

CoSign Quick Guide **Signing PDF Files** with **OmniSign**

Table of Contents

Launching OmniSign	1
Creating and Signing a Digital Signature Field	2
Inserting a Digital Signature Field without Signing	2
Signing an Unsigned Digital Signature Field	3
Inserting and Signing Electronic Signature Fields	3
Performing a Multi-Page Signature Operation	3
Validating All Signatures	4
Performing Operations on a Signature Field	4
Configuring Settings for a Single Signature	5
Configuring Default Signature Settings	6
Appendix A: Converting files to PDF using OmniSign	6

This chapter describes how to use the CoSign® OmniSign application to manage digital signature related operations in PDF documents.

Launching OmniSign

To launch OmniSign for PDF documents:

- » Right-click on the file name and select **Sign with CoSign**. OmniSign is launched.

The OmniSign window (*Figure 1*) includes several elements:

- » **Navigation bar** - Navigate and control the zoom level of the document being viewed.
- » **Main window** - Displays the currently open PDF document/s in Static or Cascading mode.
- » **Signatures Panel** - Enables you to view all signed and unsigned signature fields, and perform various operations on the signature fields.

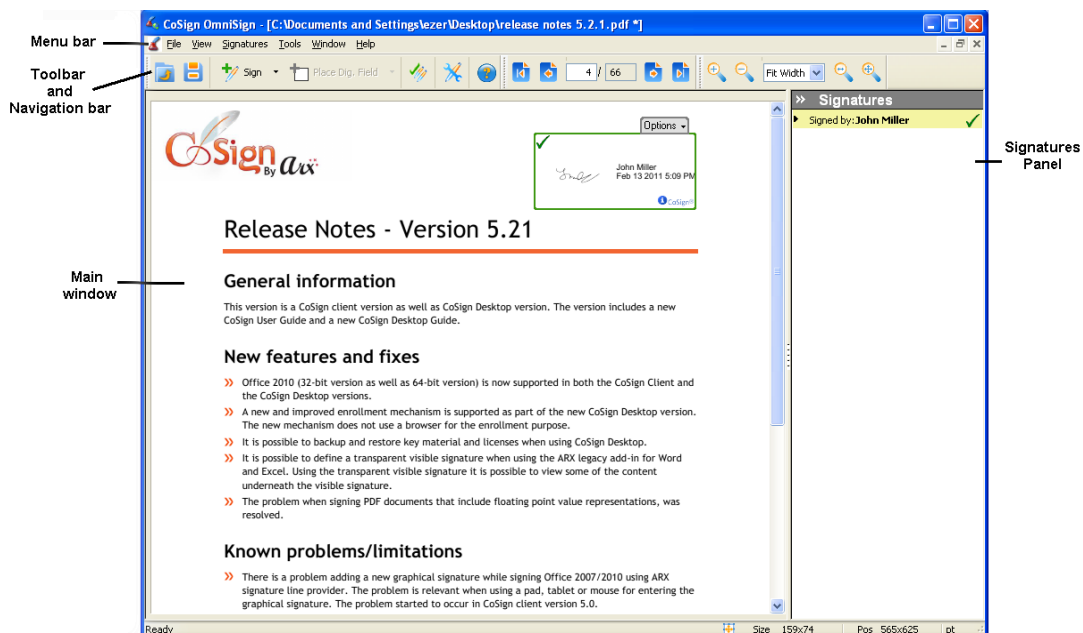


Figure 1: OmniSign Window

- » **Toolbar** - Enables you to perform various signature related operations, such as creating and signing a new signature field in the PDF document. (Figure 2)




Figure 2: OmniSign Toolbar

Creating and Signing a Digital Signature Field

You can create and sign a digital signature field in a single operation.

To create and sign a digital signature field:

- » Click  in the Toolbar (Figure 2), or select **Signatures** → **Sign** from the Menu bar.
- » In the main window (Figure 1), place the mouse on the desired location of the new signature field. Click and drag to create a new signature field, and size it as desired. Release to create the signature field.
- » The standard Signing Ceremony dialog box appears, displaying your default signature. (Figure 3)
- » Click **Sign**. A new, signed signature field is created. (Figure 4)

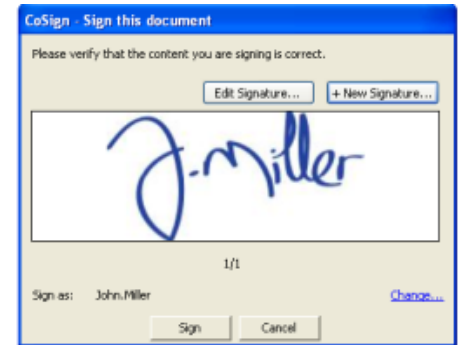


Figure 3: Signing Ceremony Dialog Box with Default Signature

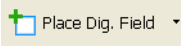


Figure 4: Signed Signature Field

Inserting a Digital Signature Field without Signing

It is possible to insert a digital signature field without signing it. This is useful when designing a document template.

To create a digital signature field:

- » Click  in the Toolbar, or select **Signatures** → **Place Digital Field** from the Menu bar.
- » In the main window, place the mouse on the desired location of the new signature field. Click and drag to create a new signature field, and size it as desired. Release to create the signature field. A new signature field is created. (Figure 5)
- » To change the shape or size of the signature field, click and drag any of the handles on the corners of the field. You can also drag the entire signature field to a different location by clicking inside the rectangle and dragging it.
- » To change the default signature settings for this signature field, right-click inside the signature field and select **Settings**. Or, select **Settings** from the **Options** drop-down menu located just above the signature field. (Figure 6)

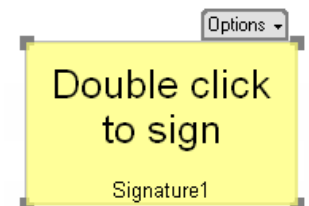


Figure 5: New Signature Field

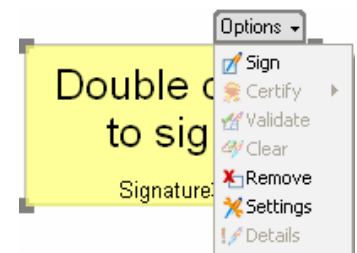


Figure 6: New Signature Options

Signing an Unsigned Digital Signature Field

To sign an unsigned digital signature field:

- » Double-click the signature field or select **Sign** from the **Options** drop-down menu. (Figure 6)
- » The standard Signing Ceremony dialog box appears, displaying your default signature.
- » Click **Sign**. A digital signature operation is performed and your signature appears.

Inserting and Signing Electronic Signature Fields

You can incorporate electronic signatures into a PDF document. An electronic signature is a graphical image of a handwritten signature. Electronic signatures are suitable for certain applications such as Point of Sale purchases. In a Point of Sale scenario, the customer may electronically sign a sales contract. Then, the local sales person can digitally sign and effectively seal the document. For more information on inserting and signing electronic signature fields, please refer to the [CoSign v5.4 User Guide \(Chapter 8: Inserting an Electronic Signature Field\)](#).

Performing a Multi-Page Signature Operation

You can add a digital signature field to multiple pages of a PDF document in a single operation. This operation adds a new unsigned signature field to subsequent pages of a document based on the location of the first signature field you create in the document. Multi-page signing is suitable for contract-type documents, CAD drawings, or any type of document that may require signatures or seals on multiple pages.

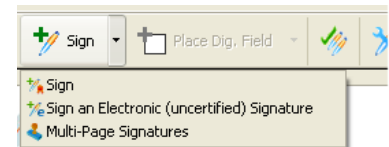


Figure 7: OmniSign - Signing Options

To create a multi-page signature field:


- » Go to the first page that requires a signature.
- » Open the drop-down menu using the arrow on the **Sign** button . (Figure 7)
- » Select **Multi-Page Signatures**.
- » Click the mouse to indicate the top left corner of the new signature field. An empty signature field is created, and the *Multi-Page Signatures* dialog box appears. (Figure 8)
- » Optionally drag or resize the empty signature field or click **Settings** to specify signature settings for this signature.
- » Click **Sign**. The standard Signing Ceremony dialog box appears. Select or enter the relevant information.
- » The signature field is signed.




Figure 8: Multi-Page Signatures Dialog Box



On each subsequent page, the new signature field is created at the same location, with the same appearance and settings.

- » Click **Sign** to sign the current page and display the next page.
 - If you do not want to sign a page, click **Skip**. The next page will be displayed.
 - At any page, you can click **Settings** to change the signature settings from the current page onward.
- » Click **Done** to end the Multi-Page Signatures operation.

Validating All Signatures

To validate all signatures, click  in the Toolbar, or select **Signatures** → **Validate all Signatures** from the Menu bar.

The Signatures Panel (*Figure 1*) displays the validity status of each signature. In the main window, a valid signature appears with a green check mark, an invalid signature appears with a red cross mark, and an unknown (not yet validated) signature appears with no indication.

- A green check  indicates a valid signature.
- A red "X"  indicates an invalid signature.

Performing Operations on a Signature Field

You can perform various operations on a signature field. To view these operations, you may:

- » Click the **Options** drop-down menu located above the signature field. (*Figure 6*)
- » Right-click on the signature field.
- » Left-click a signature field in the Signatures Panel. (*Figure 1*)

The available operations include:

- » **Sign** - Signs or re-signs the signature field.
- » **Certify** - Performs a PDF signature operation that is "stronger" than the regular PDF signature operation as described in the [CoSign v5.4 User Guide \(Chapter 7: Certifying an Adobe Acrobat Document\)](#). When a document is certified, you can specify one of the following certification modes:
 - **No further changes allowed** - No changes are permitted to the PDF document.
 - **Form filling & signing allowed** - You may enter data in forms, and sign existing signature fields in the PDF document.
 - **Annotations, form filling & signing allowed** - You may add annotations to the document, enter data in forms, and sign existing signature fields in the PDF document.

The **Certify** operation is disabled if there is a signed field in the document.

- » **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. This operation is disabled if there is a signed field in the document.
- » **Settings** - Displays the signature settings. Signature Settings can be changed if the field is not signed. The operation is disabled if there is a signed field in the document.
- » **Details** - Displays the digital signature status and certificate status.

Configuring Settings for a Single Signature

You may configure the settings and appearance of an individual signature. The *Signature Settings* dialog box contains the parameters that influence the signature appearance (Figure 9).

To access the Signature Settings dialog box:

- » Select **Settings** from the **Options** drop-down menu located above the signature field. (Figure 6)
- » In the Signature Settings dialog box, configure **General** parameters, **Appearance**, and the **Date & Time Format**.
 - » The **General** section allows you to specify a name for the signature field (**Field name**), specify whether the required signature is digital or electronic (**Signature type**), and select whether to prompt a signer to enter a reason during signing (**Prompt for signature reason**).
 - » The **Appearance** section allows you to select the elements that are displayed in the signature field.
 - **Show signature field** - Select whether to display the signature field. When this box is unchecked, the signature appearance and the signature size and position settings are disabled, and the signature field is hidden. This parameter is not relevant for electronic signatures.
 - **Display caption (labels)** - Indicates whether to use captions such as "Date," "Reason," and "Signed by" for the fields that will be displayed in the signature field.
 - Selecting **Graphical signature**, **Initials**, **Logo**, **Date and time**, **Signer's name**, **Title**, and/or **Reason** will display these elements in the signature field.
 - **Graphical signature location** - Specifies the location of the visible signature.

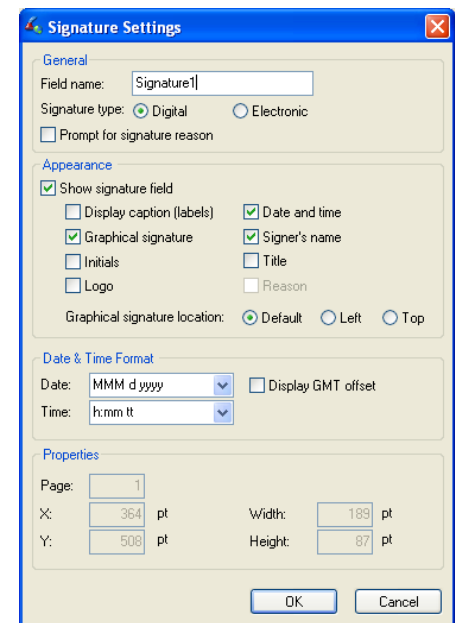


Figure 9: Signature Settings

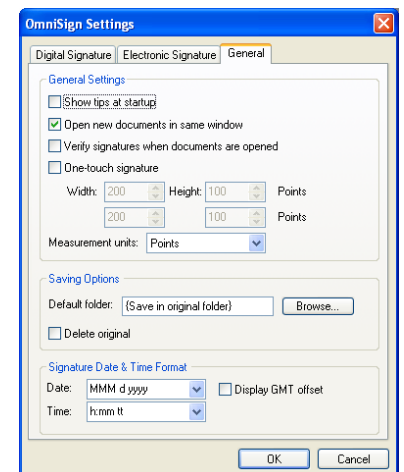



Figure 10: OmniSign Default Signature Settings - General

Configuring Default Signature Settings

You can configure the default appearance and other general settings of newly created digital and electronic signatures.

- » Click  in the Toolbar, or select **Tools** → **Settings** from the Menu bar. The *OmniSign Settings* dialog box appears. (Figure 10)
- » The **Digital Signature** and **Electronic Signature** tabs allow you to select specific elements to be displayed in the signature field.
- » Click the **General** tab to configure the default signature settings.
 - **General Settings** - Choose to display tip pop-ups at startup, open new documents in the active OmniSign window, validate all signatures upon opening a PDF file, or activate One-touch signature.
 - **Saving Options** - Specify where a signed PDF is stored and whether to delete the original file.
 - **Signature Date & Time Format** - Specify date and time format.

For a more detailed description of OmniSign functions, please refer to the [CoSign v5.4 User Guide \(Chapter 8: OmniSign – Signing PDF and Non-PDF Files\)](#).

Appendix A: Converting Files to PDF Using OmniSign

If your file is not in PDF format, you can easily convert it to PDF using OmniSign.

To convert to PDF using OmniSign:

- » Open the file.
- » Select **File** > **Print**. The *Print* dialog box appears. (Figure A displays the standard *Print* dialog box that appears in Microsoft Word).
- » Select **ARX CoSign**, and click **Print**.

Clicking **Print** triggers the PDF conversion process and simultaneously launches the OmniSign application, which displays the newly created PDF file.

Once the file is converted to PDF, you may create and digitally sign signature fields using OmniSign.



Figure A: Selecting the ARX CoSign Printer