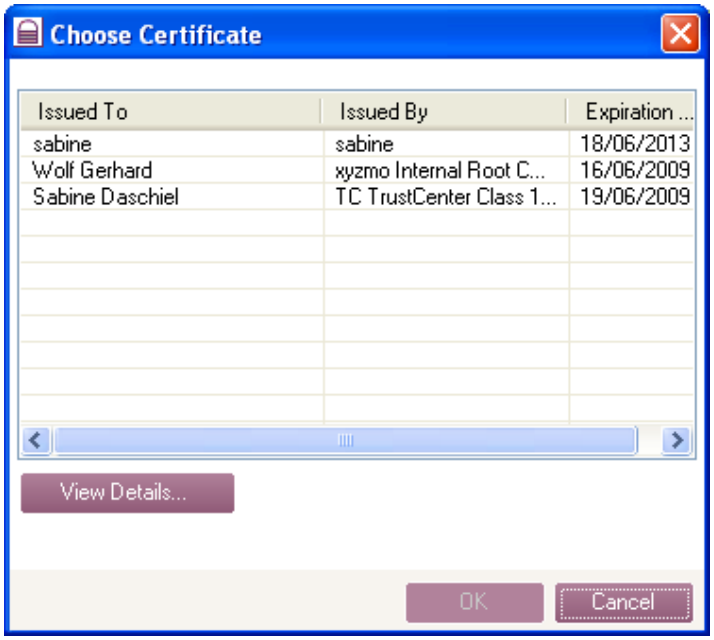
1. To choose a **default signing/sealing certificate**:



   a. Click ...

      The **Choose Certificate** dialog appears.

b. Choose a certificate:



c. This certificate is used when the signature method is either Sign, Seal, or Sign & Seal (without the option to choose a personal certificate).

In order to deselect the chosen certificate click on .

Using the Undo Button

SIGNificant Client has an undo button for all functionalities. By pressing you can undo the following actions:

- Adding a signature field
- Deleting a signature field
- Adding a signature
- Adding a text annotation
- Adding a handwritten annotation
- Rotating the document
- Adding attachments to your document
- Adding additional pages to your document

Continuing With the Signed Document

Saving Copies of a Document

You can save open documents at any stage, whether they are currently being designed or are partially signed.

Note: When saving a copy of the current document, all signature fields added after the last signature are omitted. This is due to the fact that these empty signature fields are a change made to the document and will invalidate the previous signature. Use the "save design" button described later to save the document including new (and empty) signature fields.

To save a document

1. Click .
2. The **Save As** dialog box opens.
3. Browse to the desired directory.
4. Type the desired file name.
5. Click **Save**.
6. The document is saved.

Sending an e-mail with the signed document

You can send your document by e-mail every time during the signing process or when all signatures are complete.

To e-mail the document

1. Click .
2. A new message opens in your standard e-mail client with the signed document attached.
3. Continue sending the e-mail as usual.
4. If the recipient is also using the SIGNificant Client, he can continue signing and sealing the document.

Printing the signed document

You can print a document at any time during the signing process or when all signatures are complete.

To print a document

1. Click .

   The **Print** dialog box opens.
2. In the **Name** dropdown list, select the desired printer.
3. Click **OK**.

   The document is sent to the printer.

Closing SIGNificant Client

To close SIGNificant Client

- Close the window. All your signatures are automatically saved. Unsigned signature fields are lost.

Open signed documents in the Adobe Reader

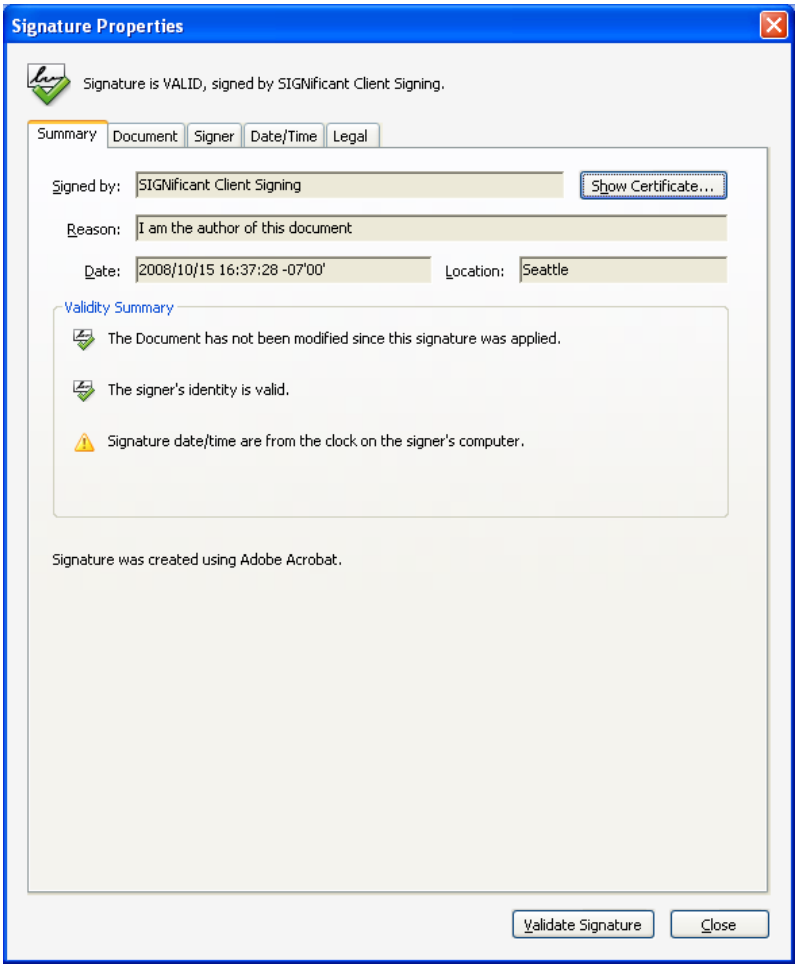
All PDF documents created and/or signed with SIGNificant Client can be opened and viewed with the free Adobe Reader.

If you haven't chosen your personal certificate or configured a default certificate, all signatures applied will use the default SIGNificant Client Signing certificate. Since this certificate is issued by xyzmo for trial purposes, Adobe Reader doesn't trust this certificate by default. We strongly recommend replacing that certificate with your personal or company certificate. The purpose of the default certificate is to make things as easy as possible for you during the trial period. Once you decide to work with this product, especially in commercial environments, you should not use the default certificate.

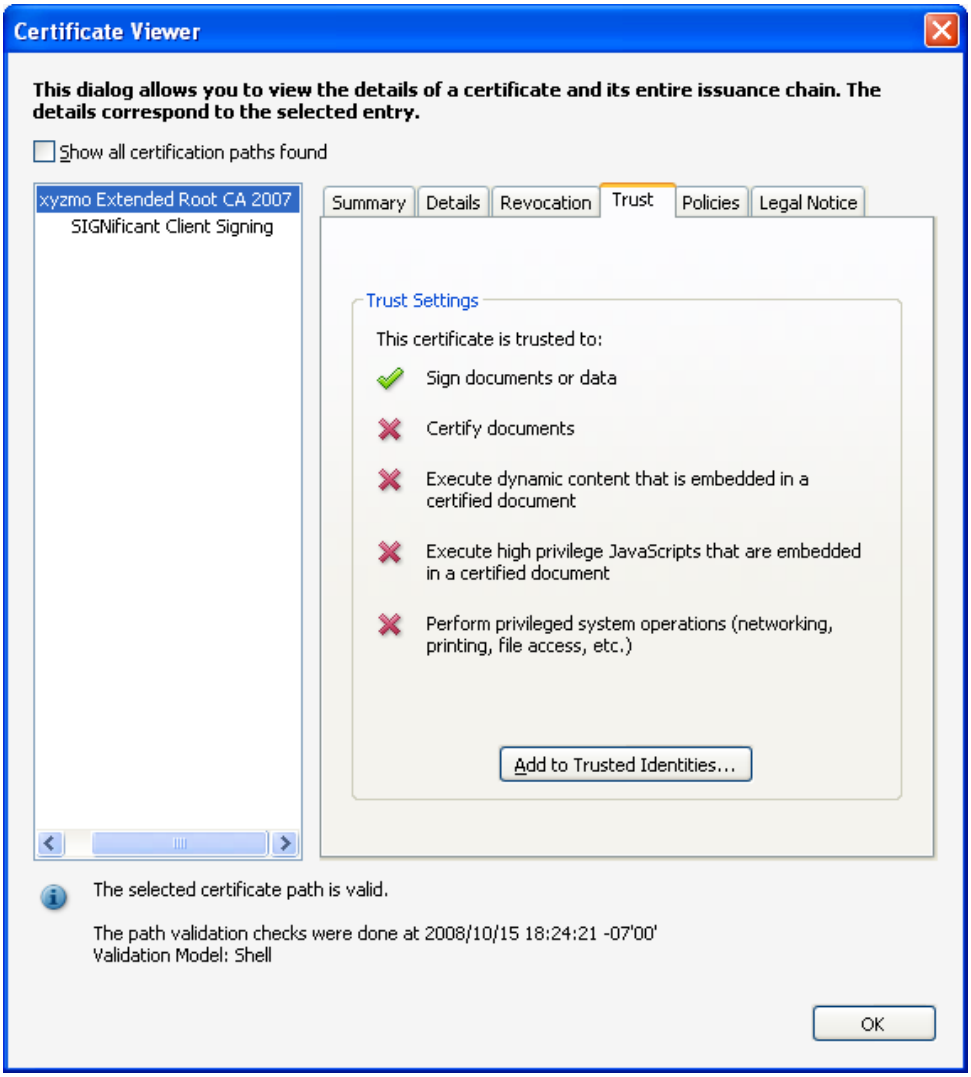
If you want to continue working with this default certificate, you must perform the following steps in order to get a green checkmark next to your signature in the Adobe Reader.

Add the SIGNificant Signing Certificate to your trusted certificates:

1. Open the signed document in any Adobe Reader
2. You will get a question mark (?) next to your signature. If you double click it, Adobe indicates that the certificate used is not known.
3. Double click the signature.
4. Choose **Signature Properties**
5. Click on **Show certificate**



7. Click on the **Trust** tab and choose **Add to trusted Identities**



8. The green checkmark will appear next to your signature.