



Software602, a.s.

Signer

User Manual

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Contents

1.	What is Software602 Signer	3
2.	Installation	3
2.1.	Silent installation	4
2.2.	Warning	5
3.	Running the application	6
3.1.	Login using 602 ID	6
3.2.	Login without registration.....	7
3.3.	Connection using the organization's server.....	7
3.4.	Creating a new registration for 602 ID.....	8
4.	Quick overview of basic features	10
4.1.	Access to basic features and their overview.....	10
4.2.	Selecting a file for further processing	11
4.3.	Attachment of an electronic signature and a time stamp to PDF documents	12
4.4.	Differences in attaching the signature and time stamps to documents ..	15
4.5.	Certificate validation	17
4.6.	Scanning documents to PDF	18
5.	Using the data mailbox	19
5.1.	Data mailbox login	19
5.2.	Checking delivered data messages.....	21
5.3.	Checking sent data messages	22
5.4.	Creating and sending a new data message.....	23
5.5.	Setting the number of displayed data messages	25
5.6.	Loading a saved data message	25
5.7.	Loading a message from Sofa.....	26
6.	Controlling the application	27
6.1.	Working with files	27
6.1.1.	Loading documents	27
6.1.2.	Saving documents	28
6.1.3.	Printing documents	28
6.1.4.	Closing documents.....	28
6.2.	PDF document compression	29
6.3.	PDF document or page rotation.....	31
6.4.	Metadata management.....	31

6.5.	Digital signature visualization	32
6.5.1.	Document signature with visualization	32
6.5.2.	Setting your own visualization image.....	34
6.6.	Signing office documents	35
6.7.	Bulk signing of documents	36
6.8.	Attaching a standalone time stamp	37
6.9.	Sealing	38
6.10.	Document validation and conversion to the archival format.....	38
6.10.1.	Verifying compliance with the PDF/A archival format	39
6.10.2.	Document conversion to various PDF formats	39
6.11.	Web page archiving.....	42
6.12.	Securing PDF documents against manipulation.....	43
6.13.	Document anonymization.....	45
6.13.1.	Deleting parts of the document.....	46
6.13.2.	Editing the selected area.....	47
6.13.3.	Saving and loading areas	47
6.14.	Ways of displaying the document's pages	48
6.15.	Adding and removing pages from the document	48
6.15.1.	Adding pages	48
6.15.2.	Removing pages	50
6.16.	Creating a textual field over a PDF document.....	50
6.17.	Export a document or its area as an image	51
6.17.1.	Export a whole page as an image.....	51
6.17.2.	Export of a part of a page	52
6.18.	Text extraction from an area in the document	53
6.19.	Inserting text in the document	54
7.	Signer settings overview	55
7.1.	Account Information	55
7.2.	License validity	56
7.3.	Login	56
7.4.	Proxy connection.....	58
7.5.	Requesting and renewing PostSignum certificates.....	58
7.5.1.	New certificate request	59
7.5.2.	Get new certificates	59
7.5.3.	Request for certificate renewal	60
7.5.4.	Get renewal certificates	61
7.6.	SignMaster CA certificate request	61
7.7.	Visualized signature.....	62

7.8. Other settings	64
8. Integration in Microsoft Office 365	66
8.1. Macro Functions	66
9. Remote signature certificate store	70
9.1. Running the necessary applications	70
9.2. Pairing devices	70
9.2.1. First pairing of the devices	71
9.2.2. Routine pairing of the devices.....	73
9.3. Establishing connection and allowing communication.....	74
9.4. Importing a certificate to the mobile device.....	76
9.4.1. Import from the certificate selection dialog	76
9.4.2. Import using a toolbar button.....	78
9.4.3. Finalizing the import.....	78
9.5. Using the certificate to sign documents	79
9.6. End of connection.....	81

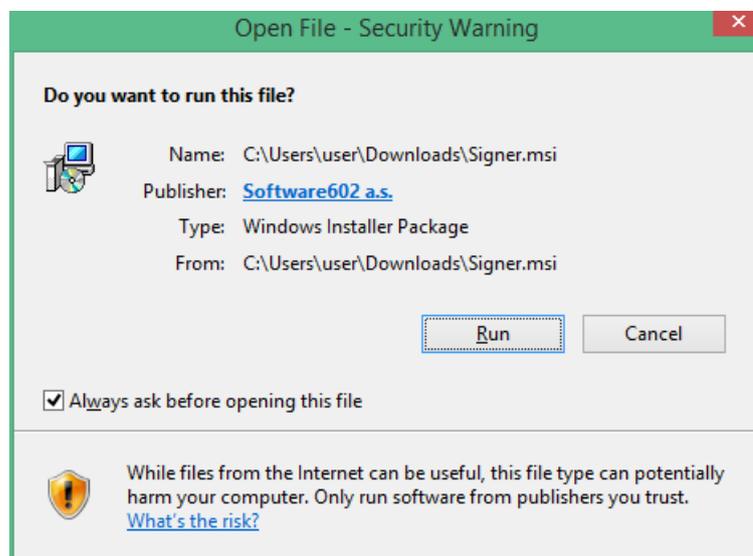
1. What is Software602 Signer

Software602 Signer is a tool for processing documents in electronic form in compliance with legislation, with the ability to digitally sign documents and also to validate the signatures on any device.

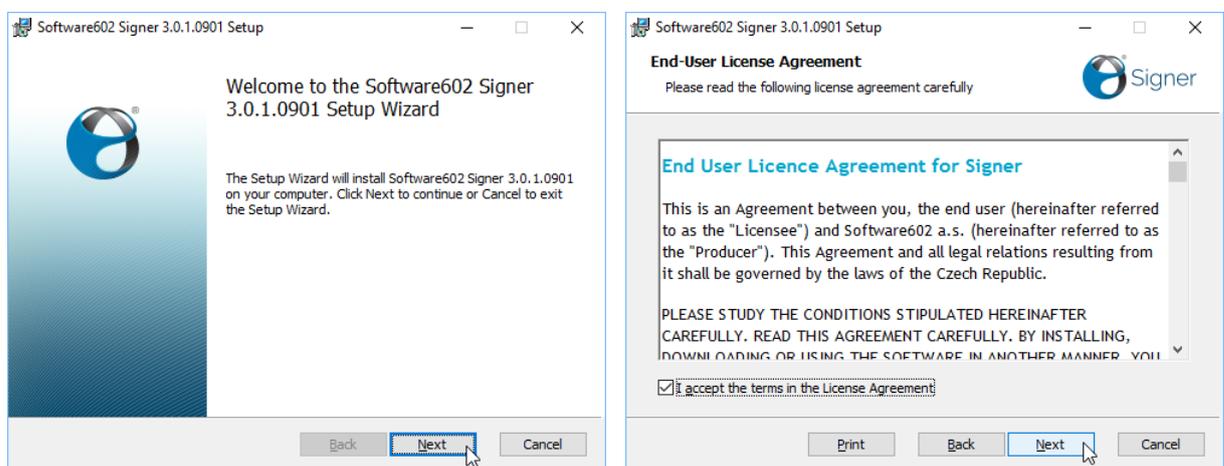
The application uses knowledge from the fields of digitization, authorization and the requirement on long-term archiving. Its purpose is not only to convert documents of various types into PDF, but also to provide timeless validity of authenticity to the resulting documents. Now it is also possible to store and load documents using SOFA, a cloud-based storage, and communicate with data mailboxes.

2. Installation

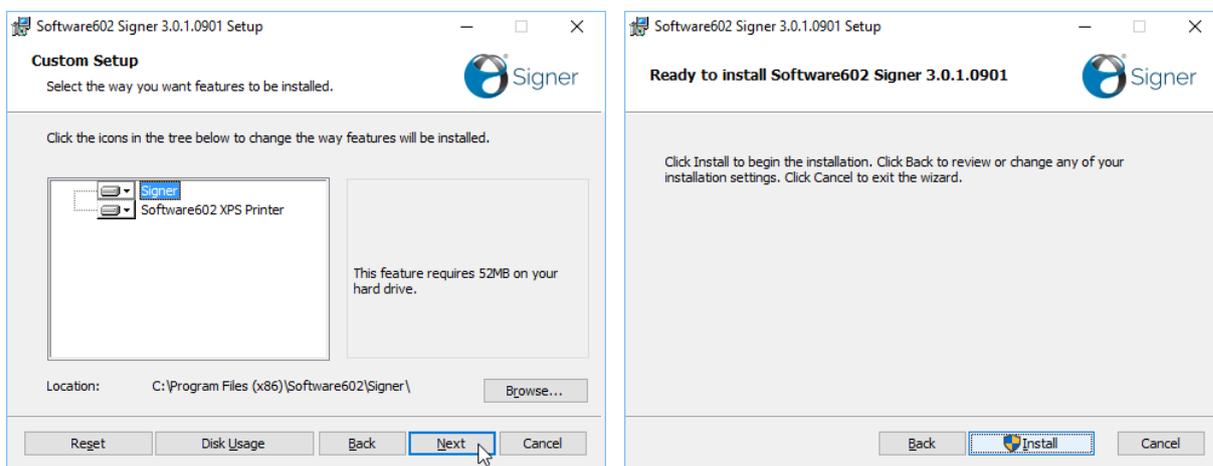
Start the installation by running the installation program according to the instructions you have received. When you run the program, a dialog as a safety measure against undesired software might be displayed – if everything is in order, click **Run**.



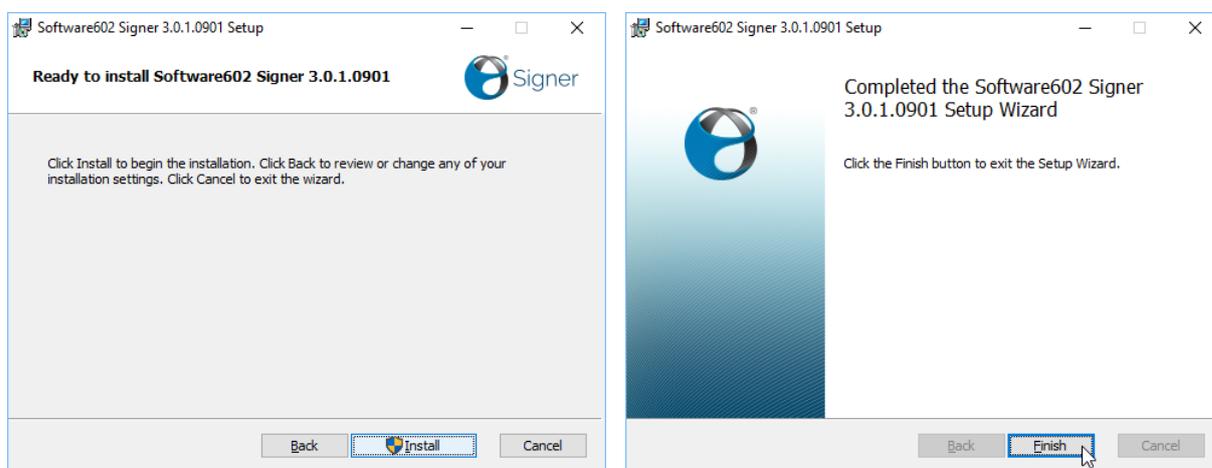
The usual installation wizard will follow – a set of dialogs asking to specify the installation details. Usually clicking **Next** is all you need to do. Only in the second dialog, you are required to check the box to confirm that you accept the License agreement. Unless you check the box, the **Next** button will stay inaccessible.



The third dialog allows you to select the installation type. The wizard installs the application in the default location including the Software602 XPS Printer, which is used to print to PDF from other applications. You can change the destination folder where the application files are installed and optionally remove the XPS printer. This is neither necessary nor very practical. In the fourth dialog, you will approach the installation itself – click **Install** to run the installation process.



The installation progress is visualized by an indicator in the fifth dialog. The last dialog announces that the process has finished. Click **Finish** to end the installation and you can start using the application immediately.



2.1. Silent installation

Administrators in organizations can install the *Software602 Signer* silently using standard [msiexec](#) parameters and optional parameters for connection to their own LTD SDK/Server, to check for updates, for proxy connection, setting up the default version when converting to PDF/A, to install MS Office plug-ins or install the Software602 XPS Printer. The individual parameters and their descriptions are listed below:

WEBSERVICE="https://server.address/ltd/ltd.asmx"

[optional]

WSUSER="WebServiceUserName"

WSPASS="WebServiceUserPassword"

[optional]

UPDATE="0" (Do not check for updates), **"1"** (Check for updates), **"2"** (User's choice – default value)

[optional]

PROXY="0" (User's choice – default value), **"1"** (Do not use), **"2"** (Use system settings) or **"3"** (User settings)

If PROXY="3" is used, the following parameters must be set too:

PROXYURL="http://proxy.server.address/"

PROXYUSER="ProxyUserName"

PROXYPASS="ProxyUserPassword"

[optional]

XPSPRINTER="0" (do not install Software602 XPS Printer), **"1"** (install Software602 XPS Printer – default value)

[optional]

INSTALLWORDMACRO="0" (do not install the extension for Microsoft Word), **"1"** (install the extension for Microsoft Word – default value)

INSTALLEXCELMACRO="0" (do not install the extension for Microsoft Excel), **"1"** (install the extension for Microsoft Excel – default value)

INSTALLPOWERPOINTMACRO="0" (do not install the extension for Microsoft PowerPoint), **"1"** (install the extension for Microsoft PowerPoint – default value)

[optional]

PDFEVER="1a" (default value for PDF/A conversion output format), **"1b"**, **"2a"**, **"2b"**, **"3a"**, **"3b"**, **"3u"** (additional possible values for PDF/A conversion output format)

[optional]

COMPANYFEATURES="0" (disable Data mailbox and Sofa service features), **"1"** (enable Data mailbox feature), **"2"** (enable the Sofa service), **"3"** (enable Data mailbox and Sofa service features - default value)

[optional]

STARTPAGE="0" (hide application's start page), **"1"** (display application's start page)

An example of silent installation:

```
msiexec /i "Signer.msi" /q AGREETOLICENSE=yes ALLUSERS=1
```

```
WEBSERVICE="https://server.address/ltd/ltd.asmx" PROXY="1" UPDATE="0"
```

```
PDFEVER="2b" COMPANYFEATURES="0"
```

2.2. Warning

This documentation might describe features which you cannot see or are unavailable to you. This is because users are assigned roles, based on which some features might be made available to them or not.

If you encounter issues of this kind or are unsure of your role, contact your administrator.

3. Running the application

The easiest way to start *Software602 Signer* is by clicking the application icon, which has been created on the Windows Desktop by the installation process.



Before entering the application you need to log in. There are three ways to do it.

- The first option is available if you, as a user, already have a **602 ID** – login details provided previously by Software602 (possibly in relation to other services). The details can be also obtained by registering on Software602's website or websites of other services provided by Software602. Version 3.5 has an additional option of saving login details.
- A second option is running the application without logging in – with limited features.
- The third and last option is connecting through a server run by your organization who has been given access to the application services.

You can decide whether to log in using 602 ID or continue without logging in in the start dialog, which is displayed when the application is run.

3.1. Login using 602 ID

The figure shows the dialog used mainly for logging in using a 602 ID. It is composed of your e-mail address and password. You can check **Remember me** to request that the application remembers these details and does not require them on your next login.

 The image is a screenshot of the Signer application's login dialog. At the top, there is the Signer logo (a blue and white globe) and the text 'Signer'. Below the logo is a horizontal line. The dialog contains the following elements:

- 'Account:' label followed by a dropdown menu showing '<other login>' and a downward arrow.
- 'User:' label followed by a text input field.
- 'Password:' label followed by a text input field.
- A checked checkbox labeled 'Remember me'.
- A blue button labeled 'Log in'.
- A grey button labeled 'Continue without login'.
- A blue link labeled 'Sign up for 602 ID'.

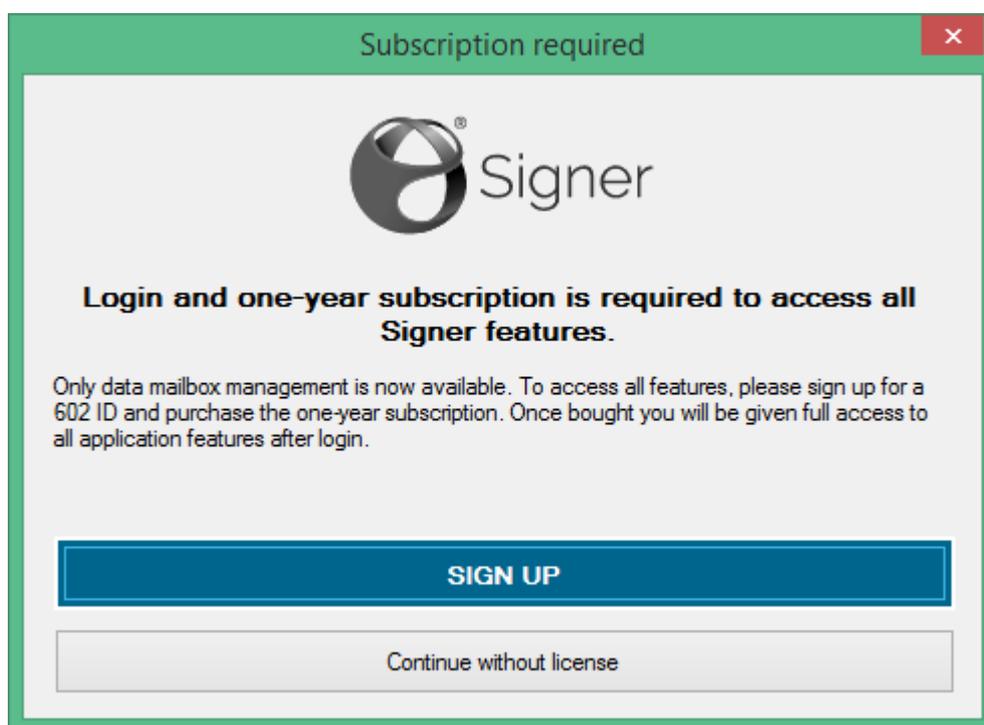
 At the bottom of the dialog, there is another horizontal line.

Since version 3.5, it is possible to name your account or individual accounts (if you have more than one) after login and select them by their name from a list that is displayed by tapping on the **Account** field. Learn more about creating account in the settings description on page 56.

3.2. Login without registration

Login without an account (without registration) will allow you to use *Software602 Signer* with limited features for signing and simple document processing. If you choose this option, click **Continue without login**.

If you run *Signer* this way and come across a feature that requires a full license, a window with corresponding information is displayed.



If you want full access, click **Sign up** to request registration and a 602 ID. Otherwise click **Continue without license**.

3.3. Connection using the organization's server

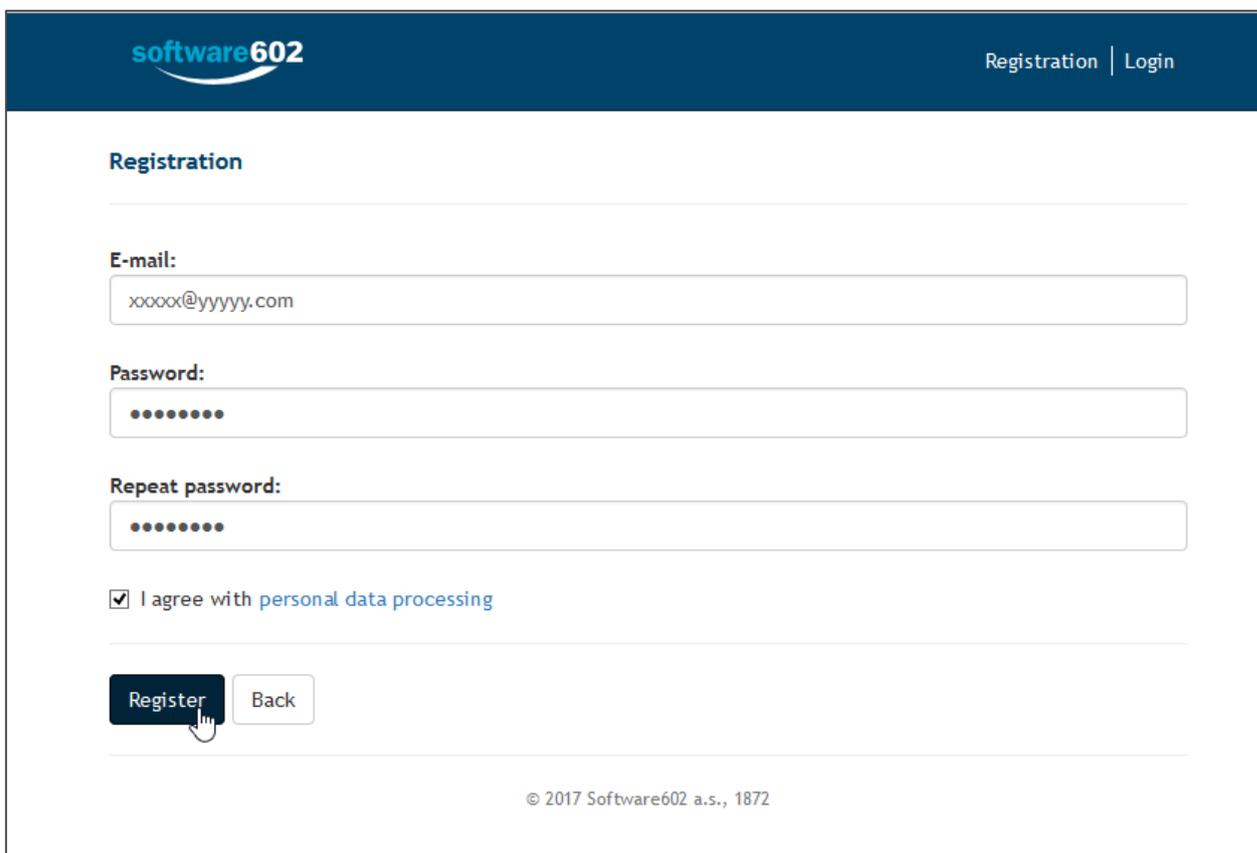
It is still possible to connect using your organization's server as in the previous versions (before version 3.5), but the new version of the application must be installed by the organization's administrator using silent installation parameters (see the description starting on page 4).

If your details for connecting to the organization (from a previous version of *Signer*) are still stored in the system's registry, you can continue using them in the new version, 3.5.

3.4. Creating a new registration for 602 ID

If you do not have a 602 ID for accessing the application yet, click on the link **Sign up for 602 ID** in the login window. You will be redirected to Software602's website, where you can create a login account.

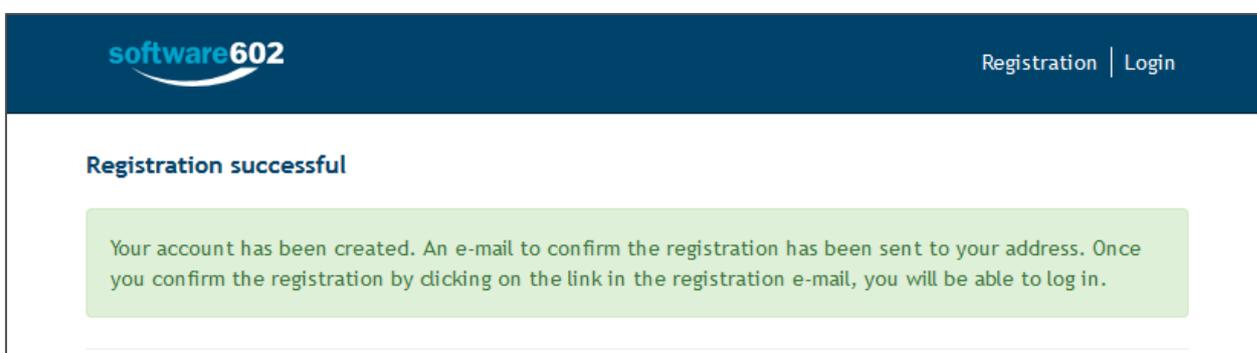
You will need to fill in your e-mail address, which will be used as a login name, your password, and then repeat your password again. Then check the box that marks your consent with processing your personal data and click **Register**.



The screenshot shows the registration page for Software602. The header includes the Software602 logo and navigation links for 'Registration' and 'Login'. The main content area is titled 'Registration' and contains the following fields and elements:

- An empty text input field for the first name.
- An 'E-mail:' label above a text input field containing 'xxxxx@yyyyy.com'.
- A 'Password:' label above a password input field with seven dots.
- A 'Repeat password:' label above another password input field with seven dots.
- A checked checkbox with the text 'I agree with [personal data processing](#)'.
- Two buttons: a dark blue 'Register' button and a white 'Back' button.
- A footer with the copyright notice '© 2017 Software602 a.s., 1872'.

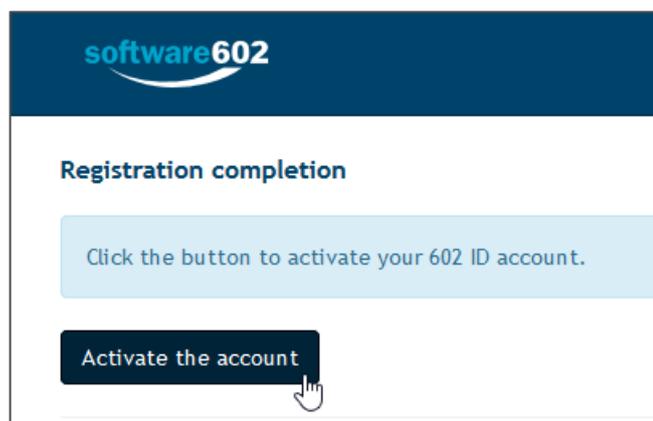
The registration is now complete. Follow the directions and wait until registration confirmation is delivered to the address you have supplied.



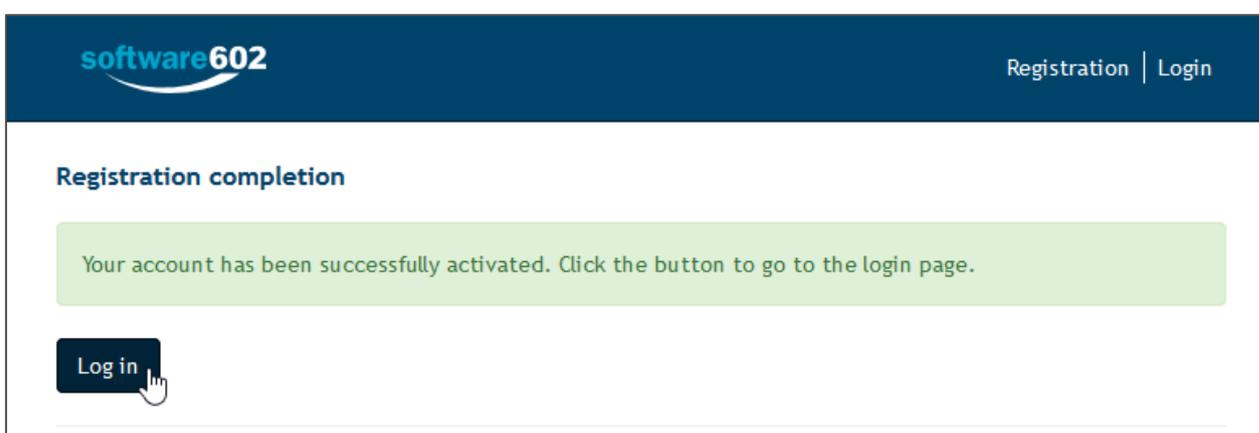
The screenshot shows the registration success page for Software602. The header includes the Software602 logo and navigation links for 'Registration' and 'Login'. The main content area is titled 'Registration successful' and contains a green message box with the following text:

Your account has been created. An e-mail to confirm the registration has been sent to your address. Once you confirm the registration by clicking on the link in the registration e-mail, you will be able to log in.

Open the confirmation e-mail and click the [Registration confirmation link](#), then in the web browser click **Activate the account**.



Continue by clicking the **Log in** button to open the sign-in dialog, where you can sign in for the first time.



After you sign in, go to the account administration page, where you can fill in or change your details and, if needed, also request certificates, buy more time stamps and adjust other settings. A detailed description of all the options is outside the scope of this document.

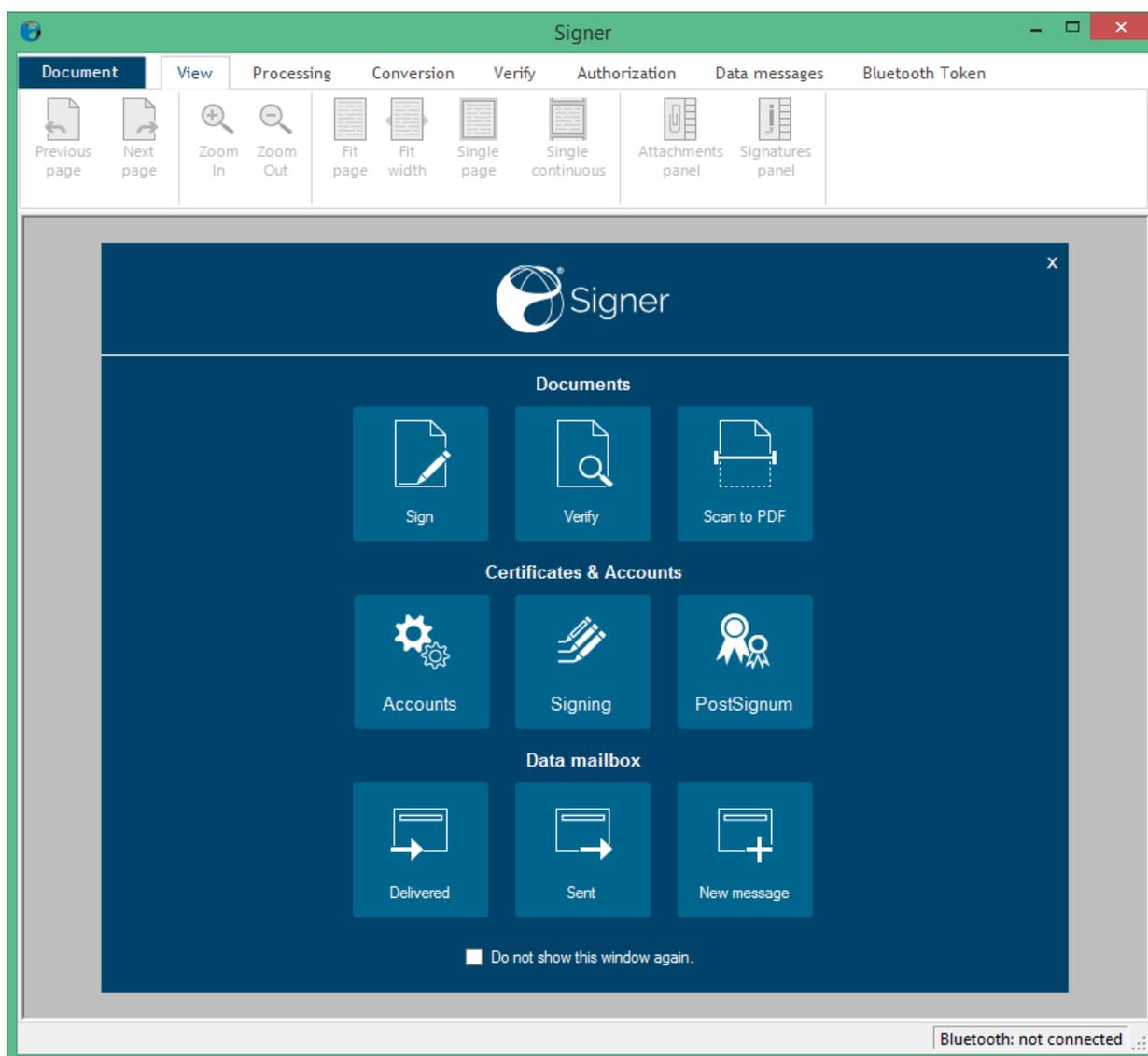
Please note that in this phase of acquiring a 602 ID, you have a TRIAL version with time-limited availability of services and with the number of time stamps limited to 25 – if you want to continue using *Signer* without limits, you need to purchase a full license within 14 days (for more details, see page 56).

4. Quick overview of basic features

Software602 Signer allows you to handle files and data mailboxes in various ways. Some of these ways will be probably used more often than others, and we will describe them now in this overview.

4.1. Access to basic features and their overview

The application's basic features can be accessed by large buttons on the desktop of the Signer window. These features are as follows.



The Documents button group:

- **Sign** – allows you to attach an electronic signature and a qualified time stamp to a document (PDF and Microsoft Office documents).
- **Verify** – validates digital certificates for the inserted document. Validation is available for more than 180 certification authorities (qualified trust service providers), both from the EU and global ones – you can find the list [here](#).

- **Scan to PDF** (scanning to PDF with OCR support) – captures an original using a scanner with the TWAIN interface and allows its conversion into a PDF document – with the option to secure the document by an electronic signature and a time stamp.

The Certificates & Accounts button group:

- **Accounts** – displays the **Login** tab of the configuration dialog with an overview of application login details.
- **Signing** – displays the **Visualized Signature** tab of the configuration dialog to set up the visualized signature, which can be attached to signed documents.
- **PostSignum** – displays the **PostSignum Certificates** tab of the configuration dialog where you can manage electronic certificates.

The Data Mailbox button group:

- **Delivered** – displays the contents of the data mailbox (received data messages).
- **Sent** – displays the contents of the data mailbox (sent data messages).
- **New message** – opens the dialog for creating and sending a data message.

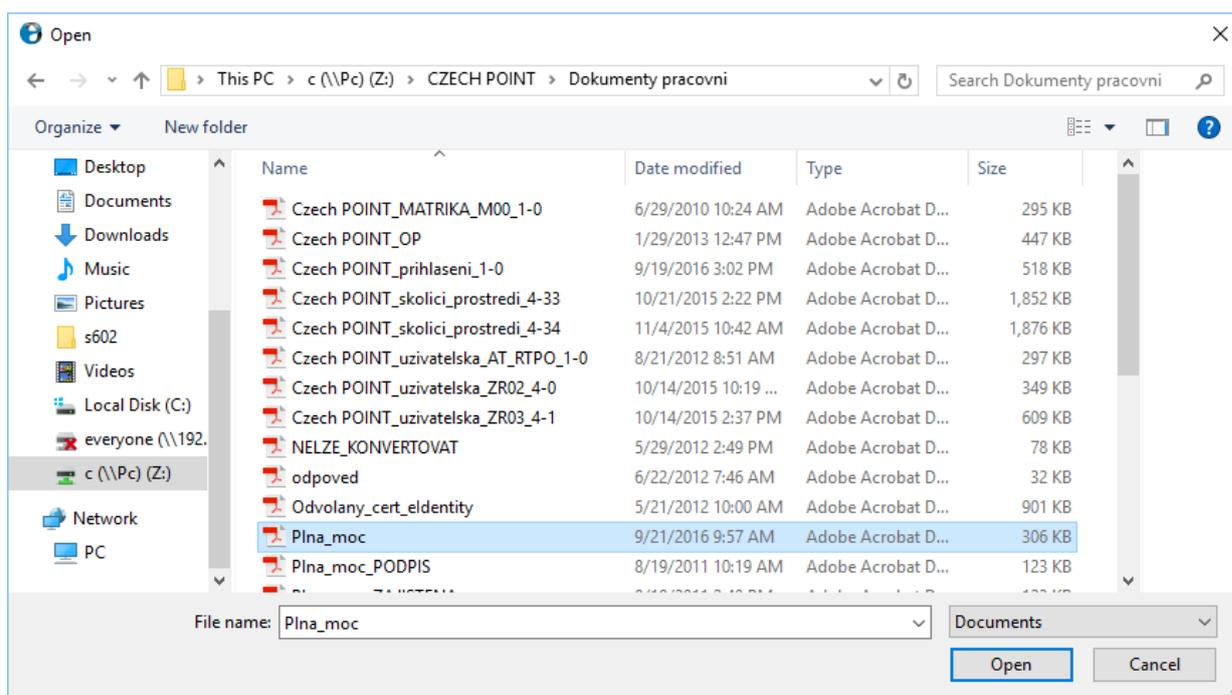
If you check **Do not show this window again**, the button panel will not be displayed on the next application start.

4.2. Selecting a file for further processing

Most of the application's features are related to a file that you need to specify. The procedure is similar for all the features and therefore we will describe it only once, separately.

To select a file (e.g. after clicking one of the large buttons such as **Sign** or **Verify**), the **Open** dialog is displayed. Use it to navigate to the file you want to use and click the **Open** button to load it in the application.

To make the file selection easier, a file type list is placed above the **Open** button – setting it to one of the options will display only the files of the corresponding type. Usually only PDF documents are relevant, but the available options depend on the feature for which you are opening the file.



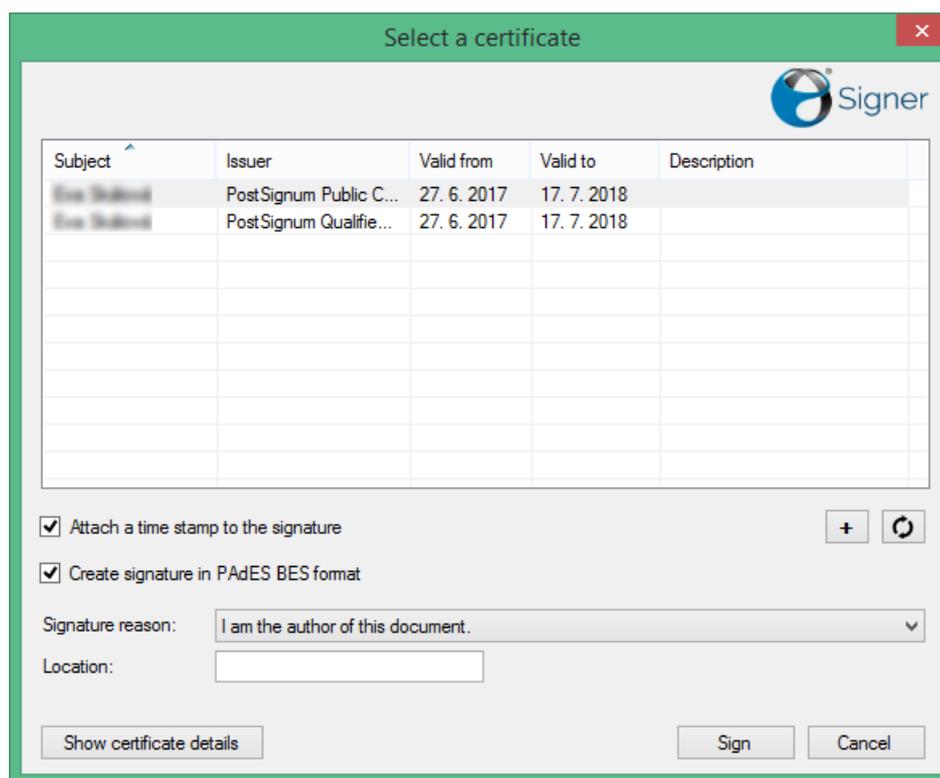
The file selection is followed by the action requested by the large button.

4.3. Attachment of an electronic signature and a time stamp to PDF documents

If you need to provide a PDF document with an electronic signature and possibly a time stamp too, click on the large **Sign** button.

When you select and load the document to be signed (timestamped), the document's first page is displayed on the application's desktop and the **Select a certificate** dialog is displayed.

The dialog lists all the certificates available to you with information on the issuer and expiry date.



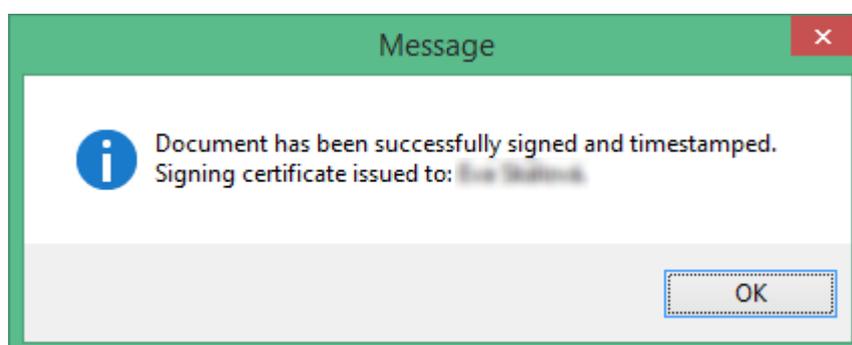
If a certificate is missing from the list, you can import it now using the button with the “plus” symbol. Click it to open the Certificate Import Wizard, which will walk you through the import. Click the button next to it, marked with a double circular arrow, to place the certificate in the list.

If you want to attach a time stamp to the document along with the signature, check **Attach a time stamp to the signature**.

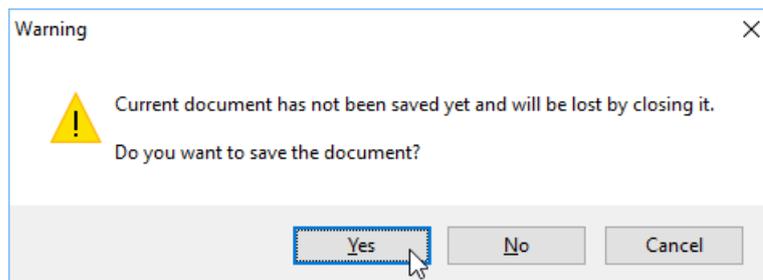
If you check **Create signature in PAdES BES format**, the signature will be attached in compliance with the PAdES (*PDF Advanced Electronic Signatures*) standard, which deals with signing PDF documents to provide long-term validity.

You can also attach the **Reason for signing** by selecting one of the options from the list. When you have set all the parameters in the dialog, click **Sign**.

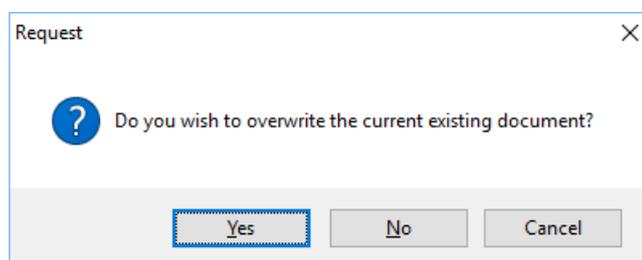
You will be notified about the end of the operation by the message **Document has been successfully signed**.



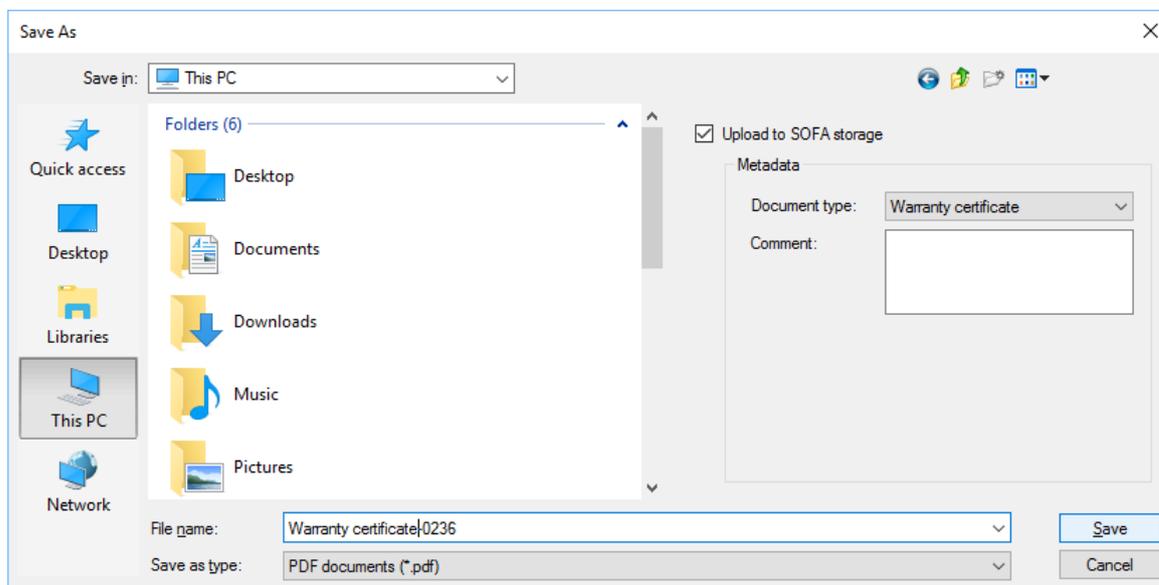
The changes to the document must be saved to the document file. If you fail to do that and proceed to close the file, a warning will be displayed.



- Click **Cancel** to stop closing the document.
- Click **No** to close the document without saving.
- Click **Yes** to open a dialog window asking whether you want to save the signed document in the original file or create a new document.



If you click **Yes**, the signed version will overwrite the original document. Clicking **No** will open the **Save as** dialog where, as the title suggests, you will be asked to specify the folder and file name for saving the document. If you check **Save to SOFA storage**, the signed document will not be saved on the disk, but in SOFA storage.

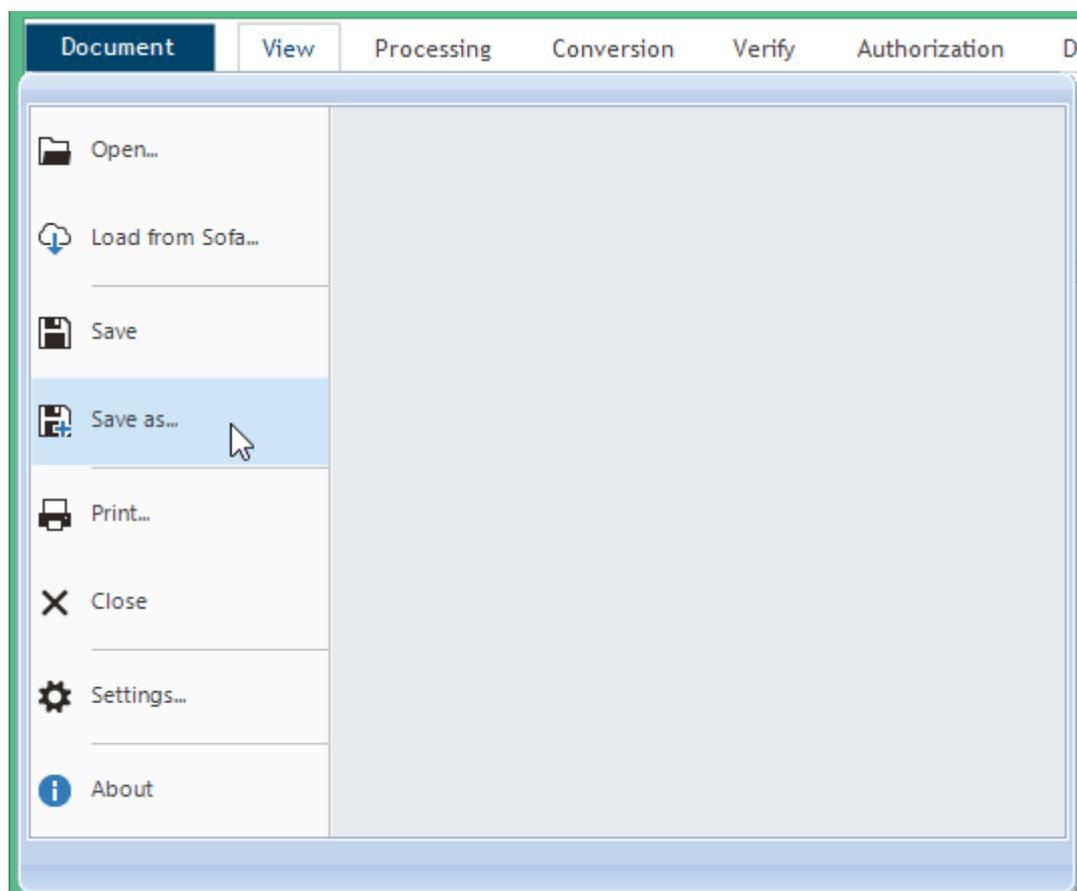


Saving to SOFA will allow you to specify so-called metadata for the file:

- **Document type** – select the type of document from the list (e.g. contract, order, etc.).
- **Comment** – you can enter any document description in this field.

When you set the saving method, click **Save**.

To save a signed (and stamped) document, you can also use the **Save as...** option from the **Document** menu.



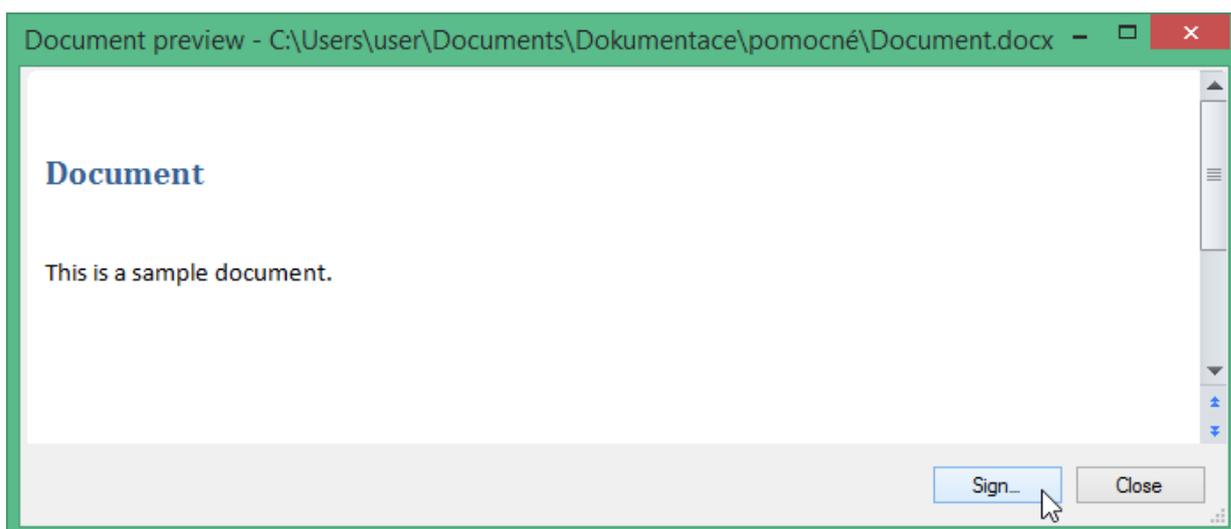
When the document is saved, you can close it by selecting **Close** from the same menu.

4.4. Differences in attaching the signature and time stamps to documents

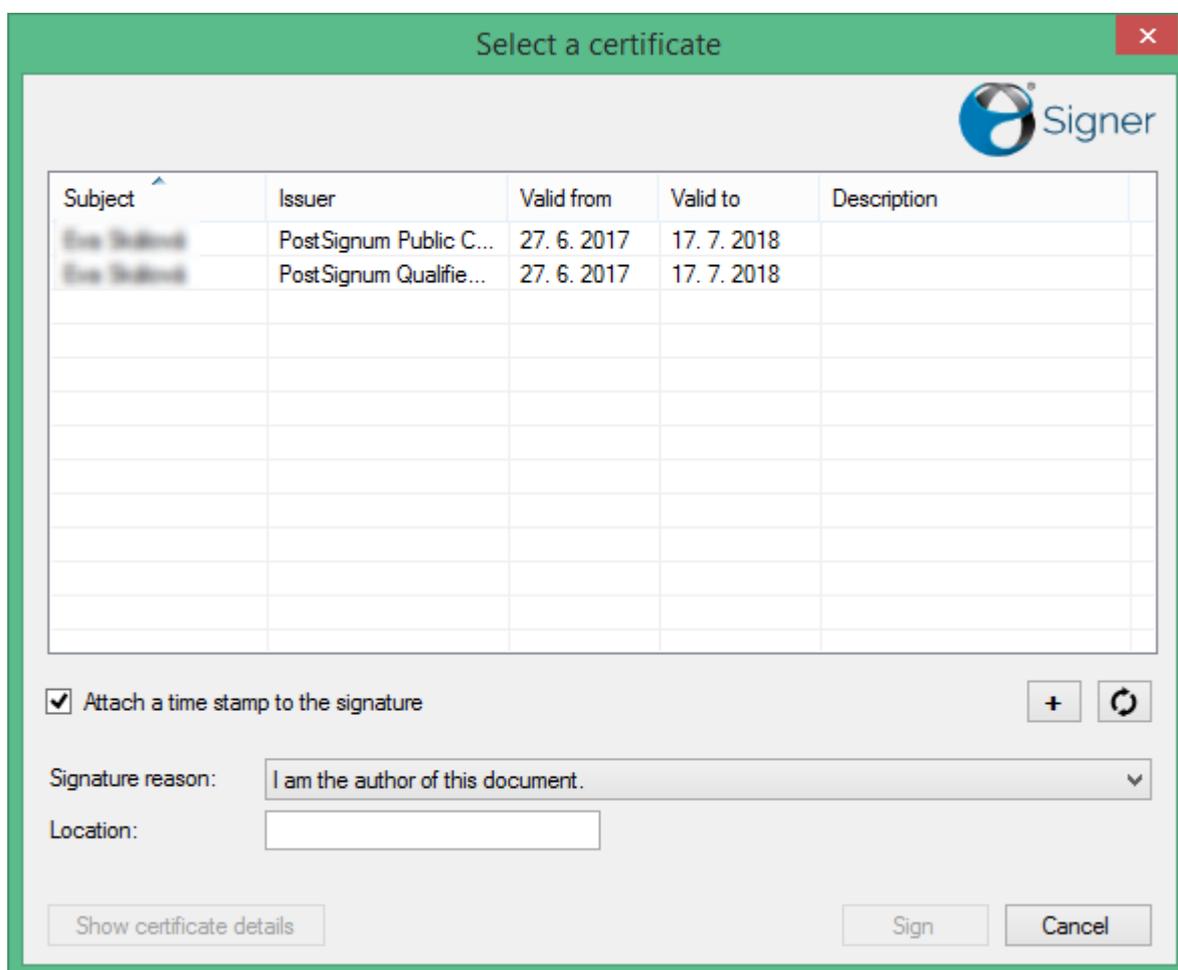
This feature is useful when you need to attach an electronic signature and optionally a time stamp to Microsoft Office documents, versions 2007 and above (documents created in Word, Excel, PowerPoint, etc.) and to Open Office documents.

Click the large **Sign** button to open the document.

After you select the file to sign (and time stamp), a preview of the selected document is displayed.



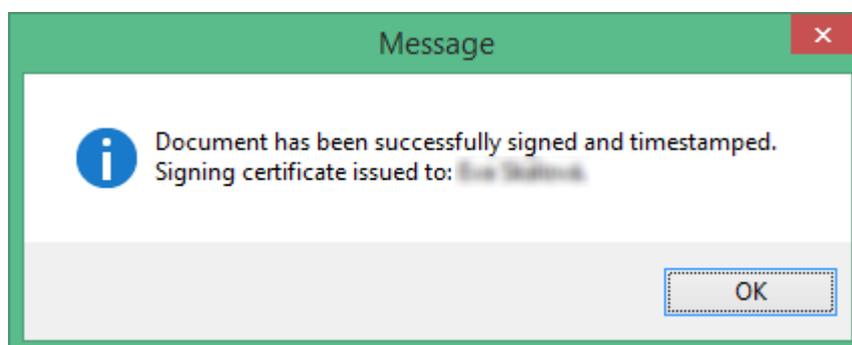
If it is the file you want to sign, click **Sign**. The **Select Certificate** dialog is displayed.



This dialog also allows finding and installing new electronic signature certificates. If you want to attach a time stamp to the document along with the signature, check **Attach a time stamp to the signature**. As with the PDF format, you can select a **Signature reason** from a drop-down menu. For Microsoft Office documents, the option **Create signature in PAdES-BES format** is inactive, because this option applies to signing PDF documents only.

When you have set all the parameters in the dialog, click **Sign**.

You will be notified about the end of the operation by the message **Document has been successfully signed with certificate xxx and timestamped**.



Then save the signed document to a selected file. The document will be saved in the original format – as an Office document (spreadsheet, etc.); it is not converted to PDF.

4.5. Certificate validation

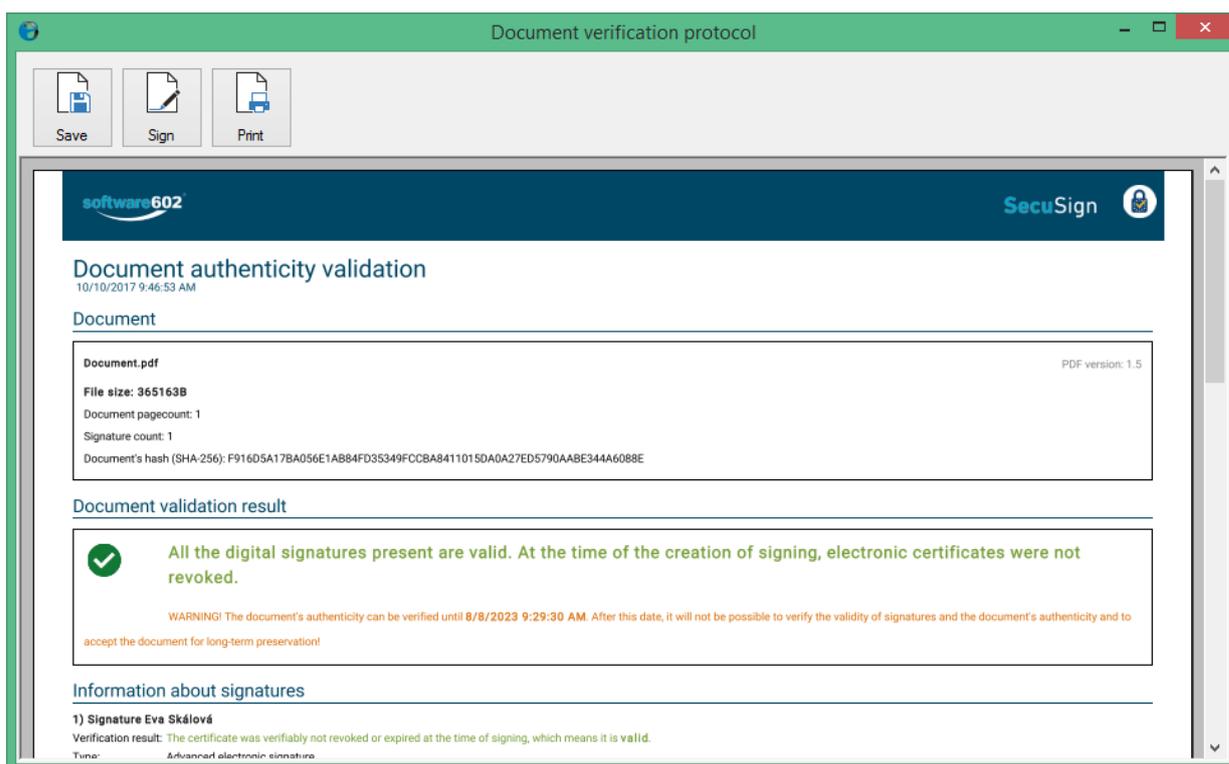
This feature allows you to find out whether a document is signed with a digital signature and when it is, validate the signature (including a time stamp if there is one).

Click the large **Verify** button.

Select and load a file for certificate validation. If it contains at least one signature, the following dialog is displayed. To verify the signature(s), click **Verify**.



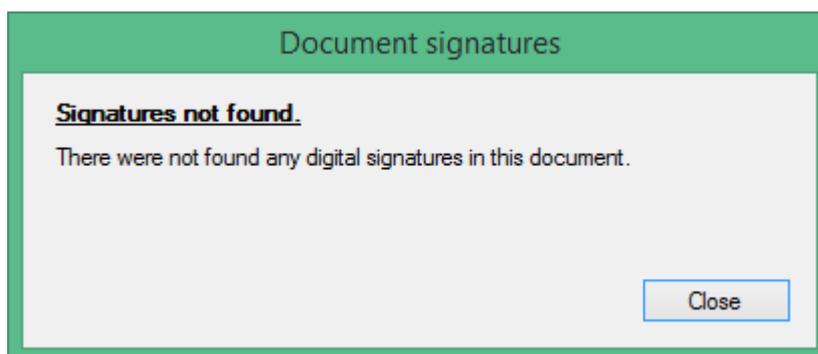
The verification process might take some time. After verification, a new window titled **Document verification protocol** is displayed with a validation statement for a signature based on a qualified means, or for all signatures (and time stamps) attached to the document. It is a validation clause from [Secusign Validation](#) qualified service.



To keep the verification data, you can save the document to a PDF file using the **Save** button.

You can also digitally sign the document (and provide with a time stamp) before saving – click **Sign** to open the **Select a Certificate** dialog in the same manner as when signing any PDF document. If you need to print out the verification document, click **Print**.

If the document is not digitally signed, the verification process cannot be run and the application displays a corresponding message.



4.6. Scanning documents to PDF

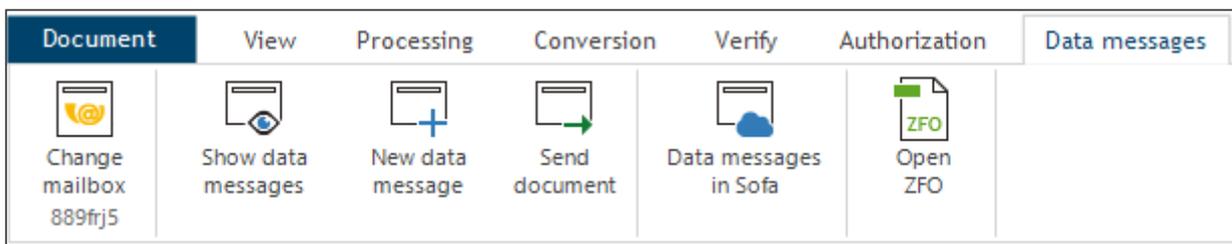
Click the large button **Scan to PDF** to create a PDF document from a paper original and, if needed, provide it with additional features such as an electronic signature, a time stamp or save it in an archival format, PDF/A.

Using this feature requires a scanning device connected to the computer, with a TWAIN interface available.



5. Using the data mailbox

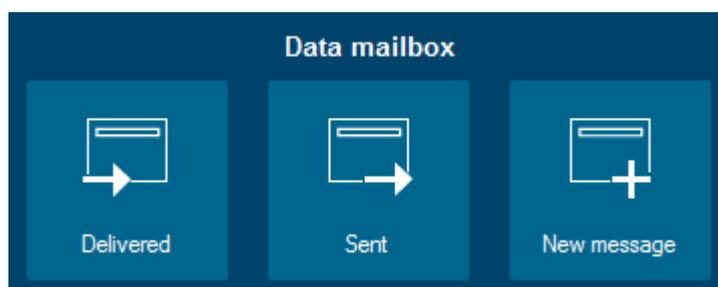
You can access your data mailbox from within the **Signer** and handle it in the same way you would in the usual DMIS environment. To handle data mailboxes, use the set of buttons placed on the toolbar under the tab **Data messages**.



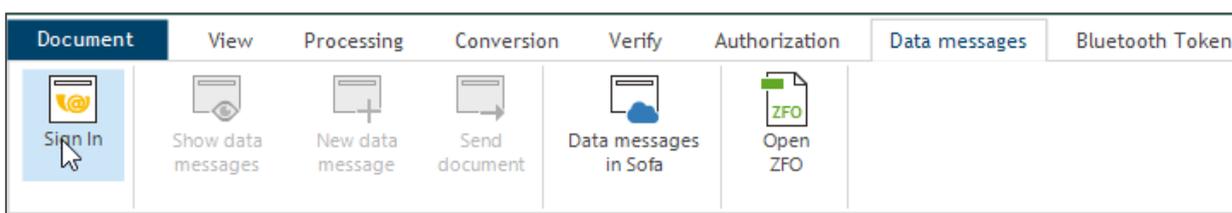
You can also access the basic features using the three large buttons placed in the third row of the start window.

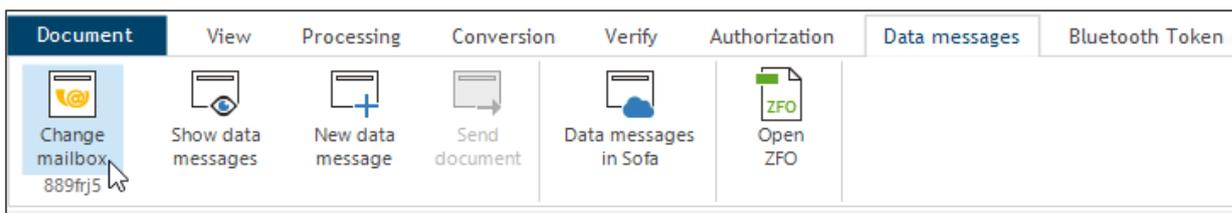
5.1. Data mailbox login

The group of three large buttons labeled **Data mailbox** is designed for managing the data mailbox fast.

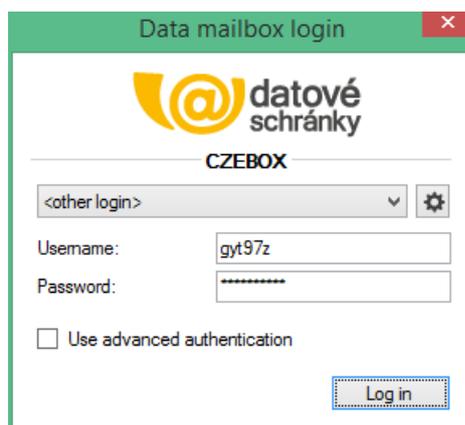


Before you start working with data messages, after clicking any of the three buttons, you will need to sign in to your data mailbox. You can also sign in any time while working with document by clicking the **Sign In** button on **Data messages** toolbar tab. If you have already signed in to a mailbox, the button changes to **Change mailbox** and shows the current mailbox ID; click the button if you want to switch to another mailbox.





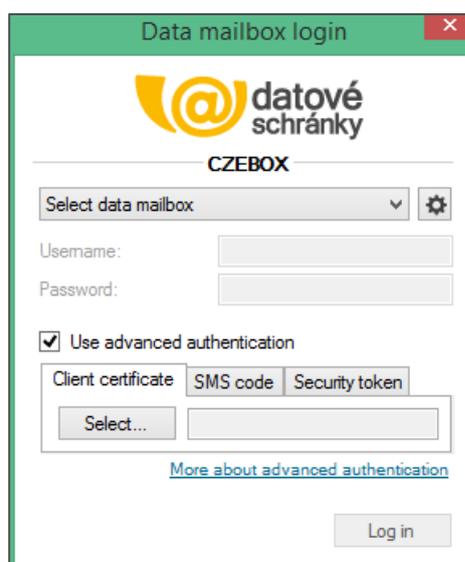
To sign in to a data mailbox (or switch to another data mailbox), the window **Data mailbox login** is displayed.



The drop-down menu in the upper part of the dialog contains two items by default:

- **Select data mailbox** – allows you to select a data mailbox from a list of previously set up data mailboxes; you can use the button next to the list to open the **Data Mailbox** tab in **Settings** and enter access details to another mailbox there.
- **Other login** – provides the simplest login method by entering the access details manually. Requires the knowledge of user name and password. Enter them into the corresponding fields and click **Log in**.

You can access the other login methods by checking **Use advanced authentication**.



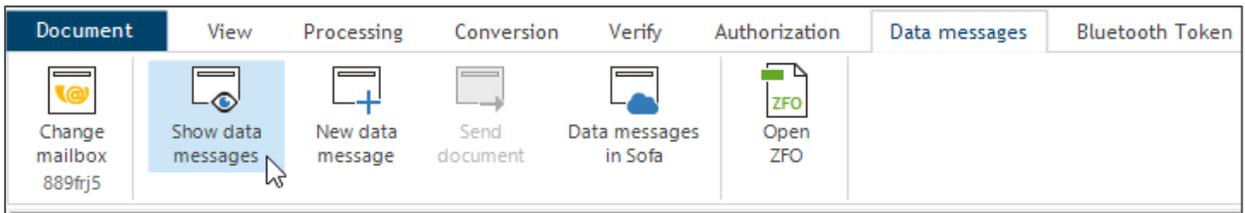
There are three methods of advanced access security. In addition to the user name and password, you will need to enter a client certificate, a code from a text message or a

security token. Select the security method by clicking one of the tabs **Client certificate**, **SMS code** or **Security token**. Then enter the required value in the entry field and click **Select**.

5.2. Checking delivered data messages

You can display the list of data messages received in your data mailbox by clicking the large **Delivered** button. Of course you need to be logged in to the data mailbox.

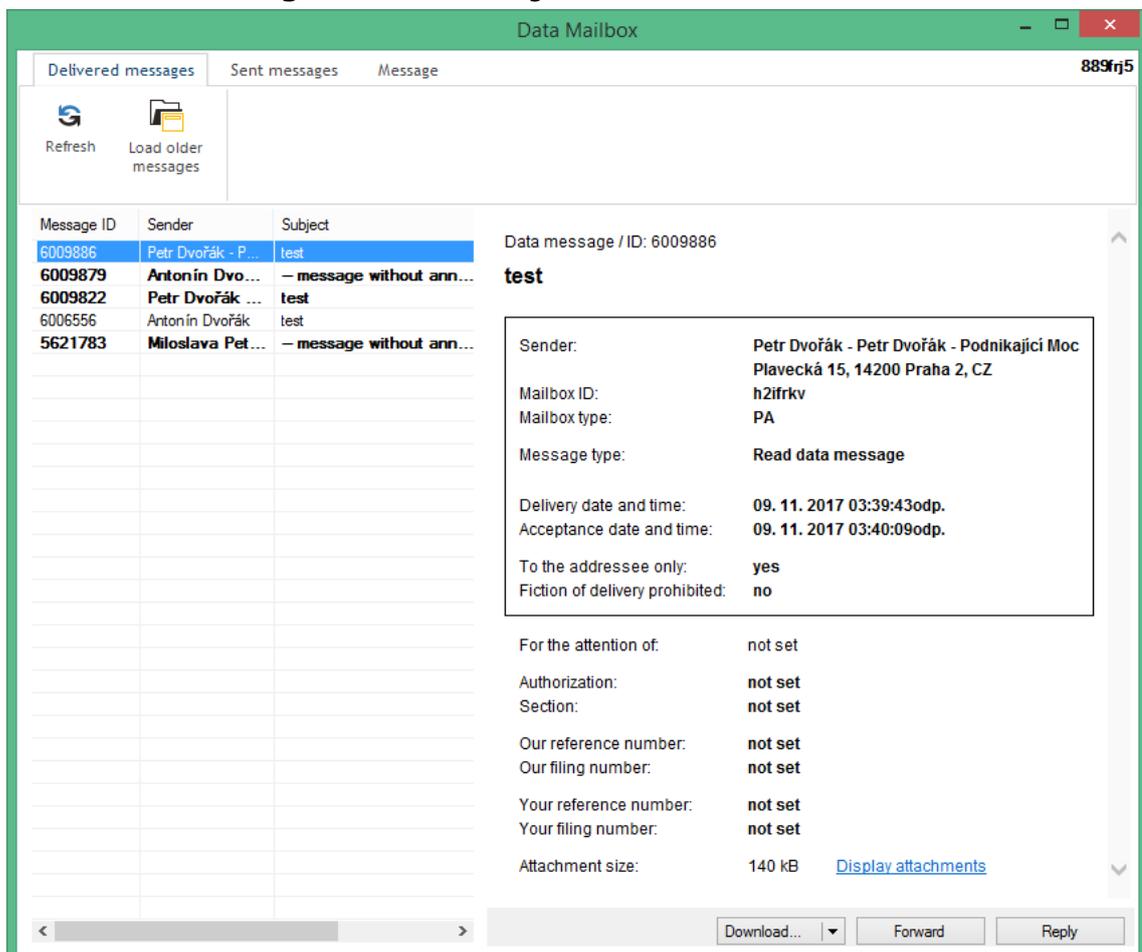
You can also use the **Show data messages** button on the **Data messages** tab of the toolbar to display the same list.



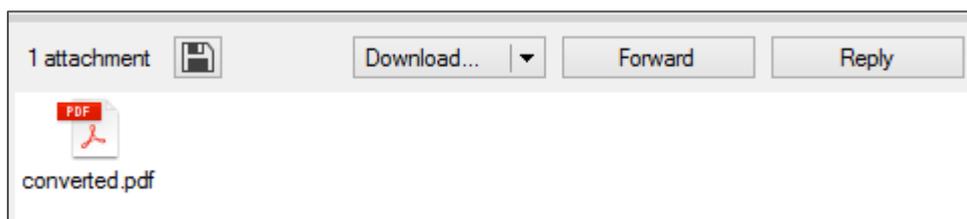
The window displaying the list consists of two parts. The left side contains the list of data messages in the mailbox. Select one of the messages (by a mouse click) to display its details in the right section of the window.

There are two buttons placed on the left above the list:

- **Refresh** – checks for new messages that might have been delivered since displaying the list.
- **Load older messages** – adds messages with older dates to the list.



The displayed detail of a data message contains an important link, **Display attachments** – click it to open the most interesting part of the message – a window with a list of attached files.



The individual files are listed as icons showing the file type along with a description containing its name. Click the icon to open the file in an application associated with the file type; then you can work with the file as usual.

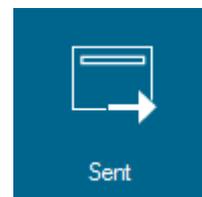
If you want to save the attached files to your local disk, click the button in the upper left corner of the window. Select the target folder and all the attached files will be saved there.

You can use the **Download** button to save the whole data message or its return receipt to the disk, both provided with a digital signature. When you click the button, a local menu opens with two items: **Signed message in ZFO format** and **Signed delivery info in ZFO format**.

Use the **Forward** and **Reply** buttons to deal with the data message similarly to common electronic mail. If you select to forward the message, the same attachment as in the received message is automatically included, and you can add your own files to it.

5.3. Checking sent data messages

You can display the list of data messages sent from your data mailbox by clicking the large **Sent** button. Of course you need again to be logged in to the data mailbox.

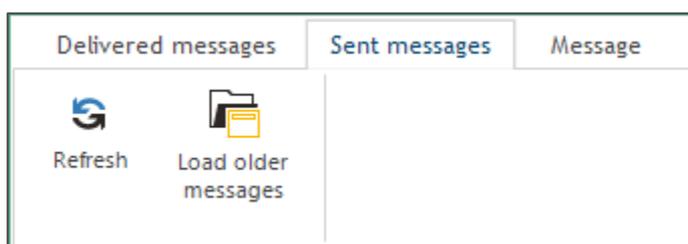


The window displaying the list similarly consists of two parts. The left side contains the list of data messages sent from the mailbox. Select one of the messages (by a mouse click) to display its details in the right section of the window.

Manage the list of sent data messages in a similar manner to the list of delivered messages.

Use the **Sent messages** item to forward the message or save it either whole or as a return receipt.

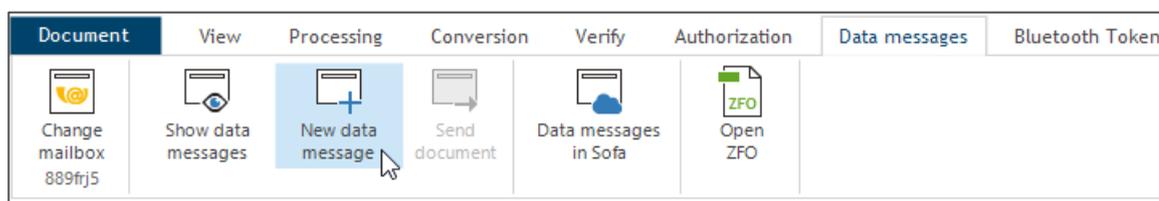
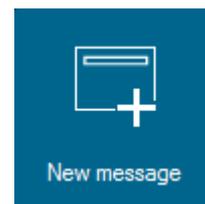
You can switch between the delivered and sent message window using the **Delivered messages** and **Sent messages** tabs in the upper part of the window.



5.4. Creating and sending a new data message

Open the window for composing and sending data messages by clicking the large button **New message**.

You can also use the **New data message** button on the **Data messages** toolbar tab for the same purpose.



Compose the message in the **New Data Message** window.

To specify the recipient (target data mailbox), you can use the **Mailbox Type** drop-down list (Individuals, Entrepreneurs, Public Authorities, etc.).

Enter the mailbox's identification or its part into the **Recipient** field and use the **Search type** selector to choose whether to place a general search or using the address, specific mailbox ID or the organization's identification number. As you type the characters in the **Recipient** field, the list of matching mailboxes is filtered according to the entered characters.

Use the **Subject** field to give the data message a descriptive title – as in the **Subject** field of e.g. electronic mail.

Additionally, you can use the **Accompanying text** field to provide a longer description of the data message – it will then be converted into a PDF file and attached to the data message.

New Data Message

Mailbox type: All mailboxes

Recipient: Antonín Dvořák ✓

Subject: Invoice correction

Search type:
 General
 Address
 Mailbox ID
 Company ID

Accompanying text: Please find enclosed the correct invoice. I apologize for the mix-up.

A new PDF attachment will be created from this text upon sending.

Attachments

You can attach up to 900 documents. Please note that maximum total attachment size is 20 MB.

File	Size
Document2.pdf	355,4 kB

Buttons: Add..., Move up, Move down, Remove

Files: 1 (355,4 kB)

Authorization: [] / [] \$ [] paragr. [] point []

Our ref. number: [] Our filing number: []

Your ref. number: [] Your filing number: []

For the attention of: [] To the addressee only

Send

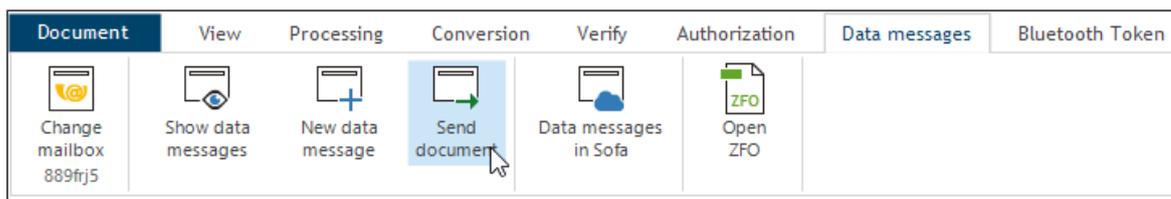
The **Attachments** window serves for composing the contents of the data message – you can specify up to 900 documents with the total size of up to 20 MB. For each document, click **Add** to open the file selection dialog and select the document.

Use the **Move up**, **Move down** and **Remove** buttons to sort the items in the list or to remove documents added by mistake. The current size of the attachment is displayed by an indicator in the lower right corner of the **Attachments** window.

The group of controls in the lower part of the window can be used to enter additional details – authorization identification, sender's or recipient's reference number, sender's or recipient's filing number, whether the data message is to be delivered to the attention of a specific person (generally it might be delivered to the whole organization) and if it is, whether it is to the addressee only.

Send the composed message by clicking the **Send** button.

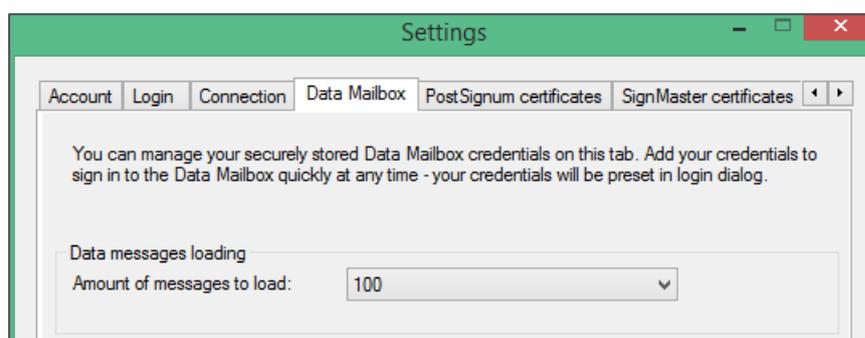
Another option is the **Send document** button on the **Data messages** tab of the toolbar. Clicking it will open the **New Data Message** dialog over the document currently loaded in Signer. The document will be automatically included in the new data message which you can then complete as described above.



5.5. Setting the number of displayed data messages

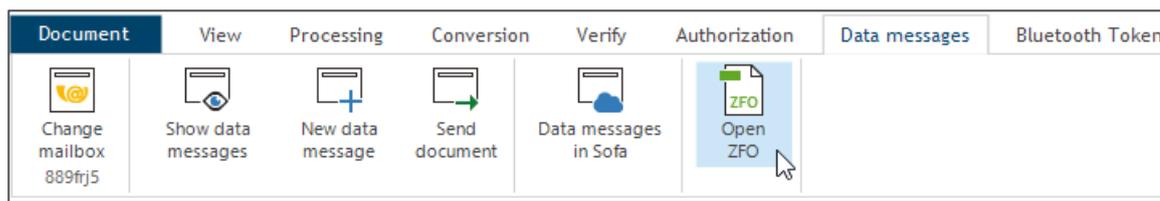
You can use the **Settings** dialog and its **Data Messages** tab to set the number of data messages loaded in lists displayed in the **Data Mailbox** window.

Use the drop-down list **Data messages loading** in the **Settings** dialog to set the number of displayed messages to all or only the last 100, 500 or 1000 items.

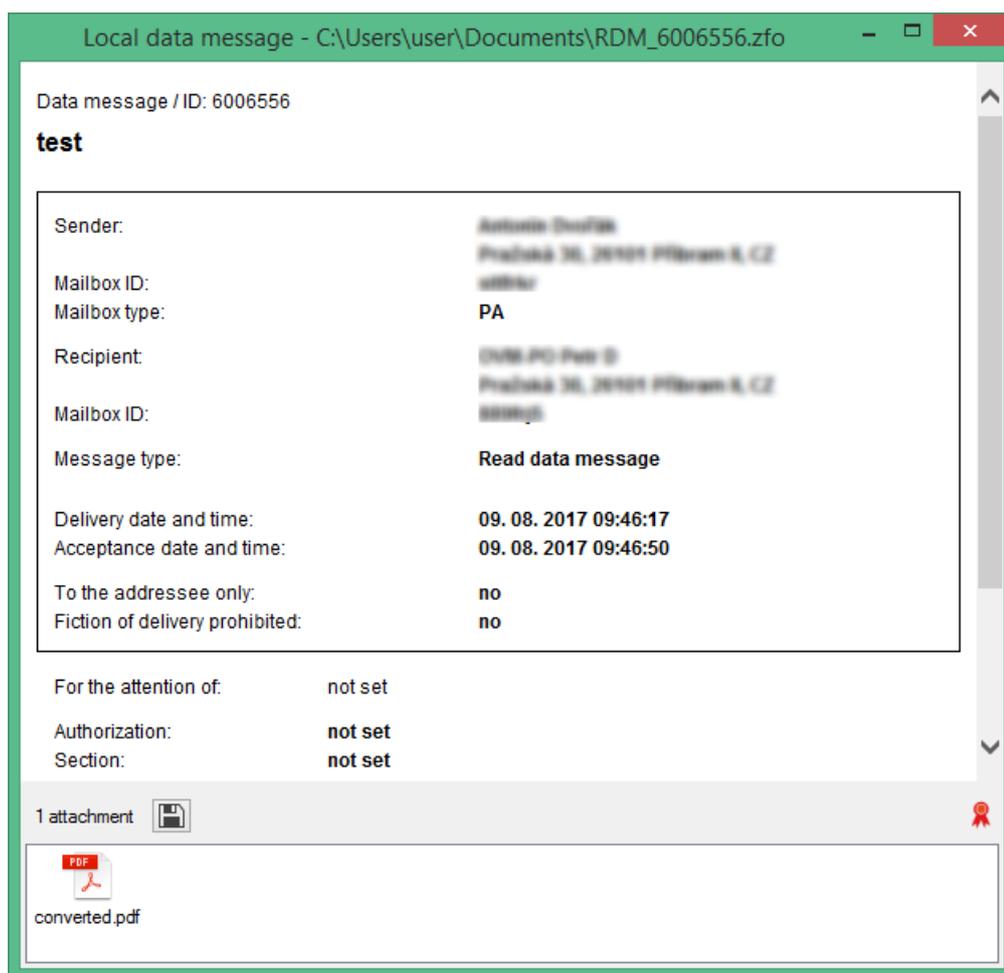


5.6. Loading a saved data message

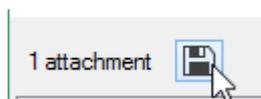
You can load a data message saved to a disk as a ZFO file into the Signer window. Go to the **Data messages** toolbar and click **Open ZFO**. In the standard file opening dialog, select the file with the data message to be displayed.



File details will be loaded in a separate window regardless of the document currently loaded in the application. The lower part of the window contains icons for the files attached to the message. Use them to open and view the files.

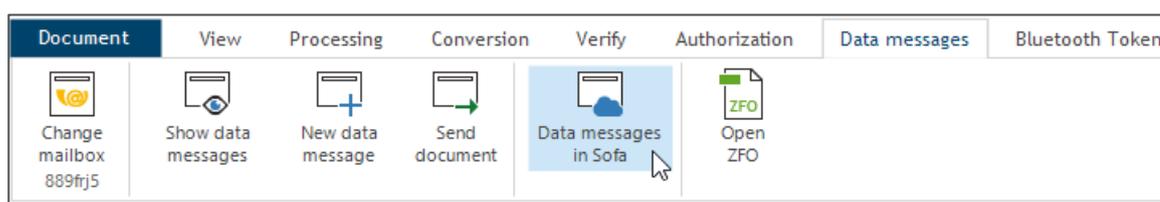


Clicking the button placed to the right of the information on the number of attachments will allow you to select a folder and extract and save all the attached files to it.



5.7. Loading a message from Sofa

If you have the corresponding rights, you can also load messages from the *Sofa* store. Go to the **Data messages** tab and click **Data messages in Sofa**. Select the required data message from the list and display it in the *Signer* window.

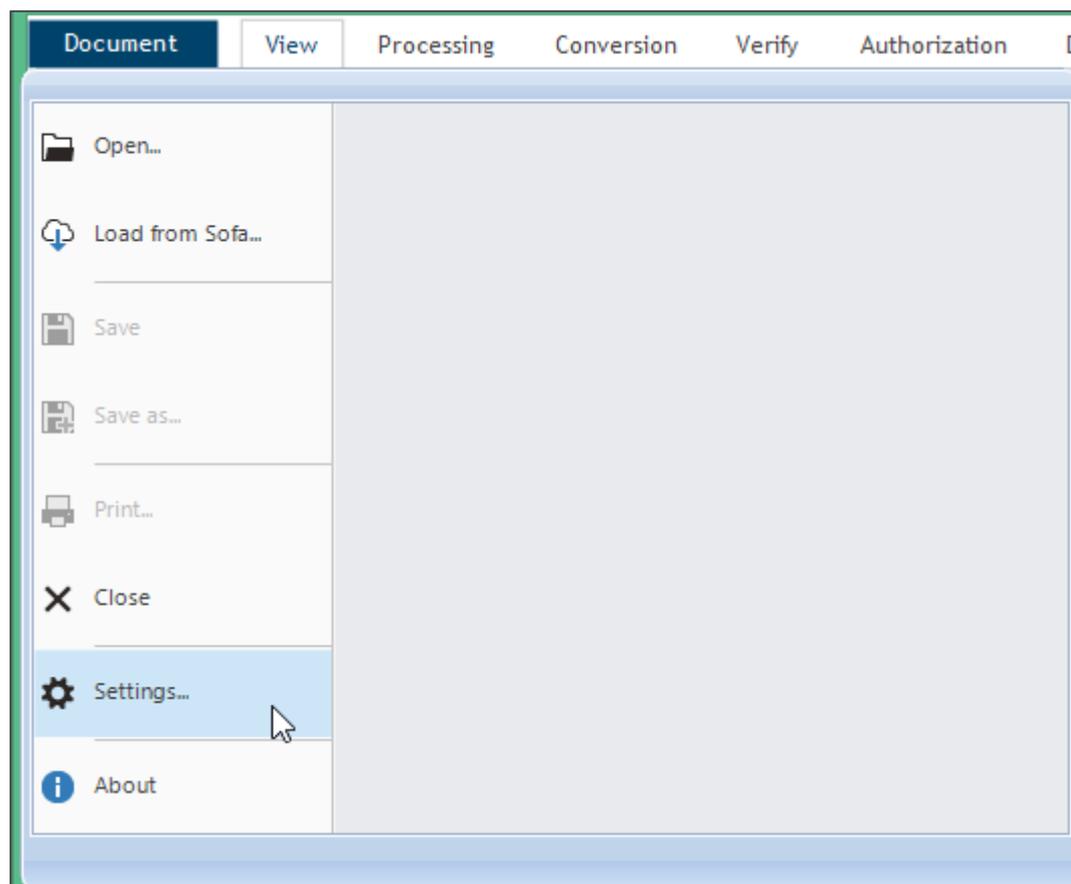


6. Controlling the application

6.1. Working with files

As has been stated before, documents must be loaded from files before they can be processed by Software602 Signer and afterwards must be saved to files again. The application is mostly used for processing documents saved in PDF format, but also “office suite” files and image files.

To manipulate files, use the commands from the menu opened by clicking on the **Document** label.



6.1.1. Loading documents

If you want to process a document, open and load the file using the **Open** command. The command displays the same dialog for selecting the drive, folder and the individual file that you probably know well from other applications.

An alternative method is loading the file using the Sofa storage – the **Load from SOFA** command opens the list of documents stored in Sofa and enables you to select the document to work on.

The selected file is then loaded and displayed on the application's work area and you can start processing it.

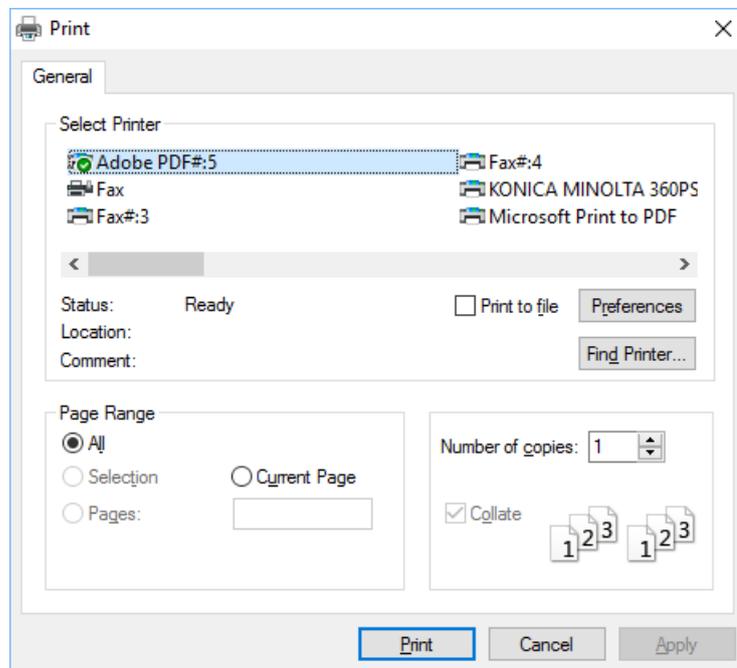
6.1.2. Saving documents

Every document that has been modified or added to in the application must be saved in a file. If you do not save the document, all the changes will be irrevocably lost.

To save a processed file, select the **Save** or **Save as** command. The **Save** command will save the document under the same name and in the same location it has been loaded from. When using the **Save As** command, use the usual system dialog to select where and to which file (or Sofa storage) to save the document. You can also save it to the same file from which it has been loaded – in such cases the application displays a warning that the original version will be overwritten.

6.1.3. Printing documents

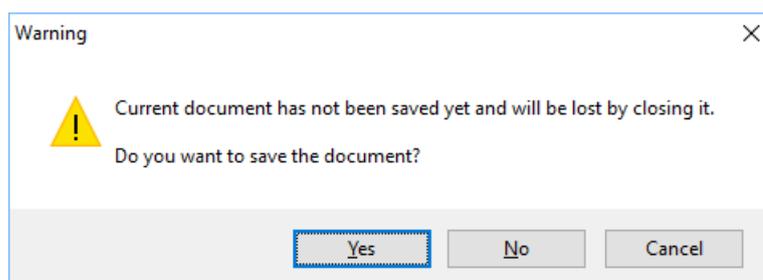
To print a document loaded in the application, select the **Print** command. The print parameters and the output device can be set in the following dialog, **Print**, whose layout and contents depend on your computer's operating system and hardware configuration.



6.1.4. Closing documents

To start processing another document, you must first close the current document. The current document is closed automatically if you select the **Open** command or you can close it manually by selecting **Close**. Use the same command to close a document you have opened by mistake.

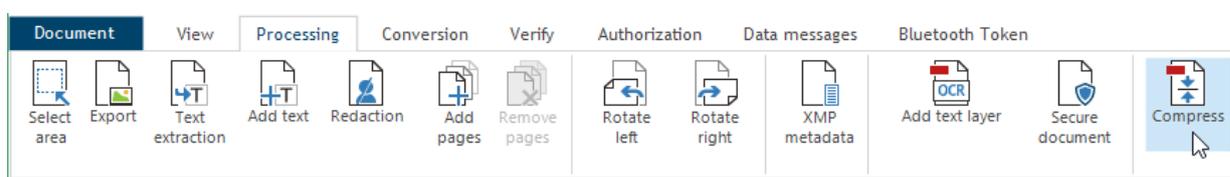
If you select to close a document that has been modified and has not been saved, a message warning you about data loss is displayed.



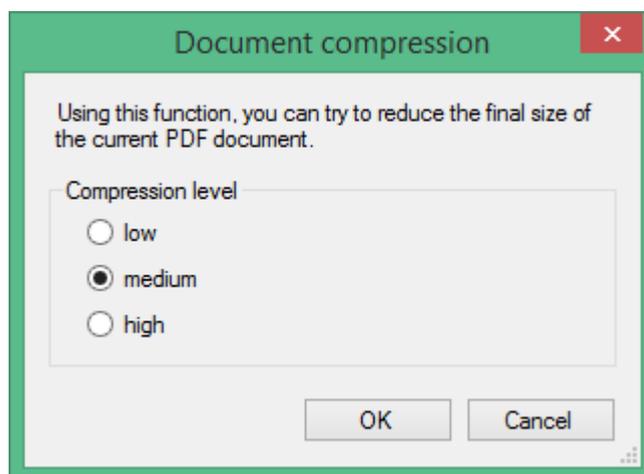
6.2. PDF document compression

When saving a PDF document loaded or created in the application and displayed in the work area, you can select the compression level.

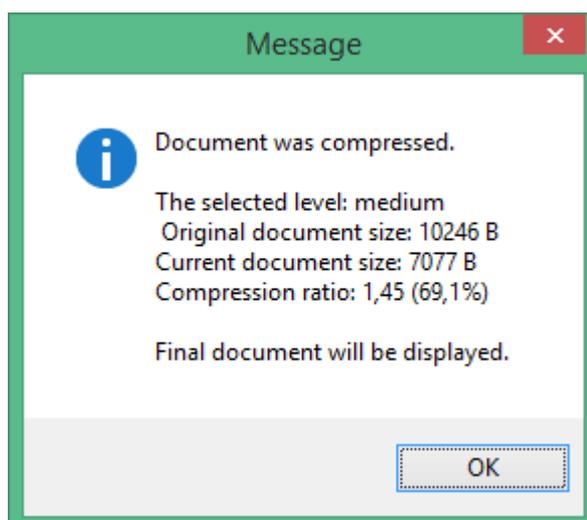
To set the compression level, select the **Processing** tab and click the **Compress** button.



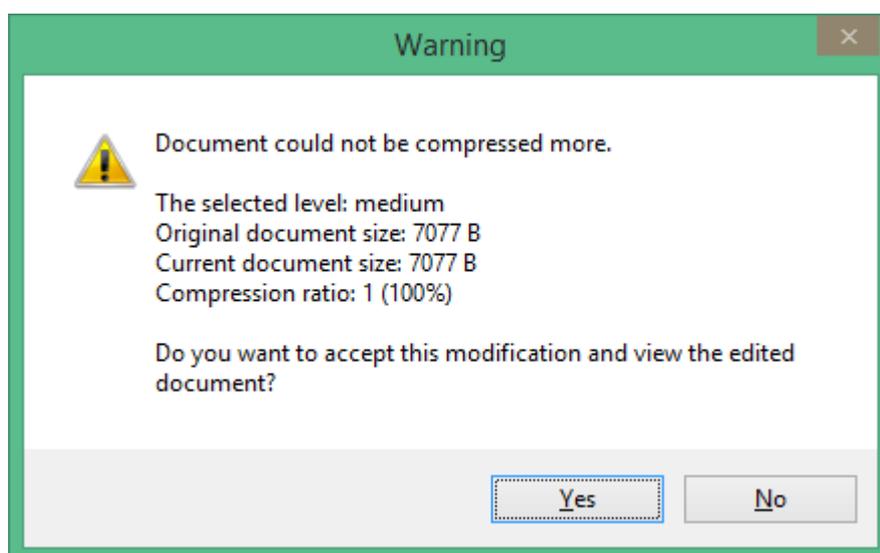
The **Document compression** dialog is then displayed with the **Compression level** field allowing you to select from low, medium and high compression level. The higher the compression, the smaller is the resulting file size and vice versa.



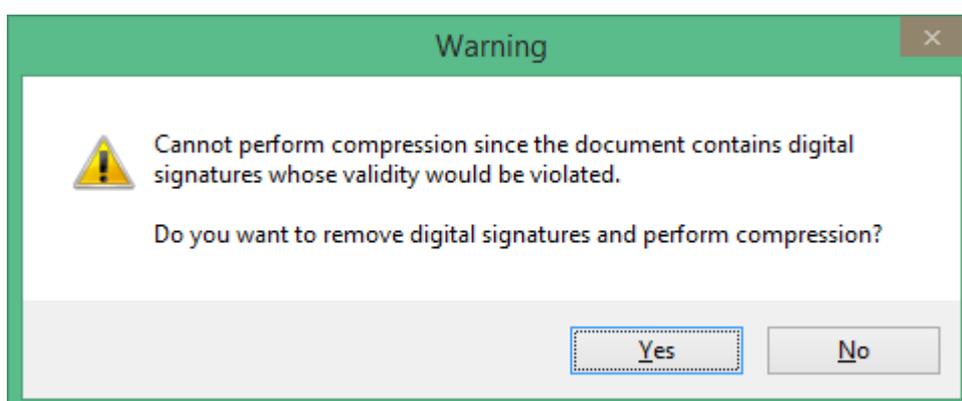
Information on the completed compression is displayed in the **Message** dialog.



In some cases it might not be possible to compress the document any more – then you will be informed about it in the message and you can only display the file for inspection.



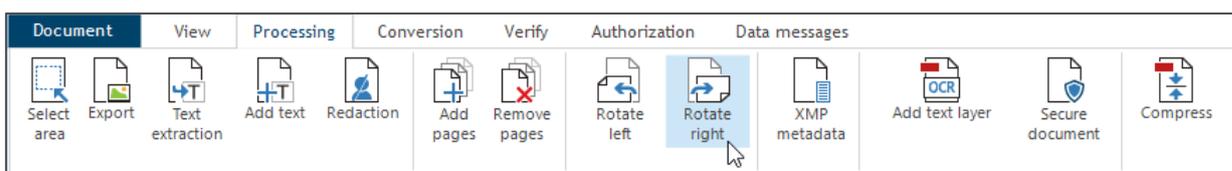
If the document is digitally signed, it cannot be compressed, because it would break the signatures' validity. But it is possible to remove the signatures, compress the document and then sign it again.



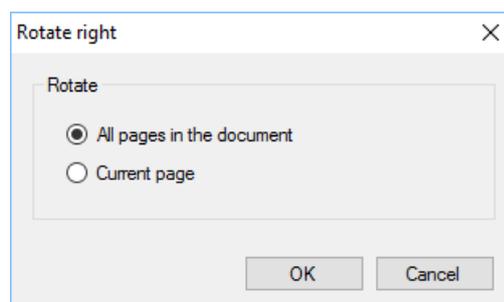
6.3. PDF document or page rotation

A PDF document loaded in the application or its page displayed in the application's work area can be rotated by 90 degrees to either side and then saved with this modification. You can use this feature for example when the document (created e.g. by conversion from a scan) is displayed rotated or upside down.

Open the **Processing** toolbar by clicking its label to access the rotation buttons: **Rotate left** and **Rotate right**.



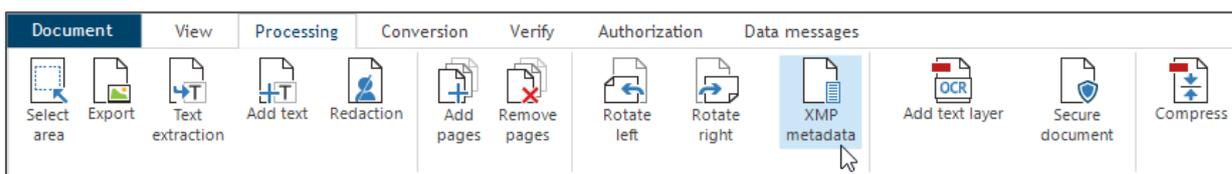
When you click one of the rotation buttons, a dialog window is displayed, where you can select to rotate **All pages in the document** or the **Current page**. Confirm the selection by clicking **OK**.



6.4. Metadata management

When a PDF document is loaded and displayed in the application's work area, you can check and adjust its metadata.

The **Processing** toolbar, which you can open by clicking its label, contains the corresponding button, **XMP metadata**.



Click the button to open the **Manage metadata** dialog.

Enter the document's description data in the fields. The data will be attached to the document as metadata. If such data already exists, you can use the dialog to edit it or add to it.

Manage metadata

Document metadata
You can edit XMP metadata of the current document.
Individual items separate by semicolon or newline.

Title:

Creator:

Contributor:

Publisher:

Description:

Subject and Keywords:

Version: 1.5
Created: Wednesday, October 14, 2015 2:37:06 PM
Application: Acrobat PDFMaker 9.1 pro Word
Changed: Wednesday, October 14, 2015 2:37:11 PM

OK Cancel

6.5. Digital signature visualization

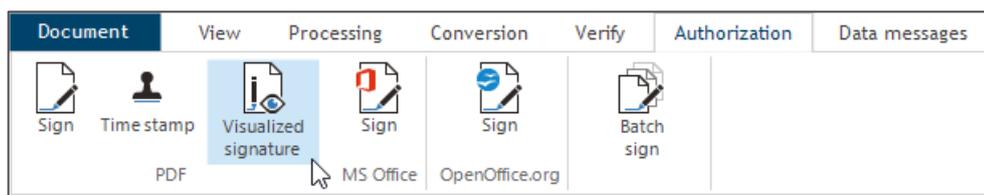
When documents signed by a digital signature are displayed for reading, they generally do not show the fact that they are secured in this way. It is easy to find out the validity of the signature and the time stamp, but on the first sight nothing displays the fact – *Yes, this document has been signed.*

This is why it is possible to visualize the signature(s). You can select the place in the document where to display graphical information with details on the signing person and the date and time of signing.

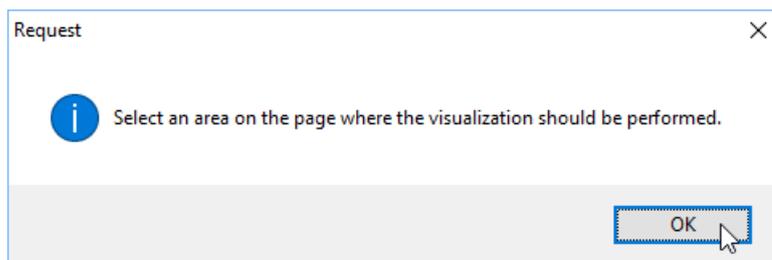
You can either use the standard visualization symbol included in the application or set up your own one – for example a logo or the image of your own handwritten signature scanned from a paper original.

6.5.1. Document signature with visualization

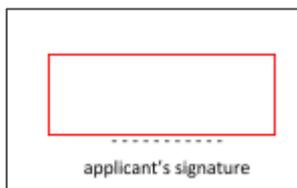
To attach a visualized signature to a document, open the **Authorization** toolbar by clicking the corresponding label. Click the **Visualized signature** button placed on the toolbar.



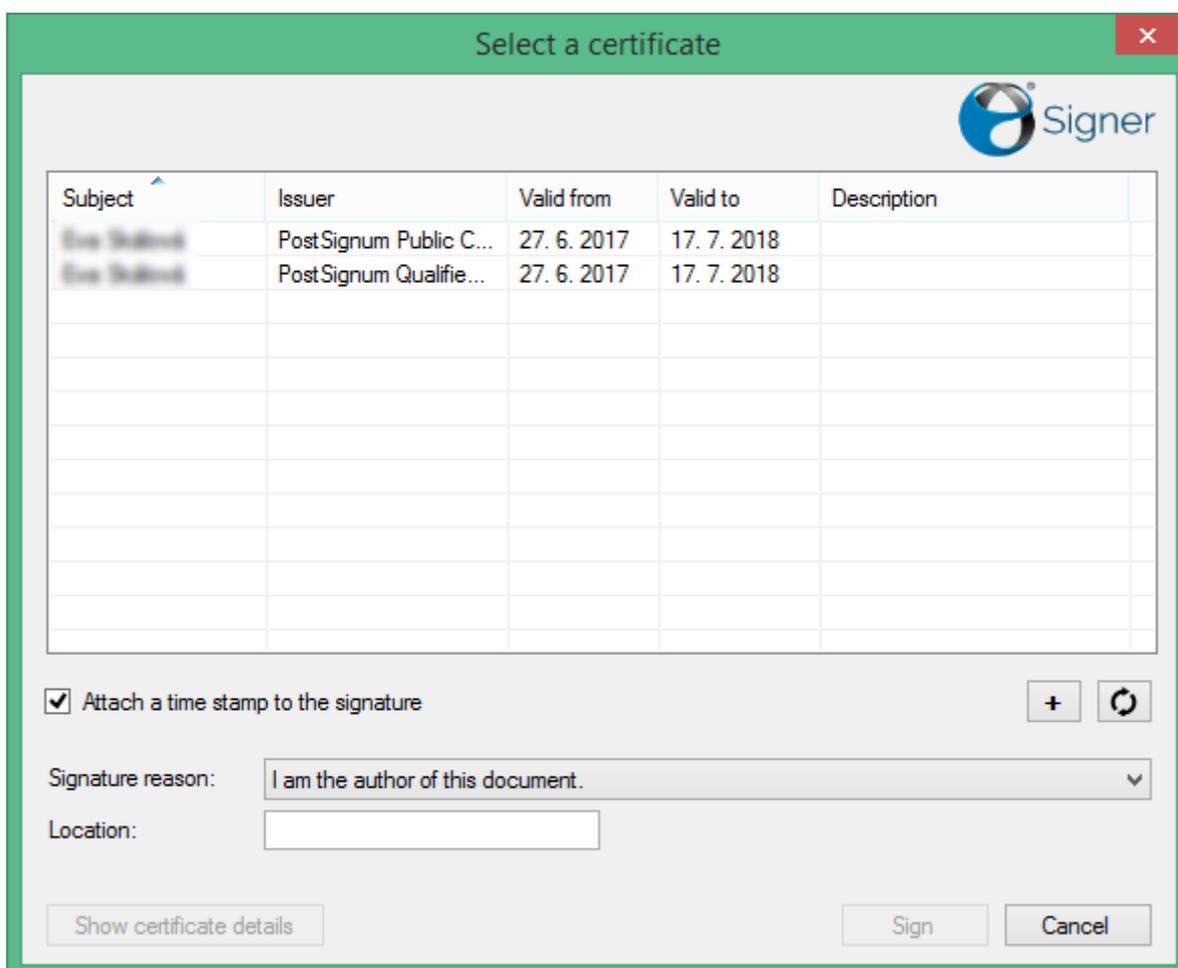
You will be asked to specify the area where to place the signature details.



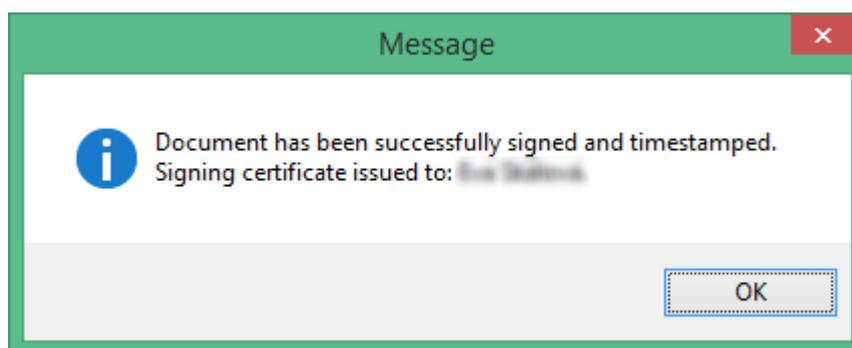
Select the area by dragging the cursor while holding the left mouse button down. The selected area will be highlighted by a red rectangle.



The selection is followed by a certificate selection dialog, where you can specify the certificate to use for signing the document.



Now click **Sign** to sign the document. You will be notified about it by the message **Document has been successfully signed with certificate xxx and timestamped.**



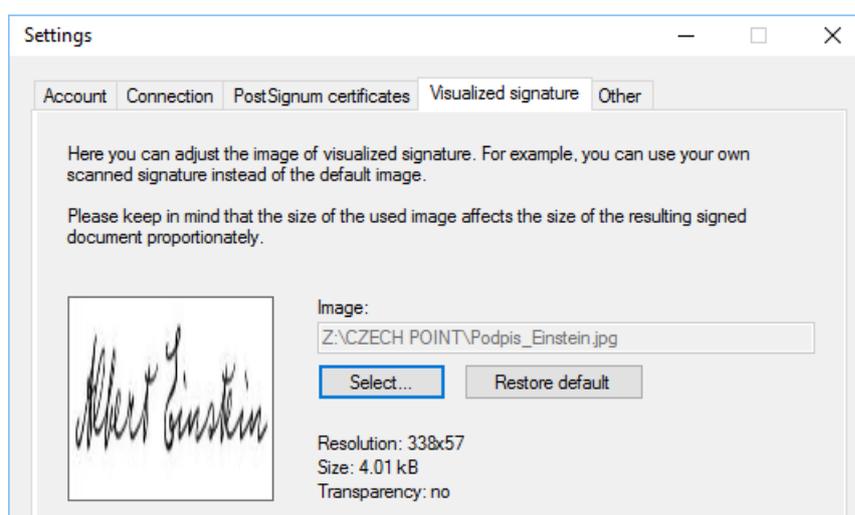
A graphical symbol and signature details are placed at the selected area.



6.5.2. Setting your own visualization image

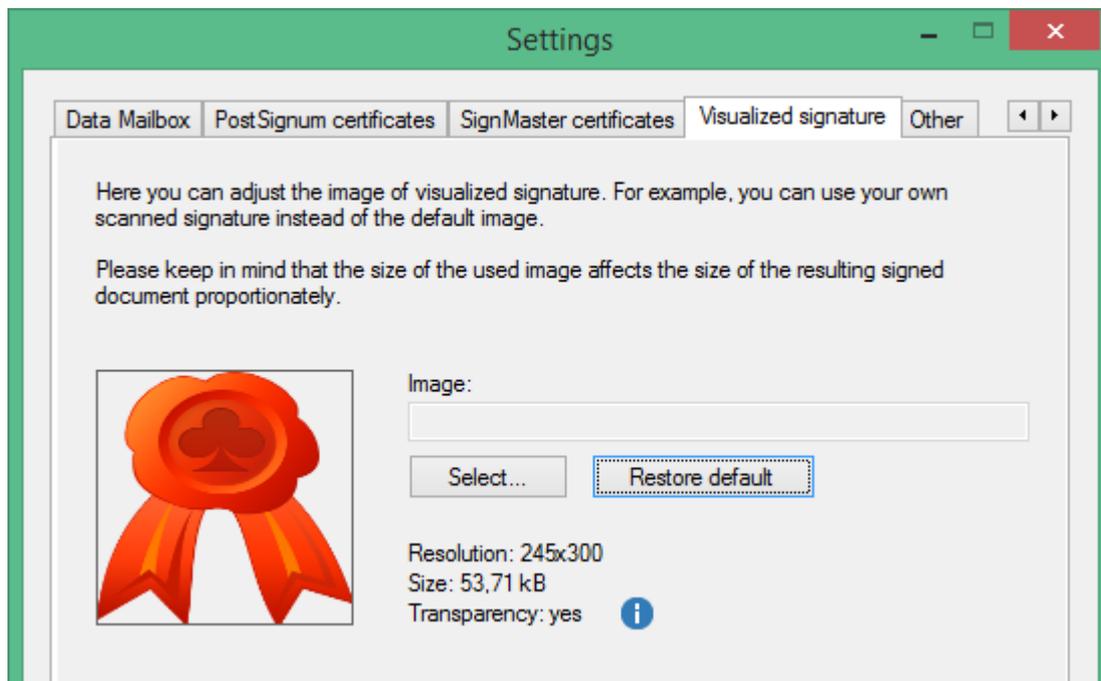
The standard graphical signature image, which you can see above, can be replaced by a symbol of your own choosing. The image must be set up before signing.

Display the **Document** toolbar, select **Settings** and then open the **Visualized signature** tab.



Click **Select** to open the standard file selection dialog. Navigate to the file containing your preferred image for signature visualization. The image is displayed in the preview window on the left side of the dialog. Click **OK** to confirm. This image will be inserted in all documents where you select to attach a visualized signature.

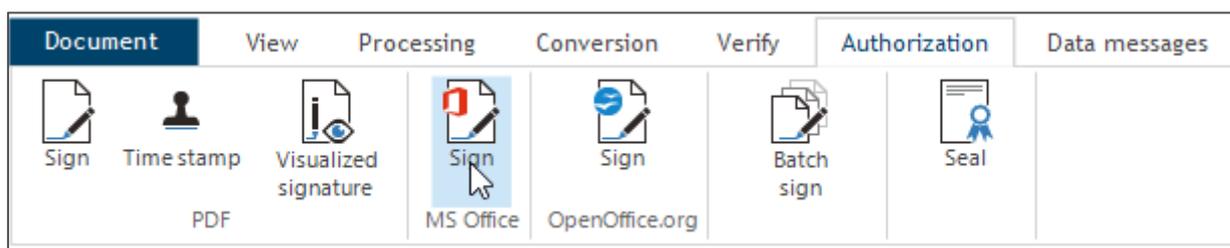
The dialog also contains the **Restore default** button – click it to restore the original signature symbol (red seal).



6.6. Signing office documents

Attaching a signature and a time stamp might be required not only for PDF documents, but also documents of other types. Therefore Software602 Signer cooperates with the most commonly used "office suites" – Microsoft Office and Open Office – and provides digital signatures for their documents.

The **Authorization** tab of the toolbar offers two buttons: **Sign MS Office** and **Sign OpenOffice.org**.



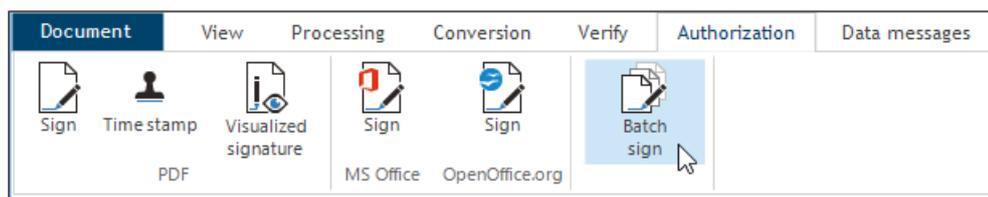
Click one of the buttons to display the **Open** dialog set for filtering either **Microsoft Office documents** or **OpenOffice.org documents**.

Select the file to load. A certificate selection dialog is then displayed with the options to attach a time stamp and the reason for signing. In these cases, the document is not displayed in the application's work area.

When the document is successfully signed, a save dialog is automatically displayed. After saving the document, the application is ready for processing other documents.

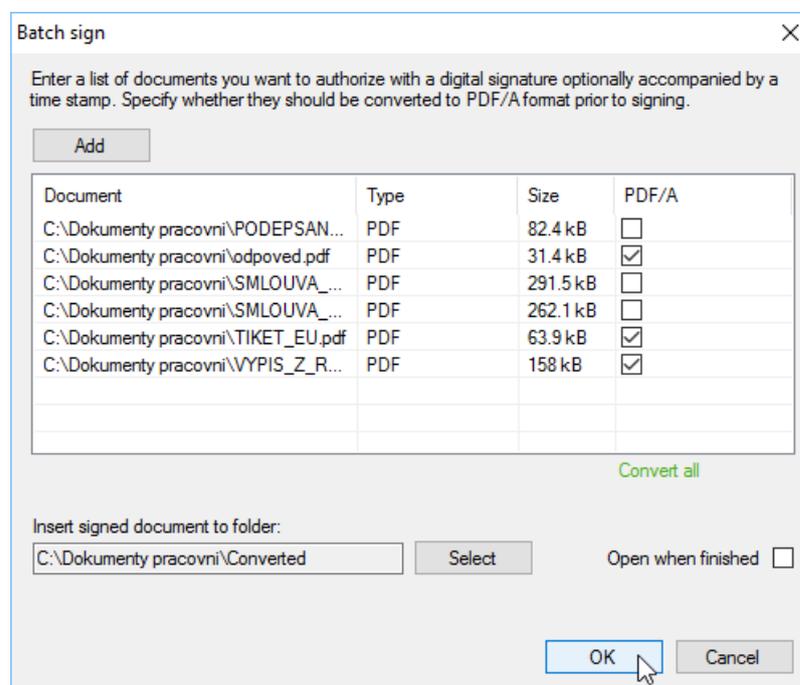
6.7. Bulk signing of documents

To sign more PDF and Office documents at the same time, go to the **Authorization** tab and select **Batch sign**.



Click the **Batch sign** button to open a window with the same name.

Click **Add** to open the usual system dialog for file selection. Use it to select one or more files to be digitally signed. The selected files will be displayed in a list in the middle part of the window.



Check the boxes in the **PDF/A** column to convert the selected file into archival PDF/A before signing. If you want to convert all selected documents into PDF/A, click the green text **Convert all**.

The signed documents will be placed in the folder specified in the field **Insert signed documents to folder**. To change the folder, click **Select** to open the dialog for selecting disks and folders and use it to select the required folder.

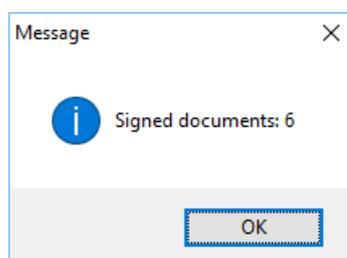
If you want to open this folder after completing the signing, check the box **Open when finished**.

When all the settings are ready, click **OK**; then select the electronic signature, enter the reason for signing and optionally attach a time stamp in the following dialog.

After clicking **OK**, a dialog for selecting the signature certificate is displayed.

Document	Type	Size	PDF/A
C:\Dokumenty pracovni\PODEPSAN...	PDF	82.4 kB	<input type="checkbox"/>
C:\Dokumenty pracovni\odpoved.pdf	PDF	31.4 kB	<input checked="" type="checkbox"/>
C:\Dokumenty pracovni\SMLOUVA_...	PDF	291.5 kB	<input type="checkbox"/>
C:\Dokumenty pracovni\SMLOUVA_...	PDF	262.1 kB	<input type="checkbox"/>
C:\Dokumenty pracovni\TIKET_EU.pdf	PDF	63.9 kB	<input checked="" type="checkbox"/>
C:\Dokumenty pracovni\VYPIS_Z_R...	PDF	158 kB	<input checked="" type="checkbox"/>

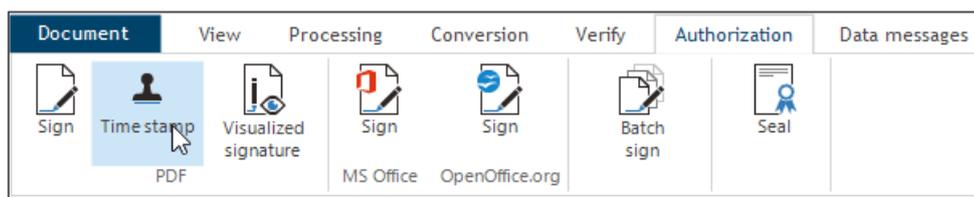
After you select and confirm the certificate, the application signs the files. If a document is successfully signed, its entry is highlighted in green. If the signing fails, the entry is highlighted in red. At the end of the process, a message with the process result is displayed.



6.8. Attaching a standalone time stamp

PDF documents that you select or load in the application can be provided with a standalone time stamp.

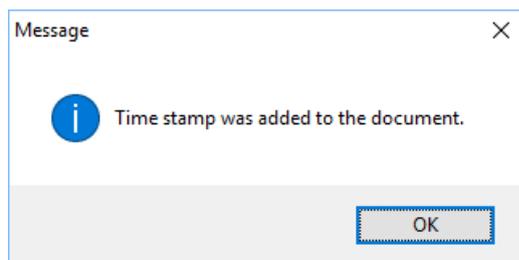
To add it, open the **Authorization** tab of the toolbar and its **PDF** section contains the corresponding **Time stamp** button.



Click the button to display the **Open** dialog with file selection mask set to PDF.

Select the document. It is then loaded into the application and a time stamp attached to it. The document stays displayed in the application's work area and you can continue processing it.

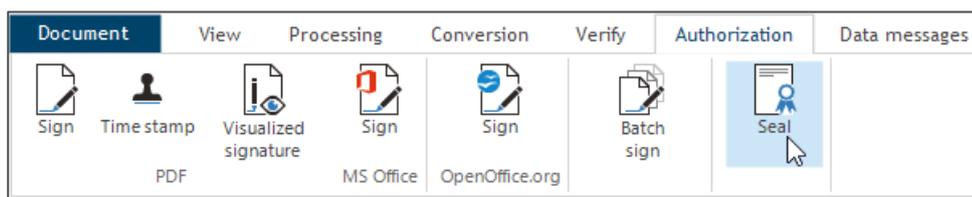
The **Time stamp** button can be also used to attach a time stamp to a document that has been already loaded in the application (opened for other processing).



You can use the **Sign** button in the same manner – click it to attach a digital signature to an already opened document.

6.9. Sealing

The sealing operation means attaching a signature and a time stamp from an external source to the document. The sealing service secures an electronic document using an advanced electronic seal with an electronic time stamp in accordance with ETSI specifications. The selected document file is submitted to the *SecuSign* server, where it is provided with an electronic signature (e.g. a company one) and a time stamp. The “sealed” document is then returned to the Signer application that submitted it.



To seal a document, go to the **Authorization** tab and click **Seal**. A dialog with the same title is opened.

Enter the PIN into the field **Private key PIN** – this is the password that secures the access to the signature certificate uploaded to Azure KeyVault in the administration of your 602 ID account.



Click **OK** submit the file for “sealing”. The sealed file will be returned to the application and you can save it.

6.10. Document validation and conversion to the archival format

Software602 Signer can help you verify whether a given document is digitally signed and/or in a state fully compliant with the archival format, PDF/A.

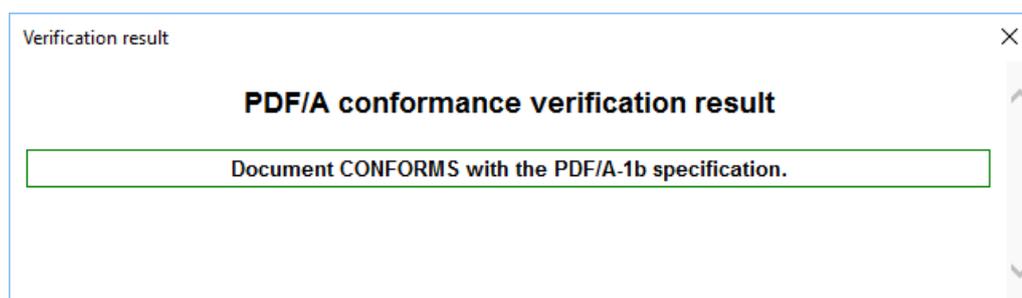
On the **Verify** tab of the toolbar, the **Verify** section contains the following buttons for this purpose: **Compliance with PDF/A** and **Digital signatures**.



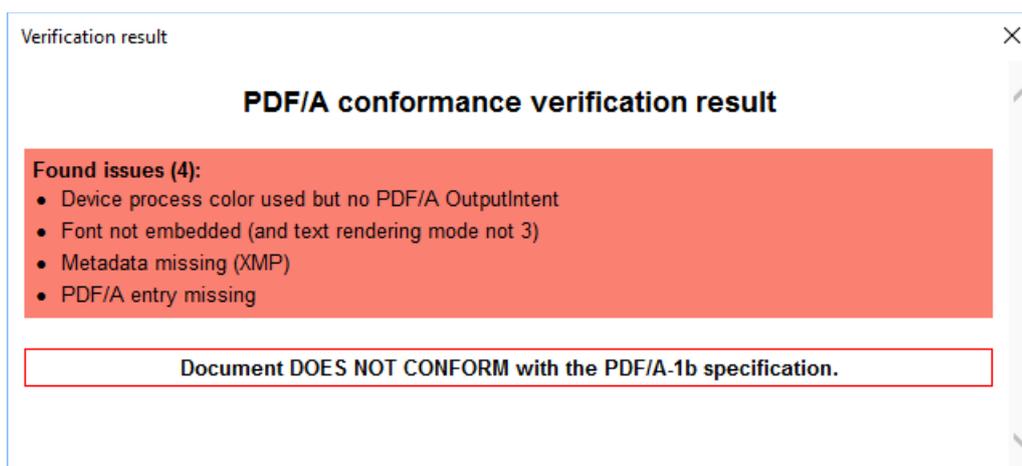
6.10.1. Verifying compliance with the PDF/A archival format

To verify whether a PDF document complies with the archival format, PDF/A, click **Compliance with PDF/A**. You can use the button for the currently opened document or – if there is no current document – for a document that you select in the **Open** dialog.

After clicking the button, the document is tested – depending on its size, it might take some time. If the document complies with the archival format, the following message is displayed:



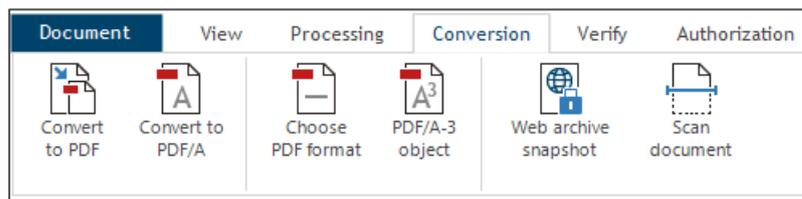
Otherwise the message informs you that the document fails to comply with the PDF/A specification and the reasons for its failure are listed.



6.10.2. Document conversion to various PDF formats

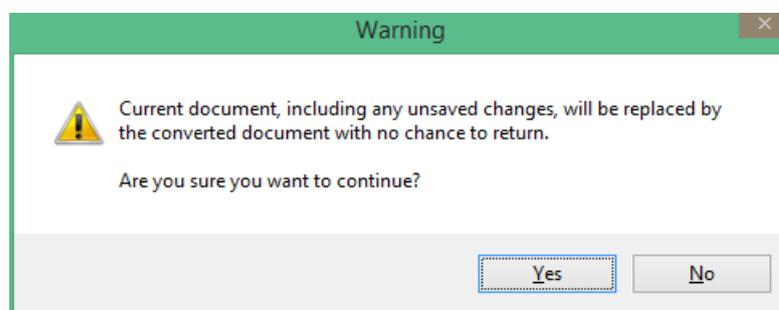
If you have tested your document for compliance with PDF/A and it failed, you can easily convert it so that the document complies with the specification for archiving.

The **Conversion** tab of the toolbar contains buttons for creating PDF documents by conversion to virtually any specification.

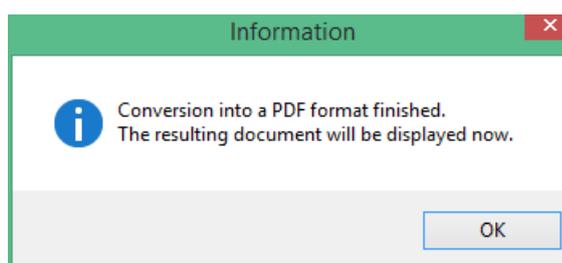


To convert any convertible document (including images) to general PDF format, click **Convert to PDF**. Conversion will be applied to a document loaded in the application or any document from a file selected in the **Open** dialog.

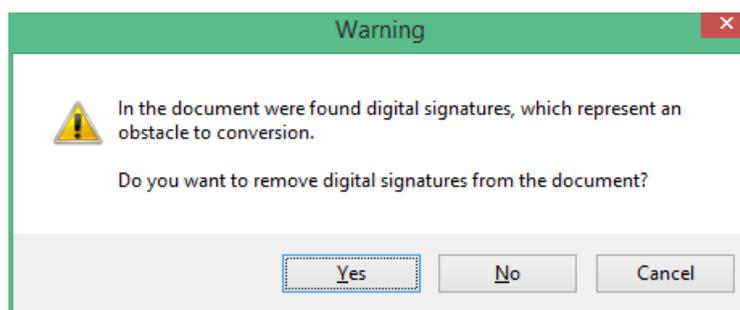
A warning will be displayed before the conversion, informing you that the original version of the document will be lost and replaced by the converted document.



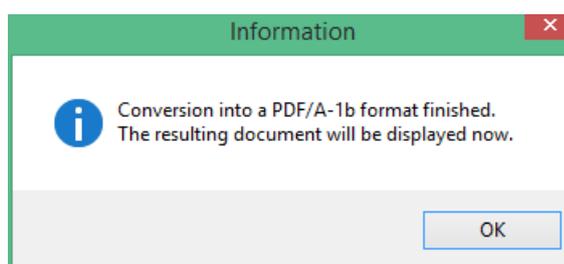
A message will notify you about the end of the conversion and the converted document will be displayed in the application window.



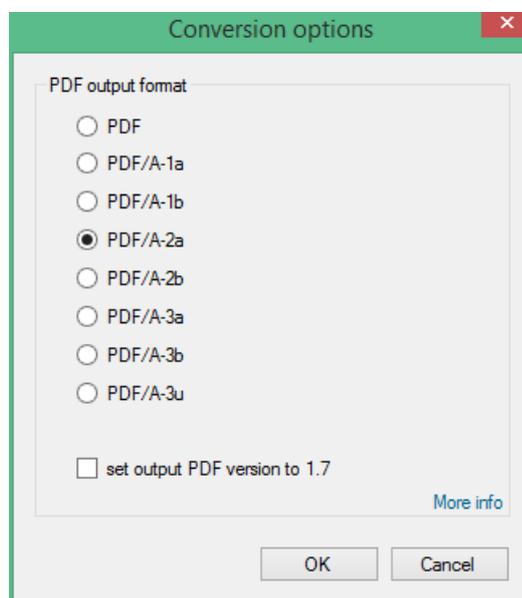
If the loaded document is already provided with an electronic signature or more signatures, they will be removed from the document before the conversion. You will be informed about it by a dialog requiring confirmation of the removal.



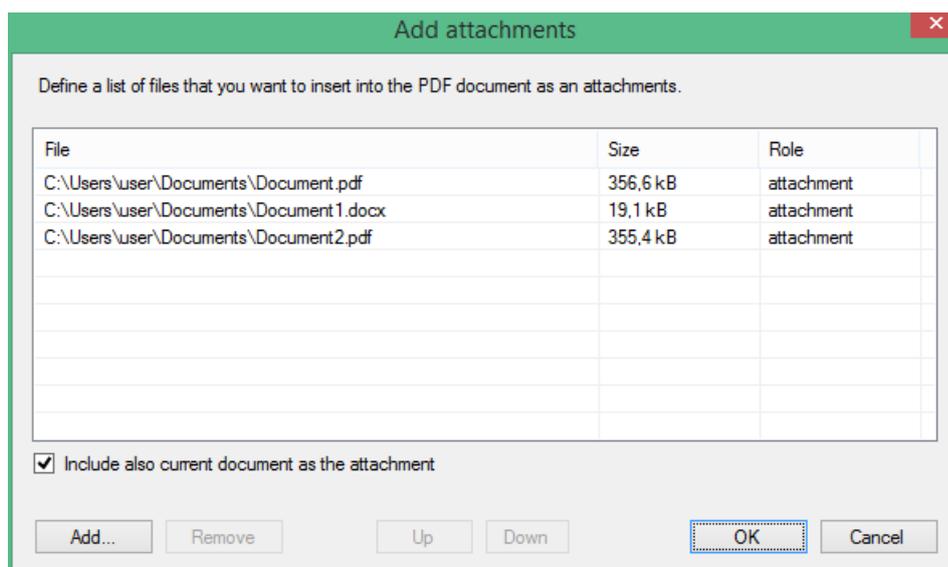
To convert documents in the archival format, PDF/A, click **Convert to PDF/A**.



Or you can click **Choose PDF format** to select from all the archival formats available for conversion. Select the desired format by clicking on one of the items listed in the **Conversion options** dialog.



To convert to PDF/A-3, click **PDF/A-3 object** to open the **Add attachments** dialog.



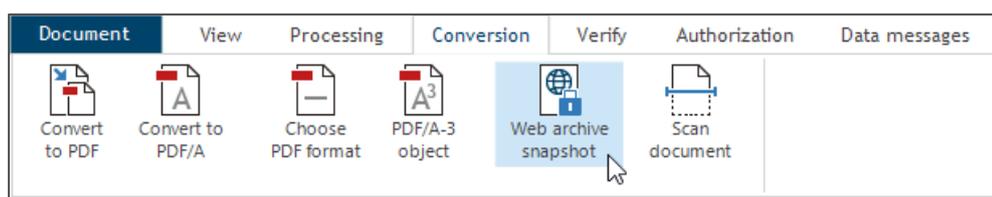
Use the dialog to create a list of files that will be added to the resulting document as attachments. **The PDF/A-3 specification** issued in 2012 allows inserting any files (e.g. XML, CSV, CAD, Word documents, spreadsheets and other) into the basic PDF/A format and archiving them as a compact object.

Create the list of files to add into the resulting document by clicking **Add**; the button displays the **Open** dialog to look up and add the desired file(s). You can use the button repeatedly.

6.11. Web page archiving

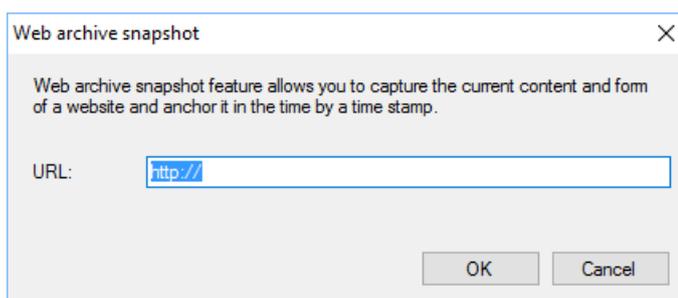
The contents of a website can be saved in an archival format as well as it can be done for PDF documents saved in files.

The **Conversion** tab contains the button **Web archive snapshot** for this purpose.



Click the button to open the dialog **Web archive snapshot** and enter the address of the page you want to archive. You can copy the address from the address bar of a browser where you have opened it. By attaching a time stamp, such a web page snapshot will acquire validity regardless of time.

This archiving process uses the newest specification of PDF/A-3, issued in 2012. The specification allows insertion any formats (such as XML, CSV, CAD, Word documents, spreadsheets and others) into the PDF/A and archives them as a whole, which is convenient for web page archiving.



The conversion might take some time, depending on the size of the page being archived.

When the process finishes, a preview of the web page is displayed in the application along with details on the date and time of downloading the page, the address and port and the page's security. The content itself can be viewed below the information, if you scroll down the image in the application.

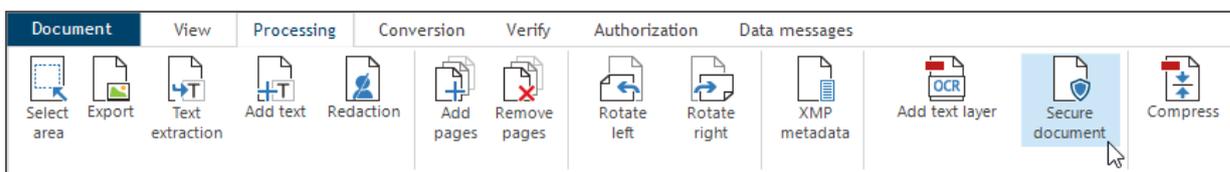
A panel on the left of the preview, titled **Attachments**, contains links to files that were part of the web page.

The converted web page must be then saved to a file. The saved page will keep the same appearance as the preview that had been displayed in the Software602 Signer window.

6.12. Securing PDF documents against manipulation

Besides securing the document's authenticity using digital signatures and time stamps, PDF documents can also be protected by a password against unauthorized manipulation – modifications, printing and extracting text by copying parts of the document. Access to the whole document (opening) can be protected by a separate password.

To protect the document, display the **Processing** tab of the toolbar and click **Secure document**.



In the **Secure document** dialog, check **Add security** before you can add any security measures to the document.

Select the encryption algorithm from the **Encryption** list:

- AES (128 bits)
- RC4 (40 bits)
- RC4 (128 bits).

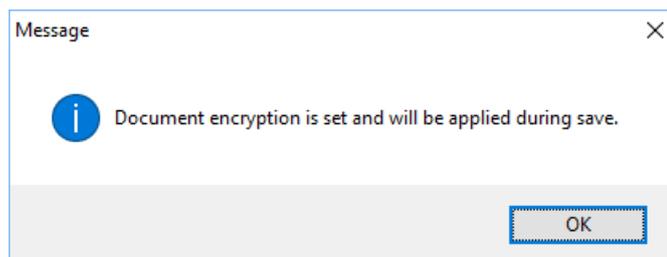
Document access – the ability to open the document – can require a password. Set it up by entering the password in the two fields in **Password required to open the document (user)** section. The second field is, as usual, a confirmation of the first one. Without knowing this password, no one will be able to open the document.

Knowledge of the second password, entered in the section **Password required to change permissions and passwords (master)**, will be required to perform actions checked in the list below, in section **Document permissions**. The password knowledge will be of course required from you, the document's owner, as well, if you want to process it e.g. in Adobe Acrobat. The following actions can be set to require a password:

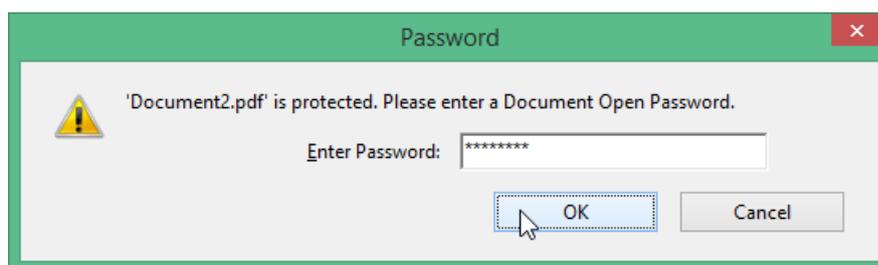
- Check **Allow changing the document** to password protect the option to modify the document contents.
- Check **Allow content copying or extraction** to password protect the document against copying using the Windows clipboard.
- Check **Allow printing the document** to password protect the document against printing the document on any device.

To remove the password protection, delete the contents of the password fields and save the document.

Confirm the **Secure document** dialog by clicking **OK**. A message will inform you that the new security settings will take effect after saving the document.



Save the document. From that moment, the required actions will not be possible to perform without entering the password.

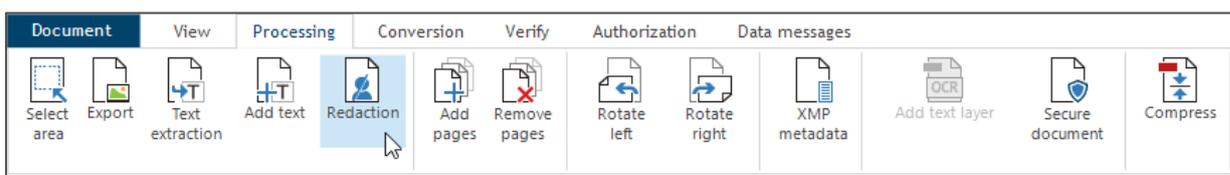


6.13. Document anonymization

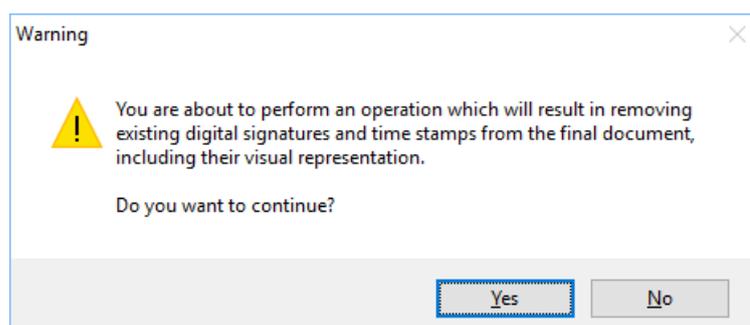
The redaction (anonymization) process allows you to remove signatures and time stamps from a PDF document and also to redact confidential information, such as personal data of people, business partners, etc.

The removal is performed in the graphical (visible) layer of the PDF document, as well as, even more importantly, in the document's textual layer.

To redact a PDF document, go to the **Processing** toolbar and click the **Redaction** button.



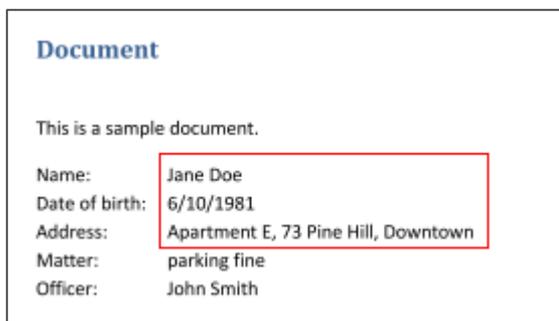
If the document is provided with any digital signature(s) or time stamps, a message is displayed, warning you that they will be removed (including any visualization) if you continue the process.



6.13.1. Deleting parts of the document

The document is then displayed in the window, allowing you to delete selected parts by covering them with a black area. How to proceed:

1. By dragging the mouse cursor, select the area to be blacked out.

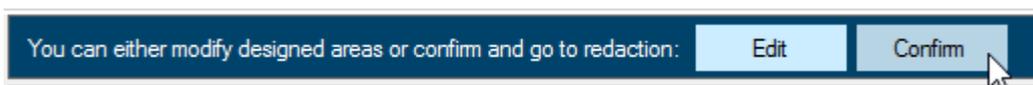


Document

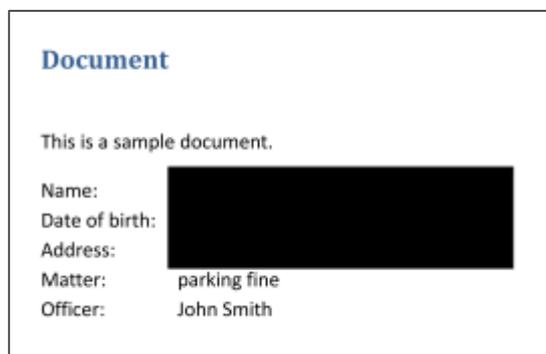
This is a sample document.

Name: Jane Doe
Date of birth: 6/10/1981
Address: Apartment E, 73 Pine Hill, Downtown
Matter: parking fine
Officer: John Smith

2. Click the **Confirm** button placed above the work area.



3. The selected area will be blacked out.



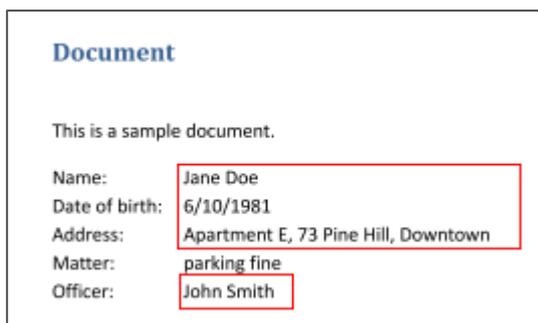
Document

This is a sample document.

Name: [Redacted]
Date of birth: [Redacted]
Address: [Redacted]
Matter: parking fine
Officer: John Smith

Save the changed document – go to the **Document** menu and select **Save** or **Save as**.

If you want to black out several areas at once, select them in sequence before continuing – the selection tool stays active until you click one of the buttons.



After clicking **Confirm**, all the selected areas are blacked out at once.

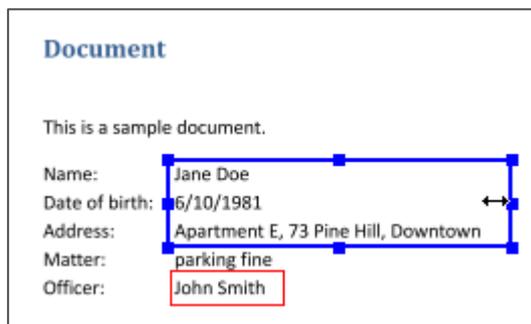
Note – you can press the **Esc** key to cancel area selection without blacking out the selected areas.

6.13.2. Editing the selected area

If you realize, after selecting (marking) the area to be blacked out, that the area is selected inaccurately, you can click **Edit** instead of **Confirm**.



The thin red border of the selected area will change to thicker blue with the nodes displayed.

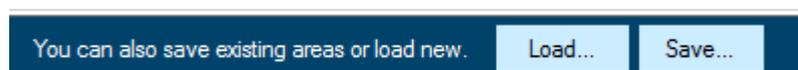


- Drag the nodes using the mouse to enlarge or reduce the area in the corresponding direction.
- Or drag the rectangle area to move the whole area selection.

Click **Confirm** to set the area's shape and size and black out the whole selected area.

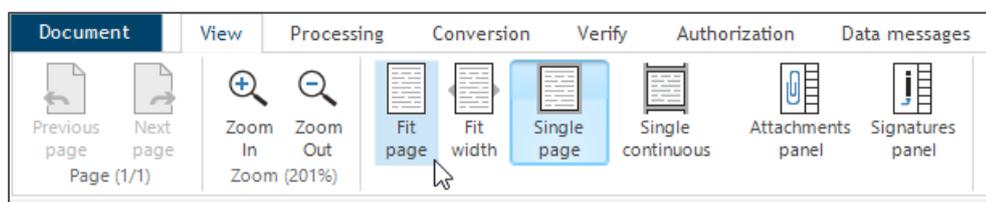
6.13.3. Saving and loading areas

It is possible to save the selected areas in files as redaction masks and later load them from the files and place in documents. For this purpose the blue toolbar contains buttons **Load** and **Save**.



6.14. Ways of displaying the document's pages

The **View** tab of the toolbar contains buttons you can use to modify the view of the PDF document that is currently loaded in the application.



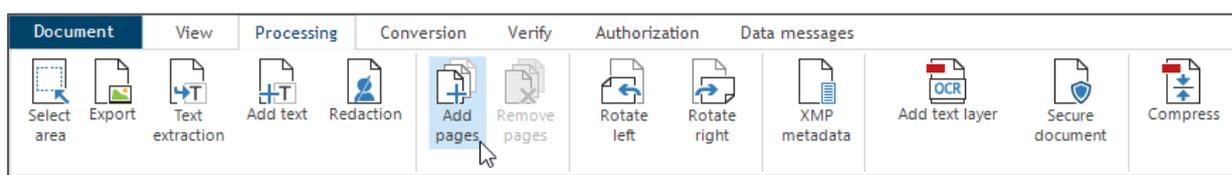
- **Previous page** and **Next page** provide page-by-page scrolling of the document forwards and backwards. Position in the document (page number out of the total) is shown by an indicator between the buttons. You can enter a number in the page number field and press **Enter** to go to the page directly without having to click buttons repeatedly.
- **Zoom In** and **Zoom Out** serve as a magnifying glass, allowing you to change the scale in which the document's page is displayed. The current zoom level is displayed below the pair of buttons.
- **Fit page** – click the button to adjust the zoom level so that one whole page of the document is visible.
- **Fit width** – click the button to adjust the zoom level, so that the page covers the whole width of the window's work area. Only a part of the page's height will be probably visible.
- **Single page** – click the button to display one page at a time (default).
- **Single continuous** – click the button to display the pages as a continuous strip, one after another (you can use the vertical scrollbar to scroll the document).
- **Attachments panel** – click the button to display / hide a panel with a list of files attached to the document on the left side of the window.
- **Signatures panel** – click the button to display a window with a list of attached signatures and time stamps.

6.15. Adding and removing pages from the document

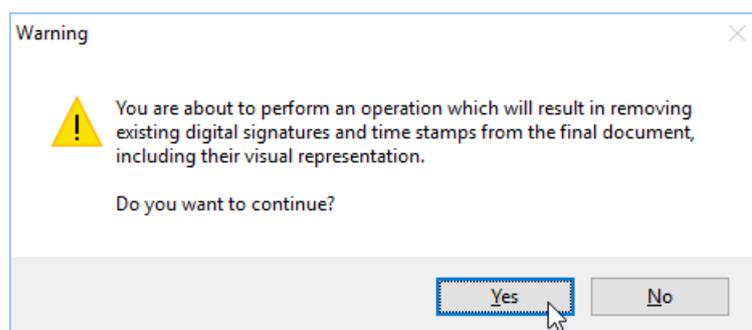
You can add pages to the currently displayed document by extracting them from a selected PDF document. Pages can be also removed.

6.15.1. Adding pages

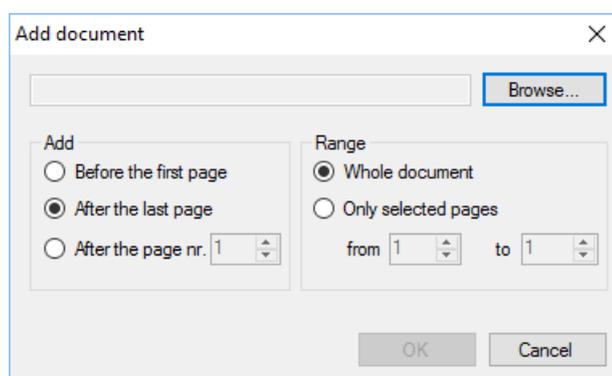
To add pages, go to the **Processing** tab of the toolbar and click **Add pages**.



Before adding or removing pages, all existing electronic signatures will be removed from the document. Click **Yes** in the dialog containing this warning to confirm that you want to proceed.



The button displays the **Add document** dialog, where you can select what to add to the document, where and the range of added pages.

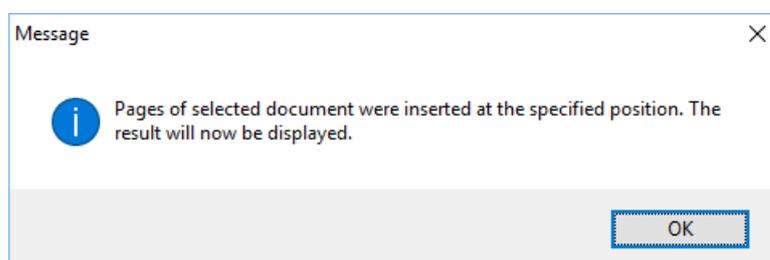


Click **Browse** to select the file with pages you want to add. Use the standard **Open** dialog to select the drive, folder and requested file.

Select from the **Add** options where to place the new pages. You can opt to place the pages at the beginning of the document (before the current first page), at the end (after the last page) or after a specific page of the current document (for example after page 5).

Use the **Range** switch to request adding the whole selected document at the given place. Or select a range of pages – just a single page or e.g. pages 3 to 6 – to be added.

The following message will notify you about the modification of the displayed document:

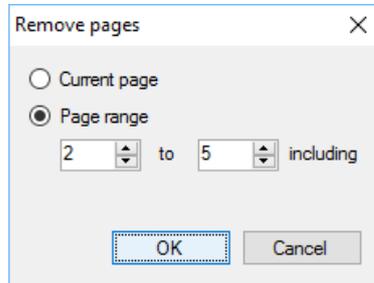


After clicking **OK**, you can add more pages from another document or save the document and close it. By repeating this process you can add several groups of pages to various places in the document.

6.15.2. Removing pages

Just like adding pages, you can remove pages from the document. Open the corresponding dialog by clicking **Remove pages**.

Set the switch either to remove the current page (a single page – the one that is currently displayed) or to remove several pages in a given range (for example second to fifth).



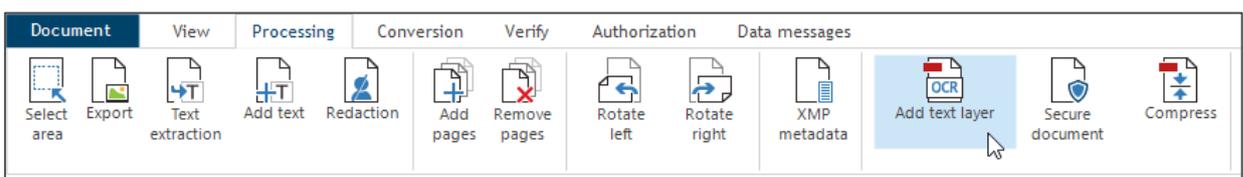
By repeating the process, you can remove several ranges of pages, just keep in mind to respect the numbering changes after each step.

6.16. Creating a textual field over a PDF document

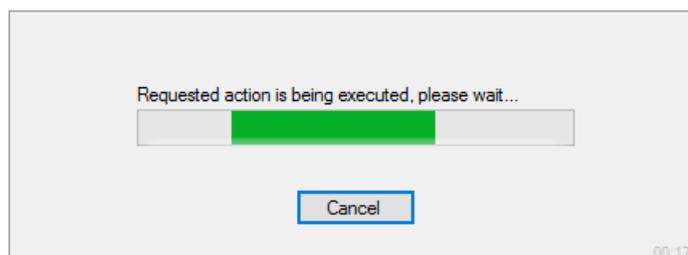
This feature provides extraction of plain text from purely graphical PDF documents and adds the text as a new layer – over the image.

To illustrate: using a scanning device (see the features of the **Scan document** button of the **Conversion** toolbar tab), you scan the graphical appearance of a document that contains some text. Then convert it to PDF and subsequently use OCR technology to identify text in the image and convert the text into characters. The text layer will be placed in a single PDF document along with the image, where it will be possible to e.g. select the text and copy it in the Windows clipboard.

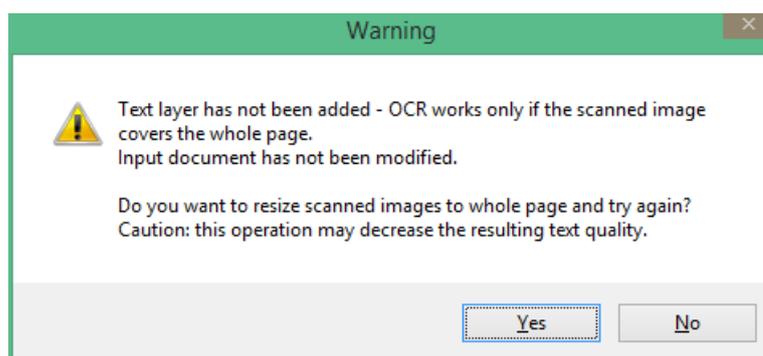
The **Processing** tab of the toolbar contains buttons for a range of document editing functions.



One of them is **Add text layer**. Click it to process the current document and place the recognized text as the top, or “textual”, layer.



If the scanned image does not cover the whole area of the document, the textual layer cannot be added.

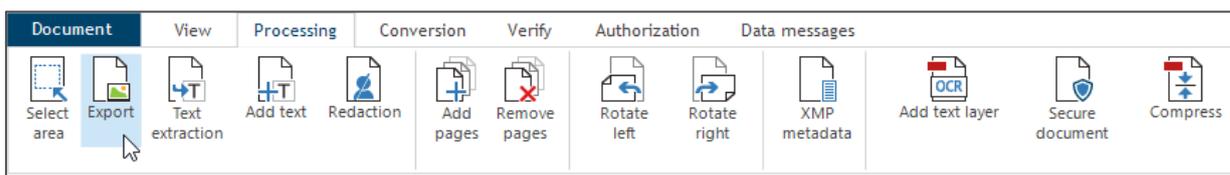


6.17. Export a document or its area as an image

Use this feature to export the currently displayed page or its part (an area) in an image file in a selected format.

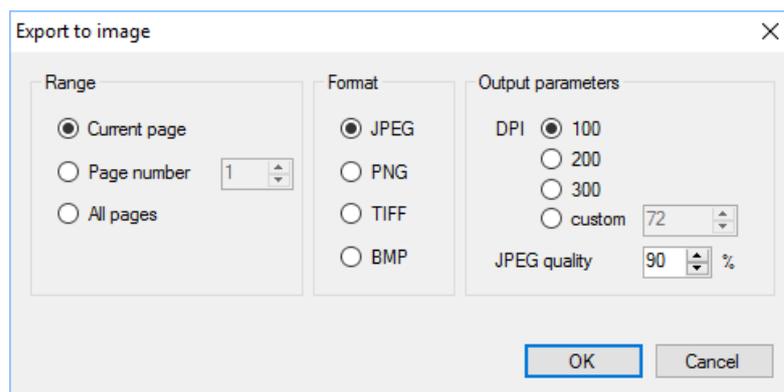
6.17.1. Export a whole page as an image

To export the whole page as an image, go to the **Processing** tab of the toolbar and click **Export**.



In the **Export to image** dialog, set up the export method.

- Use the **Range** control to set what to export – the current page, a selected page or all pages in the document.
- The **Format** switch allows you to select whether to export to JPEG, PNG, TIFF or BMP image file.
- Use the **Output parameters** section to set the DPI (*Dots Per Inch*) resolution of the resulting image.
- If exporting to JPEG, you can use the **JPEG quality** dial to set the compression level of the resulting image (in percentage – the lower the level, the smaller the file, but at the cost of some quality loss).



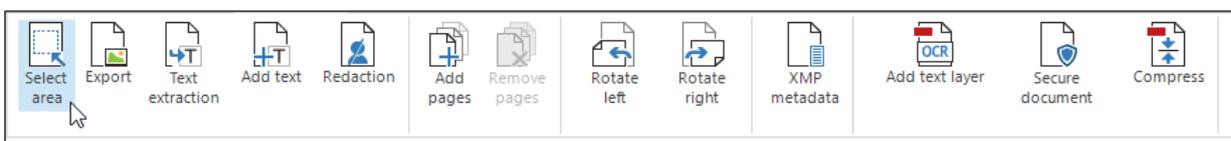
When you have finished setting up the export parameters, click **OK** and select the file in which to save the image.

If you want to see the image export result immediately, check **Display exported image**. The image will be displayed in the default viewer set for this image type.

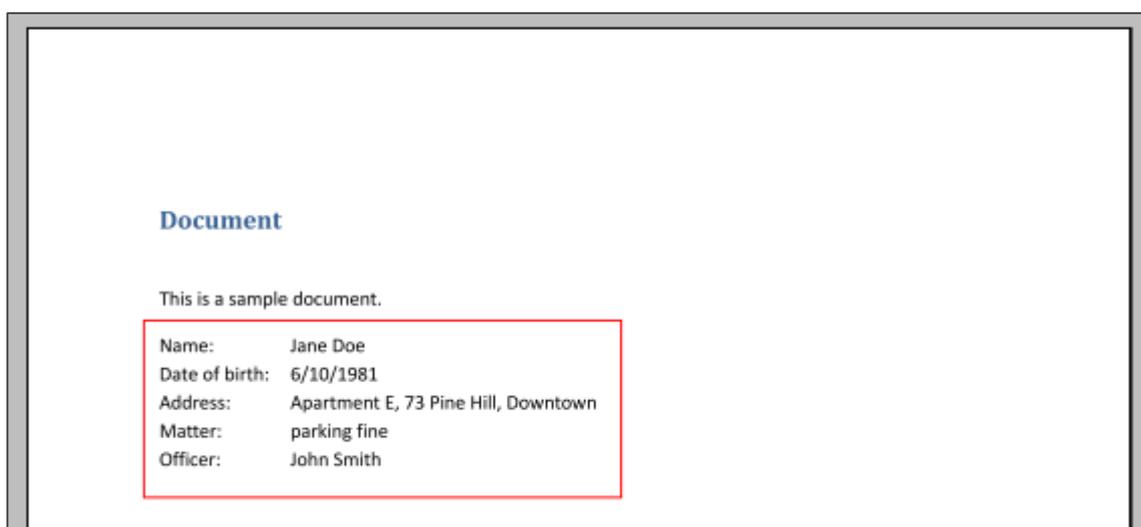
6.17.2. Export of a part of a page

This feature allows you to export a selected part of a page as an image.

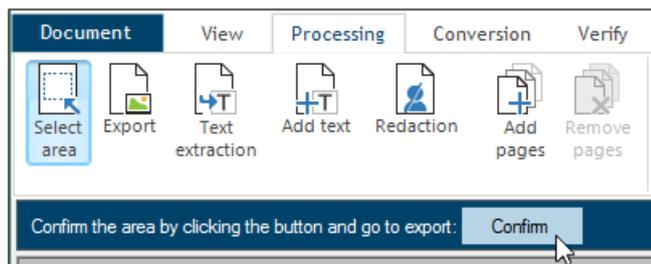
To export a selected area, go to the **Processing** tab of the toolbar and click **Select area**.



By dragging the mouse while holding down the left button, select the area to export. The area will be highlighted by a red rectangle.



Click the **Confirm** button placed below the toolbar to confirm the area selection and start exporting. The rest of the process is identical with export of the whole page.

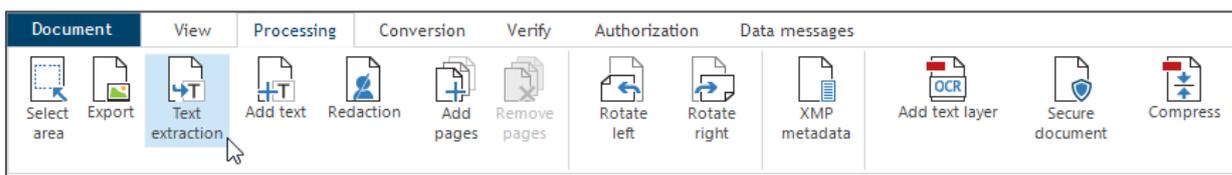


To cancel the area selection and start selecting again, click on the X button on the right of the blue strip.

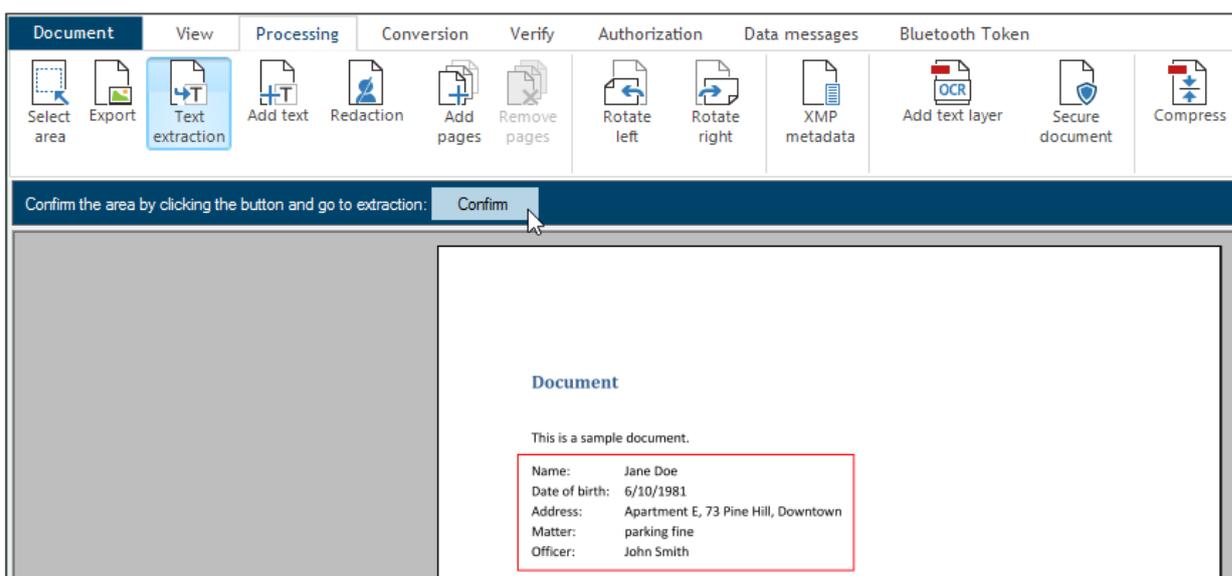
6.18. Text extraction from an area in the document

This new option allows you to extract text from an opened PDF document to the computer's clipboard (just as if you selected a part of text and pressed the **Ctrl+C** shortcut for copying).

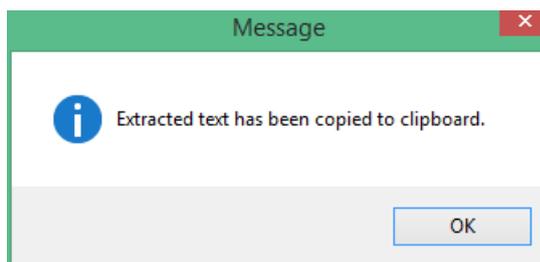
Go to the **Processing** toolbar and click **Text extraction**.



Then use the mouse to select an area in the document, from which to extract the text, and confirm the selection by clicking **Confirm**.



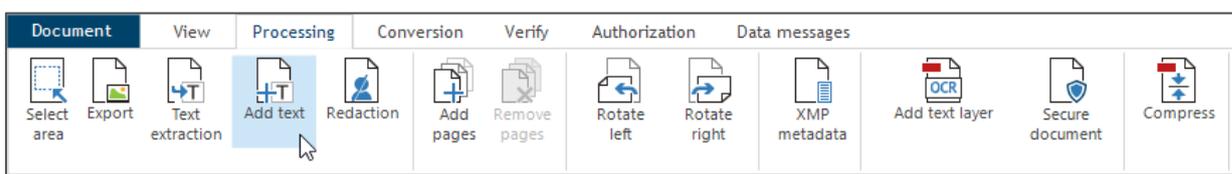
If the text extraction is successful, a dialog window will inform you about the result.



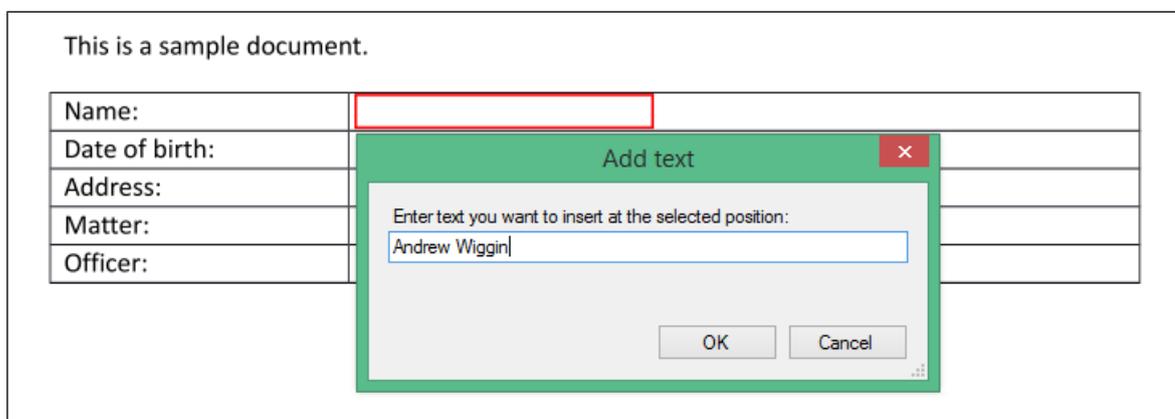
The extracted text is placed in the clipboard so that you can paste it anywhere you need.

6.19. Inserting text in the document

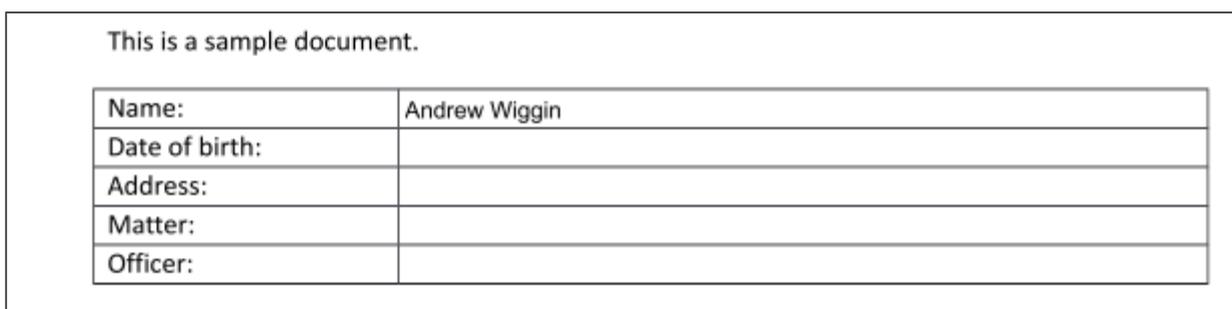
To add any text to the document, use the **Add text** button from the **Processing** tab.



After clicking the **Add text** button, select the area in the document where you want to place the text. When you select the area, a dialog window for entering the text is automatically displayed.

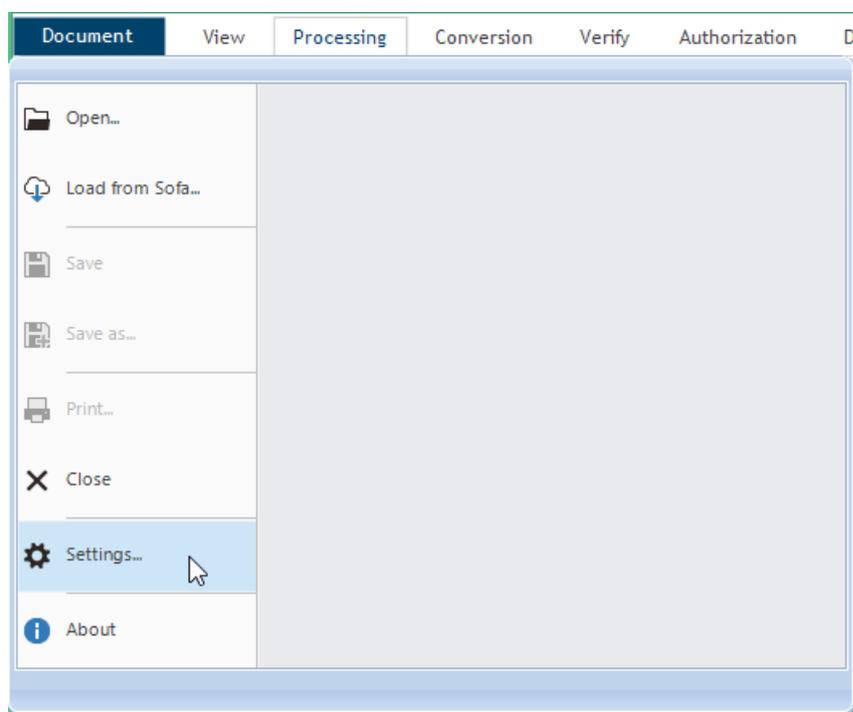


Click **OK** to insert the text in the selected area of the document.



7. Signer settings overview

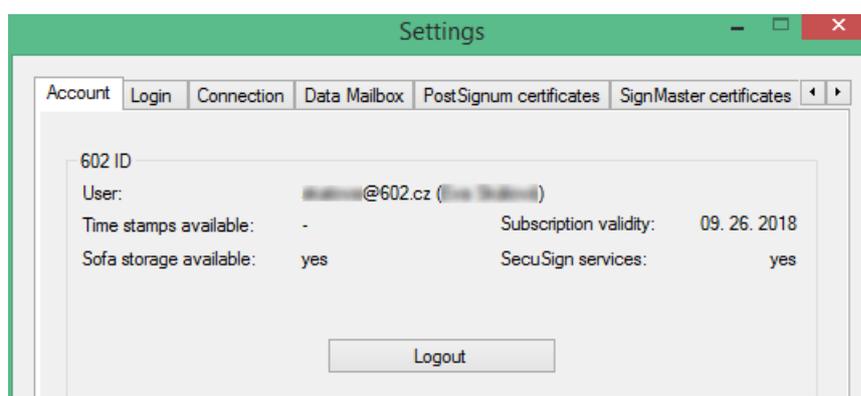
Set the Software602 Signer parameters using the **Settings** command, available from the **Document** tab of the toolbar.



The **Settings** command displays a window with the application's setting options.

7.1. Account Information

Information displayed by the **Account** option varies, depending on whether you log in using your 602 ID account or using your organization's corporate account.



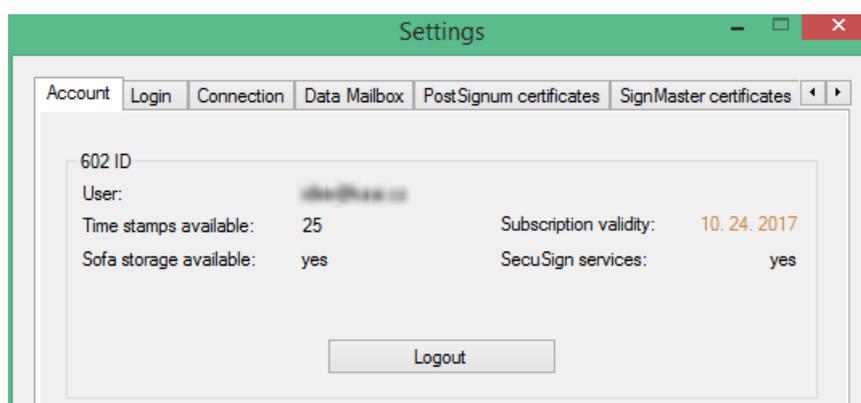
Based on the account type, the corresponding half of the dialog is active, including the **Logout** button. Click the button to log out of the account.

7.2. License validity

A new user who signs up to *Signer* will receive a TRIAL version valid for 14 days with 25 time stamps. If the stamps are used up or the TRIAL version validity expires, a window is displayed, informing about the necessity to subscribe to a paid full version. It is possible to continue using the application without a license; in such a case only the data mailboxes will be functional in the whole environment.

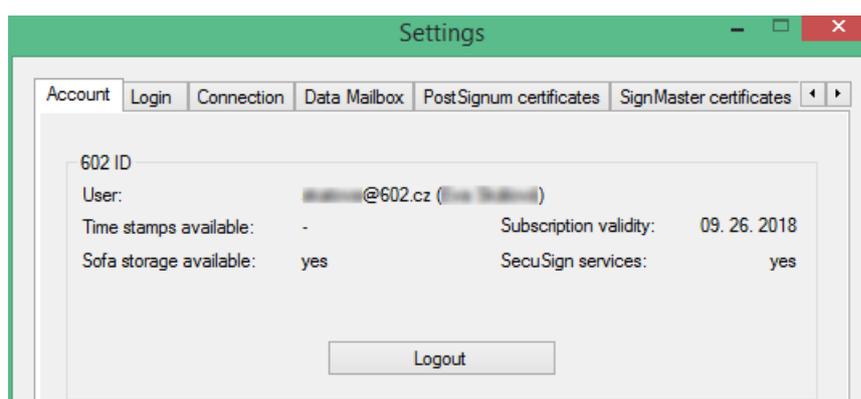
See the **Account** tab of the **Settings** dialog, where the **Subscription validity** field contains information on the expiry of your license.

Numbers of time stamps in the field **Time stamps available** are only displayed in the TRIAL account or to the users of previous *Signer* versions.



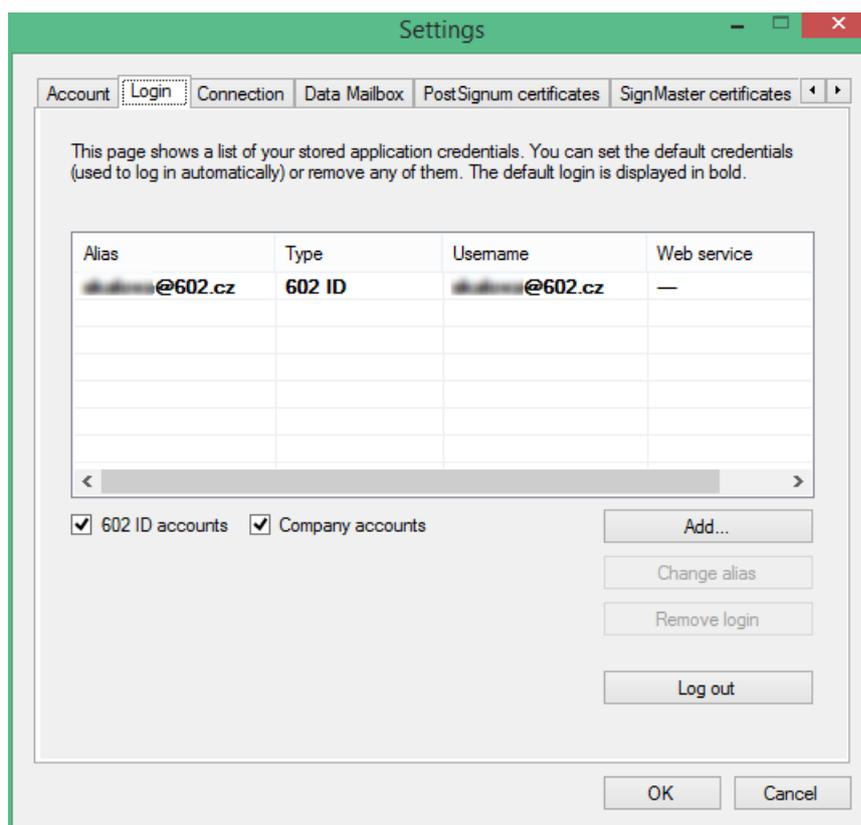
Users with a new license see “-” as the number of stamps, because they have essentially unlimited number of stamps.

User of the previous versions can continue working for another year from the installation of version 3.5. Then they need to subscribe to another license.

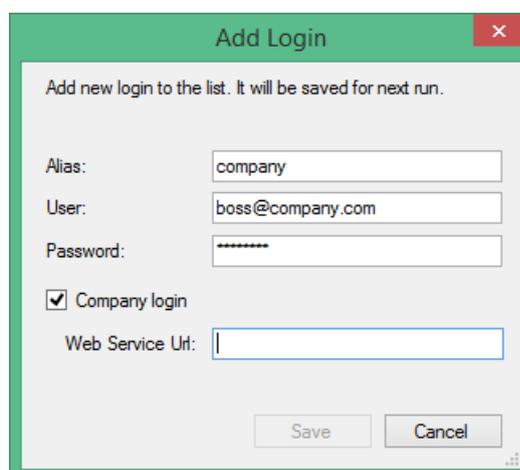


7.3. Login

The **Login** tab contains a list of all your accounts used for signing in to *Signer*. By checking or unchecking the two fields below the list, you can choose to display only 602 ID accounts or your company accounts.



To create a new account, click **Add**. Enter your login details into fields **Alias**, **User** and **Password**. If this is a company account, check the **Company login** field and enter the URL where this service is run in the **Web Service URL** field.

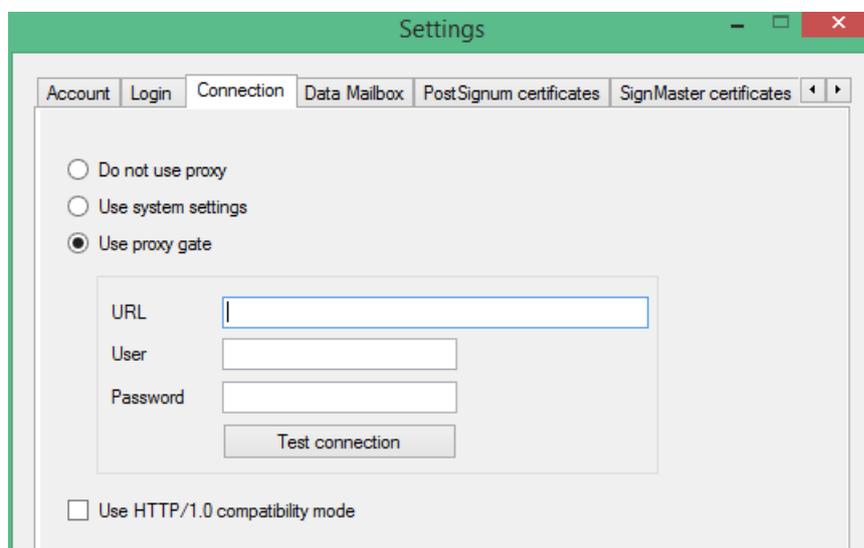


You can also edit account information. Click the **Change alias** button to give a name to your login details – instead of your user name, you can use any description, which will then be used when selecting your account.

Click **Remove login** to delete the details of the selected account from the list. Click **Log out** to log out from the selected account (so that you can sign in to another one).

7.4. Proxy connection

The **Connection** window allows you to set up a proxy gateway. This gateway watches over the data transfers between your application and the “outside world”. It makes sure that no unwanted transfers are allowed from the outside to you, but also nothing leaves your premises without permission. Your network administrator sets up these gateway rules.



There are three options of applying security to the proxy gateway – select one of them using the switch in the upper part of the dialog.

- It is not recommended to use the **Do not use proxy** option, which allows data flow without any protection.
- Security without having to set up anything is provided by the second option, **Use system settings** – the gateway will function with the same settings as your computer's environment.
- The third option is to **Use proxy gate**. If you select it, you assign the communication security to a specific proxy gateway defined by its IP address (the **URL** field) and access details (the **User** and **Password** fields), which you can learn from your network administrator.

Check **Use HTTP/1.0 compatibility mode** if your proxy gate only supports the HTTP/1.0 mode. When this field is checked, the use of *Expect* header is disabled, because it could cause error 417 or even a crash of the whole application.

You can click **Test connection** to test whether your settings will create a usable and functional connection. If everything is in order, confirm the settings by clicking **OK**.

7.5. Requesting and renewing PostSignum certificates

Digital signature certificates are the centerpiece of security for (not only) PDF files. Certificates issued by PostSignum certification authority are used; there are usually two types of them, a qualified certificate (QCA) and a commercial (public) certificate (VCA). Qualified certificates might be personal or system ones. Public certificates are issued as personal.

Issue of these digital certificates is subject to a fee set by the Czech Post's price list. For the first issue of a certificate, you must submit a request and then prove your identity at a Czech POINT counter of any Czech Post branch.

Software602 Signer can make this easier for you by creating and submitting the request and collecting the certificate digitally.

To handle digital certificates, select the **PostSignum certificates** command. The window contains four tabs for various certificate operations – click on the individual tabs to display their contents.

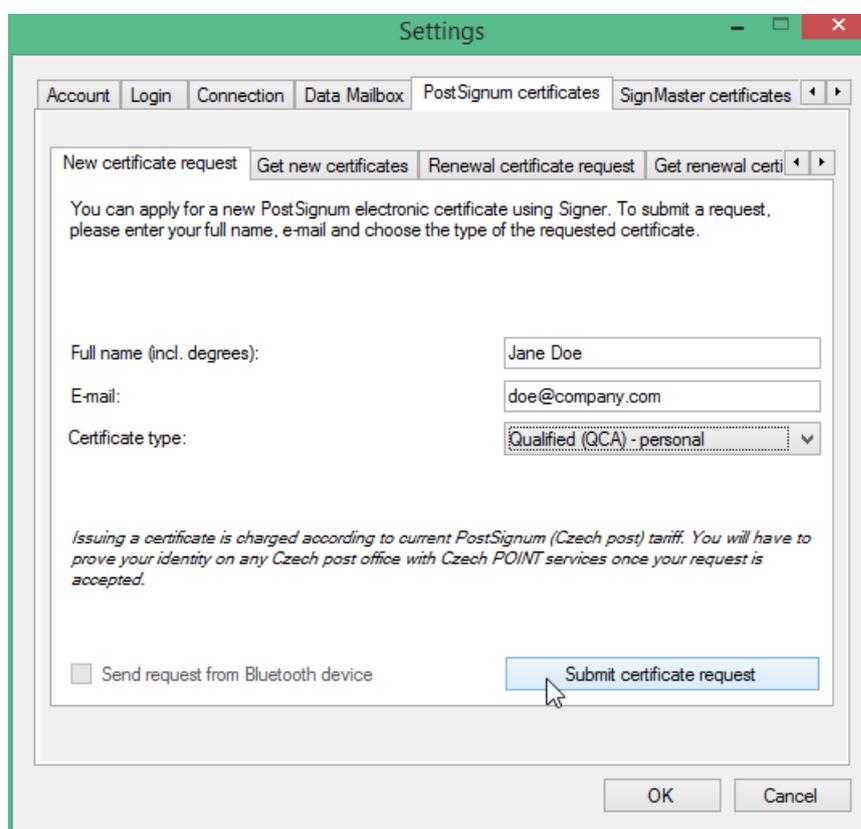
7.5.1. New certificate request

If you do not have a digital certificate yet or you are missing a certificate of a specific kind, you can create a new certificate request on this tab and submit it digitally.

Enter your name (title, first name, surname) and your e-mail address into the first two fields. Select the **Certificate type** to be requested (QCA personal or system or VCA personal).

If you have a Bluetooth device available and want to apply this way, check **Send request from Bluetooth device**.

Submit the request for processing by clicking **Submit certificate request**.

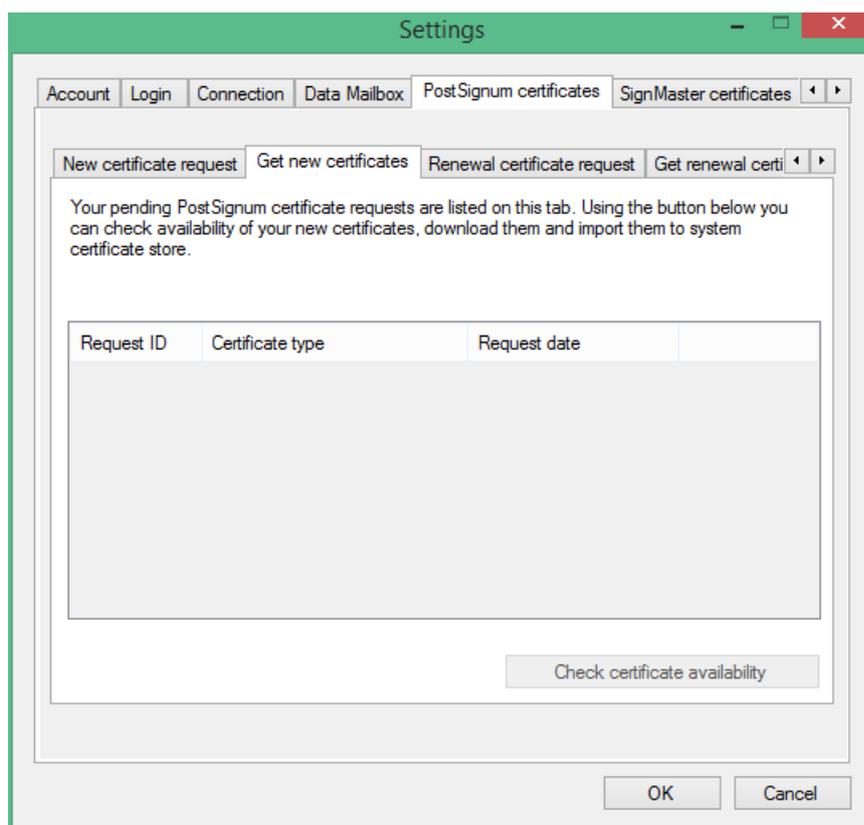


When the request is approved, you will receive an e-mail notification with instructions to visit a Czech POINT office to confirm your identity and pay the certificate issuance fee.

7.5.2. Get new certificates

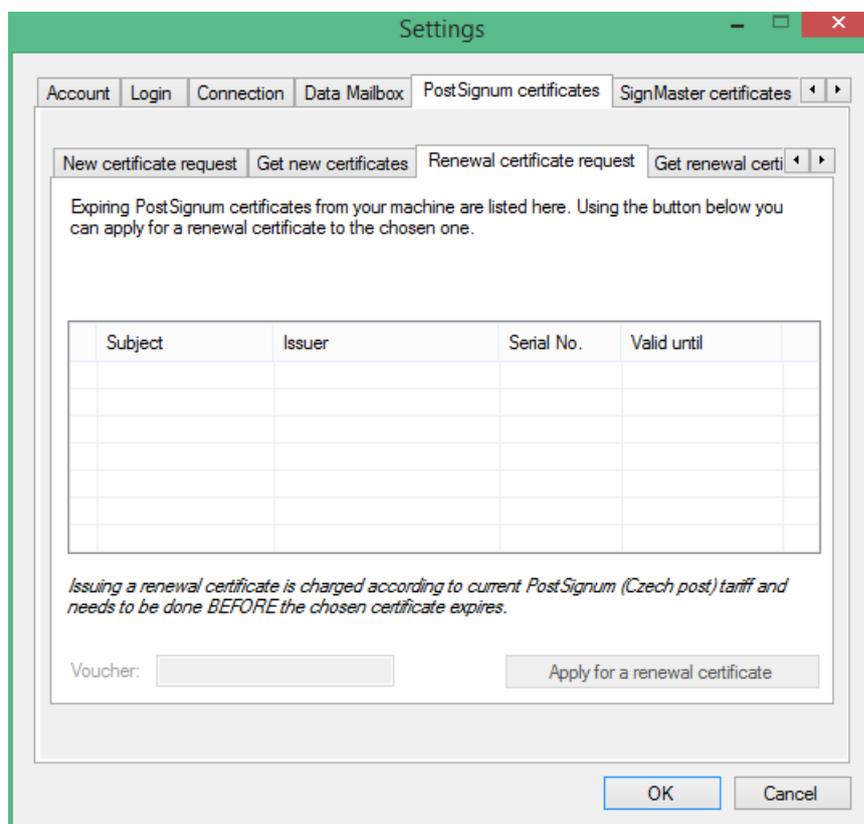
After you submit the certificate and confirm your identity, wait for your certificate to be issued. The **Get new certificates** tab displays a list of your new certificate requests.

You can check whether your certificate is ready for collection by clicking **Check certificate availability**. If your certificates are available, download them and import into your certificate store.



7.5.3. Request for certificate renewal

The validity of a digital certificate is limited – usually to one year. When it expires, it is usually possible to request its renewal. That means that after paying the corresponding fee, a certificate of the same type and to the same name is issued for the next validity period – with no need for the whole process of request and approval.



The **Renewal certificate request** tab displays a list of your PostSignum certificates that are nearing expiry (i.e. within 20 days).

Click on the certificate you would like to renew and click **Apply for a renewal certificate**. The request is submitted to the PostSignum authority. Note that the fee for issuing a renewal certificate must be paid before the original certificate's expiry.

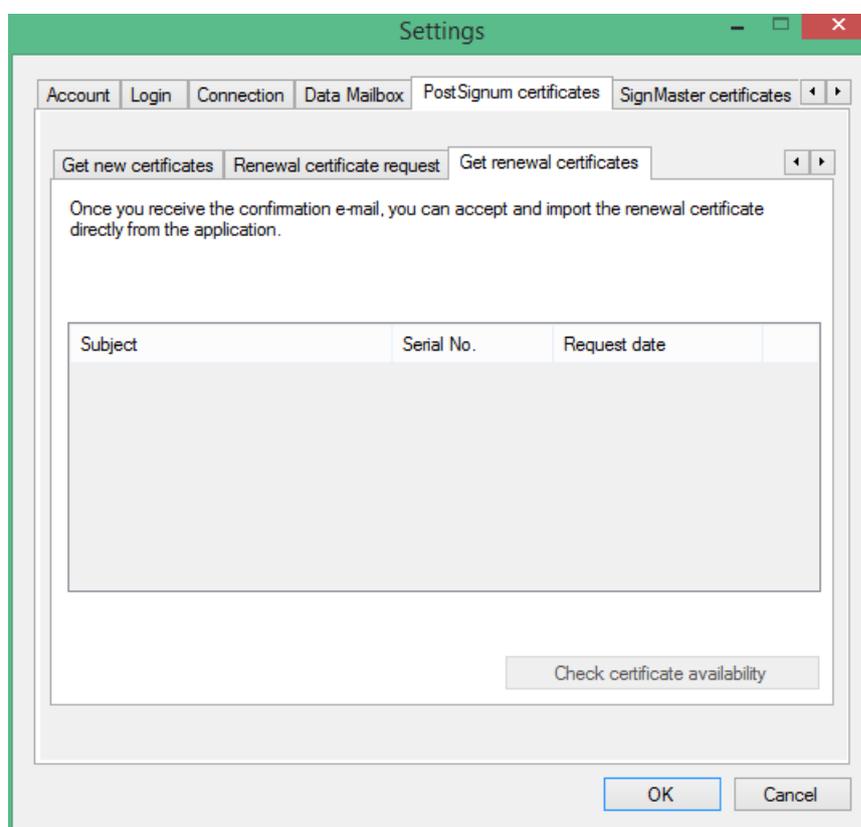
Use the **Voucher** field to enter the code you have received on your purchase of Software602 Signer certificate package on PostSignum website.

7.5.4. Get renewal certificates

After you submit the request, wait for the issue of the renewal certificate. The **Get renewal certificate** tab displays a list of your requests for renewal certificates.

You can check whether your certificate is ready for collection by clicking **Check certificate availability**.

If your certificates are available, download them and import into your certificate store in the same manner as when installing new ones.



7.6. SignMaster CA certificate request

You can request a certificate from Private certification authority SignMaster CA directly from *Signer*. The request you fill in and submit is passed on to your administrator and its result is sent to the electronic mail address you supply.

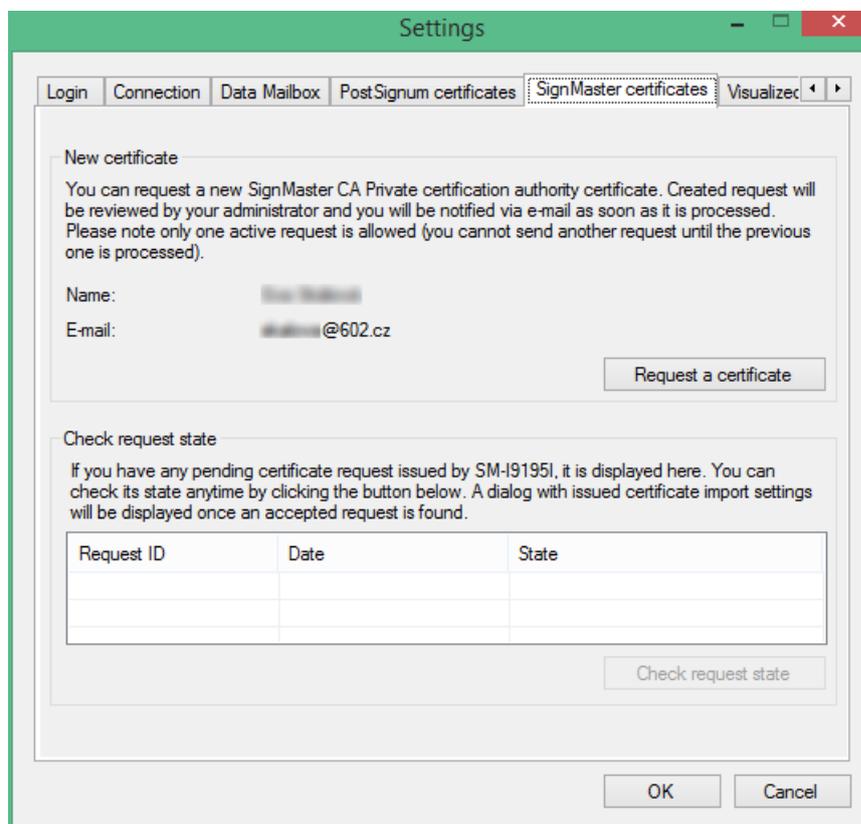
Note – this option is only available in connection to Signer Bluetooth Token.

Submit the request by clicking **Request a certificate**.

Note – you can only submit one request. You cannot submit more requests until the previous one is processed.

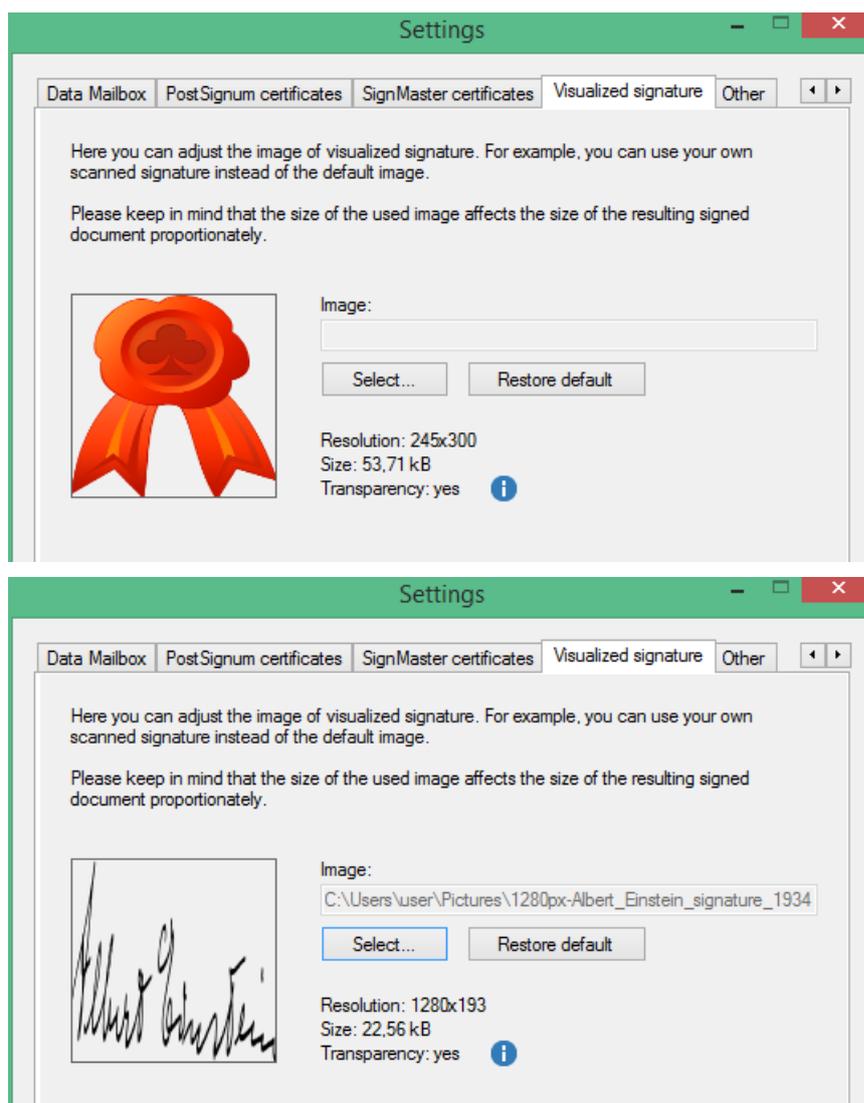
Pending requests are displayed in a list in the lower section of the **SignMaster certificates** tab in the configuration dialog. You can update the list status anytime by clicking **Check request state**.

Once the request is processed, a dialog to install the certificate is displayed.



7.7. Visualized signature

The standard signature symbol that is placed in the document to show that it has been signed can be replaced by another symbol. Set up the symbol on the **Visualized signature** tab.



Prepare a signature image of a suitable size (in one of the graphical formats such as JPG or BMP).

Click **Select** to open the file selection dialog. Select the signature image file. The image is then displayed in the preview window on the left side of the dialog. Click **OK** to confirm. This image will be inserted in all documents where you select to attach a visualized signature.

If you decide to return to the original symbol provided by *Software602 Signer*, click **Restore default**.



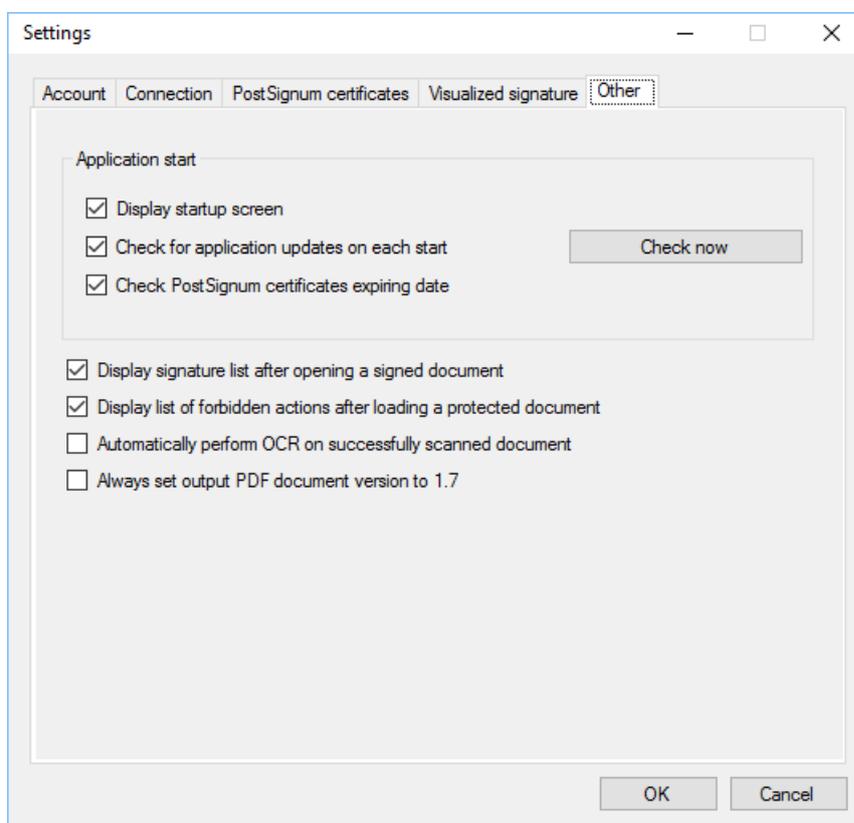
7.8. Other settings

The last settings tab, **Other**, allows you to enable or disable checks run on the application startup, manually check for application updates, set automatic insertion of a text layer when scanning using OCR or set signatures to be displayed when opening a document.

Check the corresponding box to **Display startup screen**, which displays nine large buttons with basic features on application startup, automatically **Check for application updates on each start** or **Check PostSignum certificates expiring date** if you have installed some of these certificates.

You can also check for any application updates manually by clicking **Check now**.

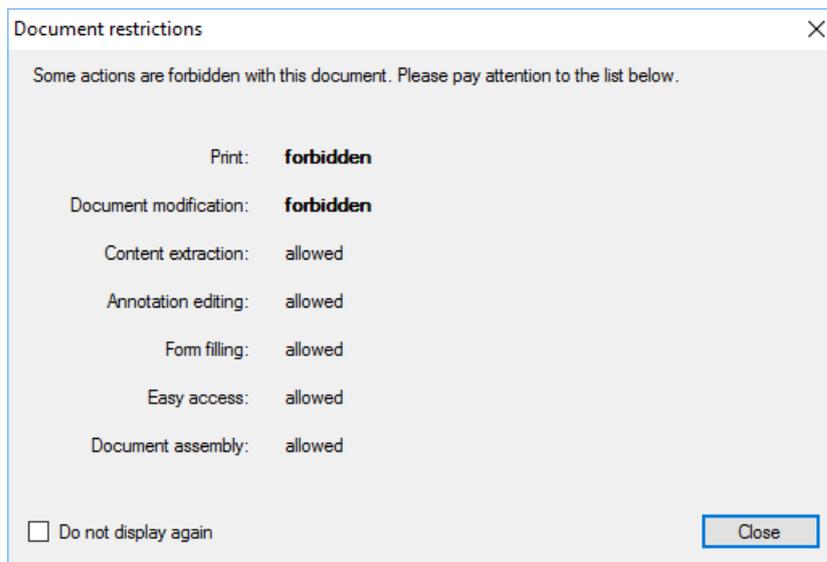
If you want to create a text layer automatically when scanning a document using Optical Character Recognition, check **Automatically perform OCR on successfully scanned document**.



If you check **Display signature list after opening a signed document**, a dialog with a list of all digital signatures and time stamps will be displayed every time you open a signed document.



Another option is **Display list of forbidden actions after loading a protected document**. If this option is checked and you open a secure document, a dialog window will be displayed with information about actions forbidden in the document.



Check **Set web service output PDF document version to 1.7** to set the version 1.7 as the default one when receiving PDF documents from the web service.

If **Log created electronic signatures** is checked, information on handling electronic signatures will be logged.

If you check **Alert me when closing PDF document prior to signing Office document**, a warning about closing a file before signing will be always displayed when signing a document from the Office family.

8. Integration in Microsoft Office 365

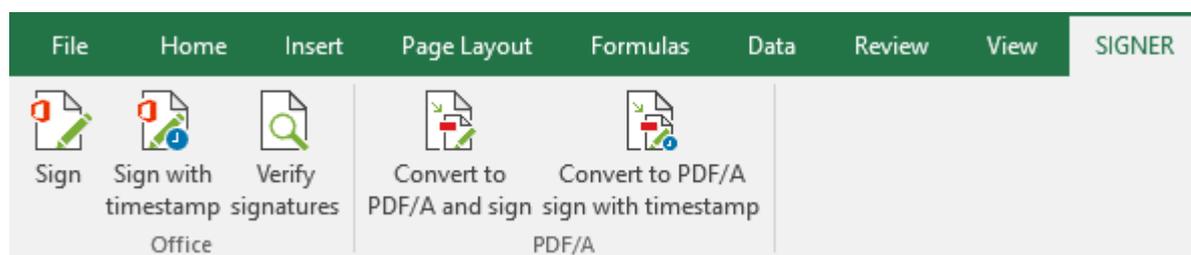
To facilitate using electronic documents, there are macros integrated in Microsoft Office 365 applications Word, Excel and PowerPoint (2007–2016). These macros enable you to sign Word and Excel documents using an electronic signature with or without a time stamp, convert them to the archival format, PDF/A, including a signature and a time stamp, or verify whether documents contain valid electronic signatures.

8.1. Macro Functions

When you install Signer, the macro will be displayed in the main “ribbon” menu of the Office application under the command of the same name. Click it to select from all the functionalities you might need to sign Office documents, convert to PDF/A and validate signatures.



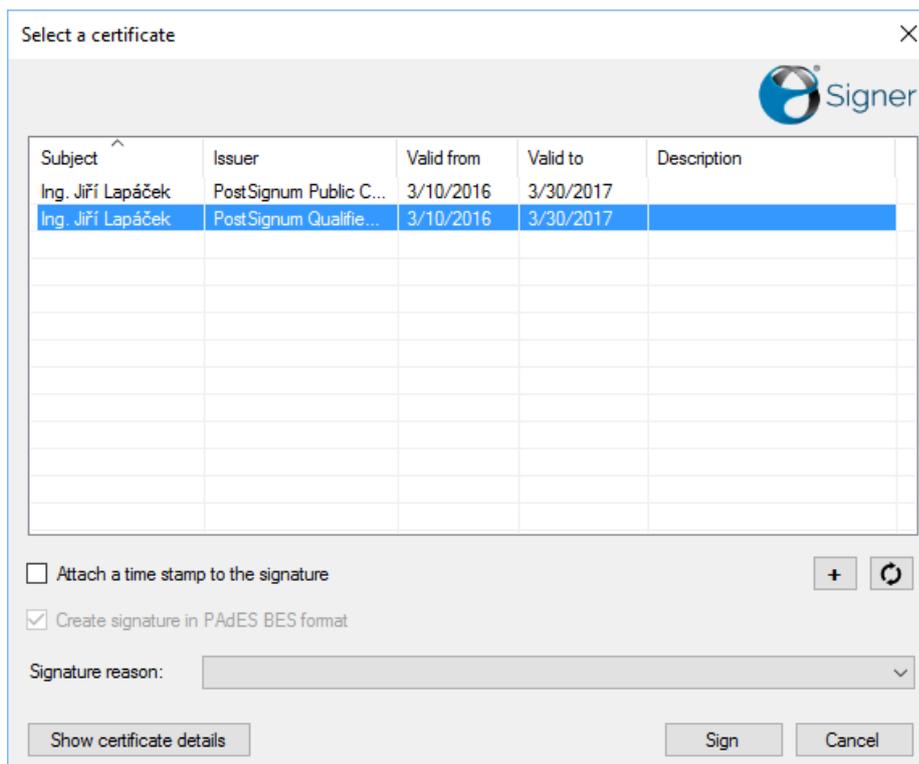
Macro view in Microsoft Word 2016



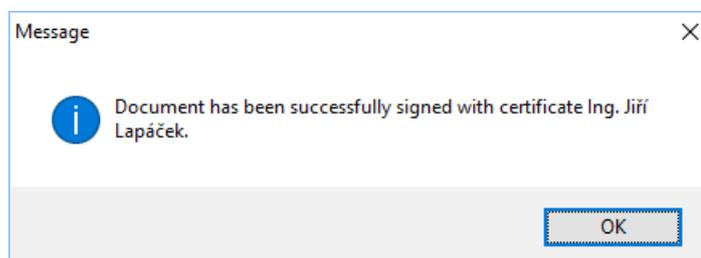
Macro view in Microsoft Excel 2016



Click the **Sign** or **Sign with timestamp** option to send the Office document to the Signer application; after you sign in, it will display the usual certificate selection window with options for selecting a time stamp and the reason for signing the document.



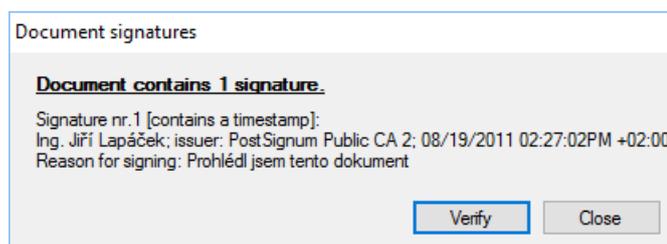
Now click **Sign** to sign the document. You will be notified about it by the message **Document has been successfully signed with certificate xxx.**

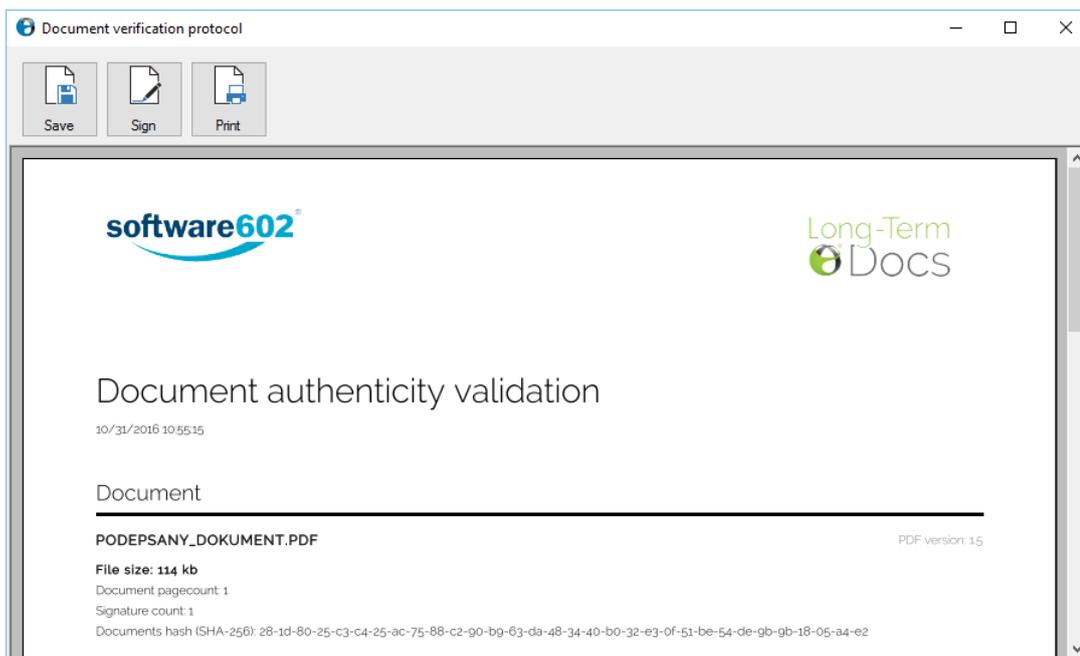


When you confirm the notification by clicking OK, the standard file saving dialog for the signed document will be displayed.



The **Verify signatures** option will display the complete information whether the document contains an electronic signature, to whom the signature certificate has been issued, who is the issuer and its validity period. This information along with other details, such as the signature type and format, validity and integrity of the document, can be displayed in an output PDF clause by clicking **Verify**.

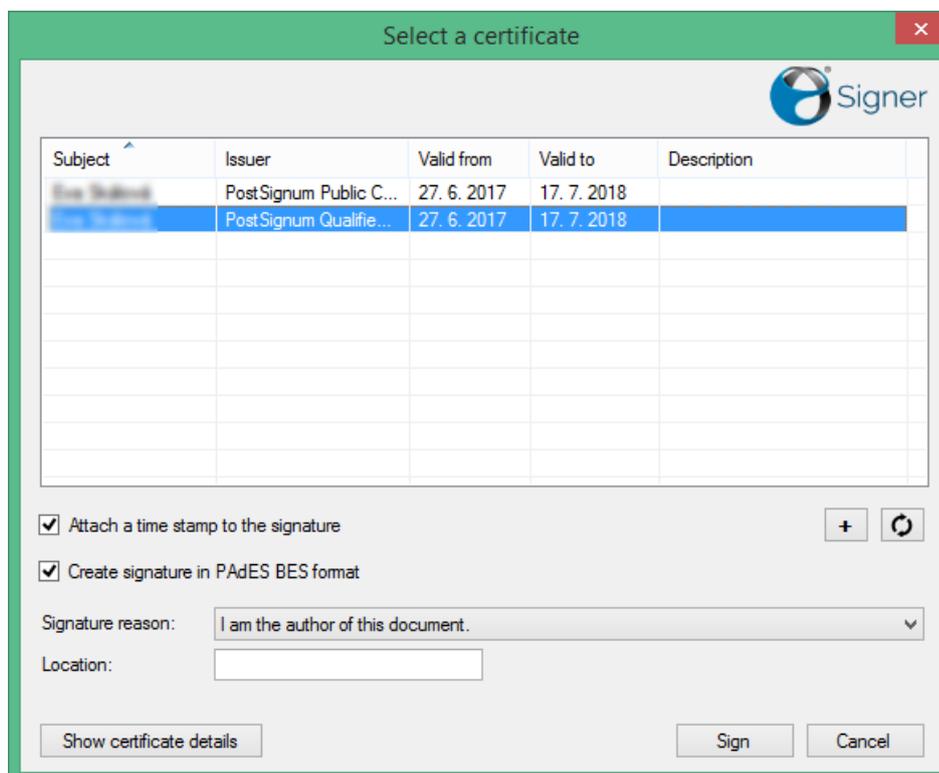




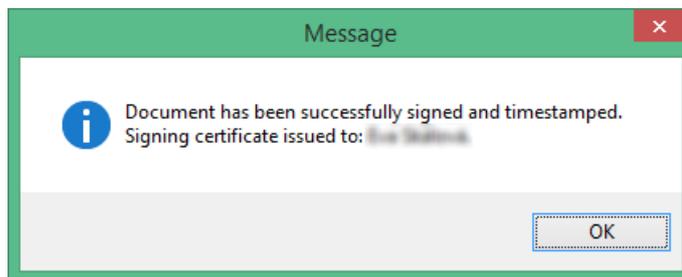
You can digitally sign the PDF clause and save it on your device or print it.



The group of buttons **Convert to PDF/A and sign** and **Convert to PDF/A and sign with timestamp** converts Office documents into an archival format, PDF/A, and then displays a window with selection of an electronic signature certificate and the options of attaching a time stamp and the reason for signing, as well as the option to create the signature in compliance with the PAdES-BES specification.



Click **Sign** to sign the PDF document. You will be notified about it by the message **Document has been successfully signed with certificate xxx and timestamped.**



When you confirm the notification by clicking OK, the standard file saving dialog for the signed PDF document will be displayed.

Note: When there is no document open in the Office application, all the above described macro options will display a file open dialog. If a new, opened Office document has not been saved yet, all the above described macro options will display a file save dialog.

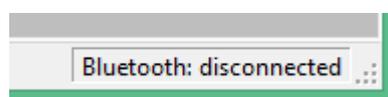
9. Remote signature certificate store

This feature enables you to set up a remote store of signature certificates on a mobile device, which can then be connected to and used anywhere and anytime for document signing.

9.1. Running the necessary applications

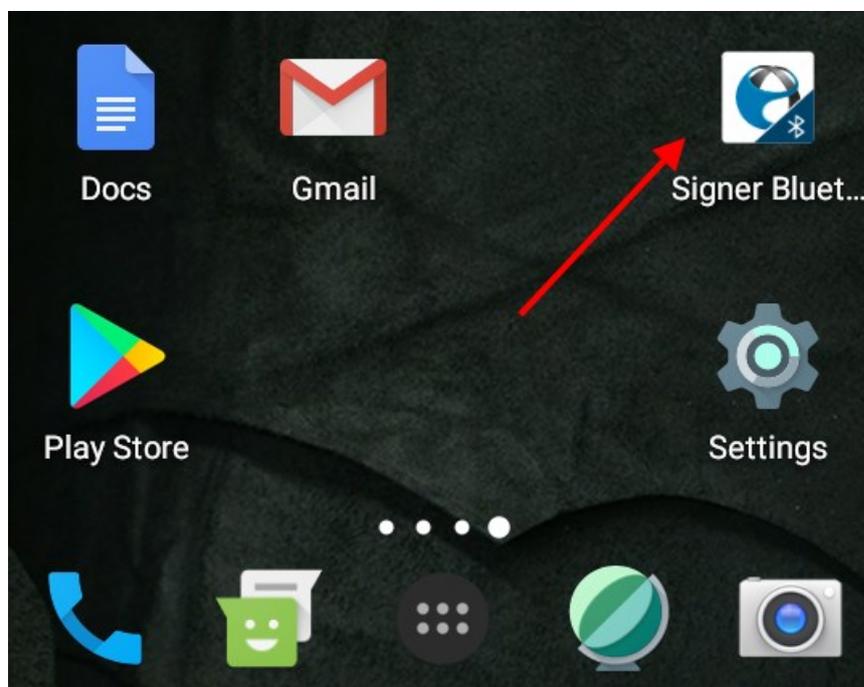
Communication between the computer and a mobile device, which is to serve as a remote signature certificate store, uses the *Bluetooth* interface with the help of two applications – your *Signer* application and, on the mobile device, *Signer Bluetooth Token*.

Run *Signer* on your computer. You will find a *Bluetooth* connection indicator in the lower right corner of the application. If the connection is not established, the indicator shows **Bluetooth: disconnected**.



Run *Signer Bluetooth Token* on your mobile device. Every time you want to establish connection, you will need to manually enable it in the application window.

You can download the application from the list of current products listed on the following page: <https://play.google.com/store/apps/details?id=cz.software602.signertoken>.



9.2. Pairing devices

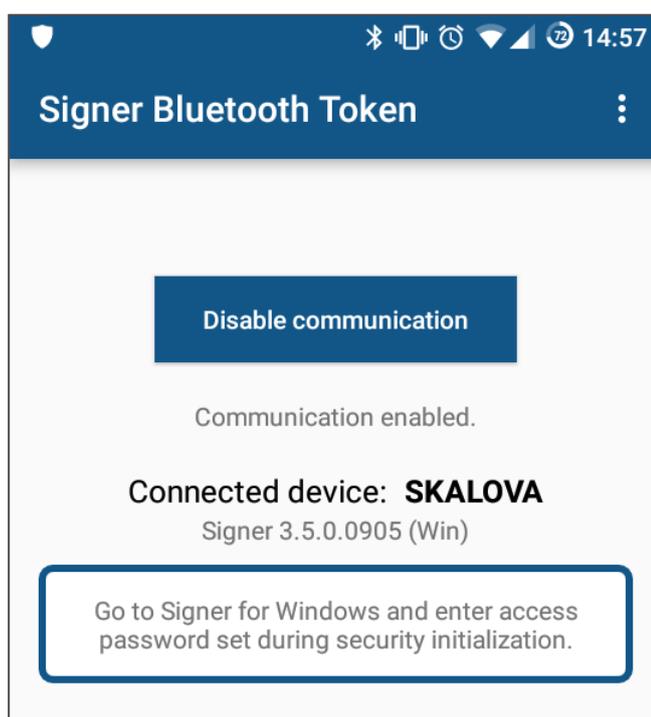
The procedure differs based on whether this is the first pairing of the two devices or "routine". That is because the pairing is done using system tools; the *Signer Bluetooth*

Token application does not provide pairing – it expects the two devices to be paired already.

An essential requirement for the pairing is fulfilling the hardware requirements – *Bluetooth interface* support on both the devices. If the interface is not available on the computer, you can easily supplement it by a so-called *Bluetooth dongle* (miniature Bluetooth adapter connected simply by attaching it to a USB interface).

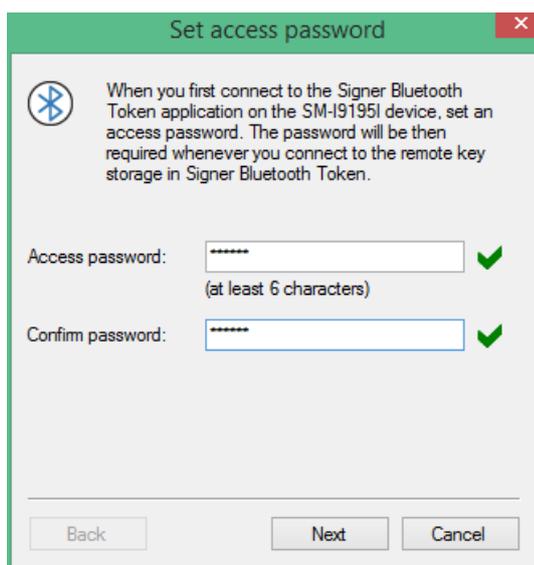
9.2.1. First pairing of the devices

When pairing the devices for the first time (the devices “do not know each other yet”), you need to follow the instructions and initialize the additional security features for this one time.



The first task is to set an access password. The *Signer* application displays the dialog **Set access password**. Use the two fields to enter and reenter the password. Without this password it will not be possible to access the remote key store again.

Enter the access password in the **Access password** field and again in the **Confirm password** field. Then click **Next**.



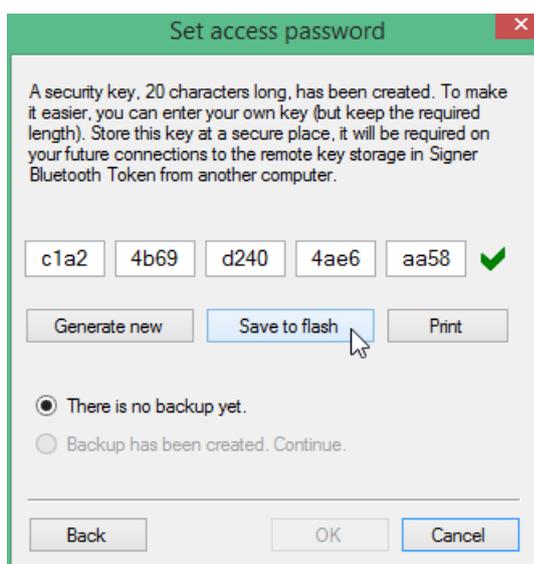
The dialog continues by generating a security key – a string of twenty characters.

The fields are editable, so you do not need to accept the offered values, you can enter your own combinations instead to make them easier to remember.

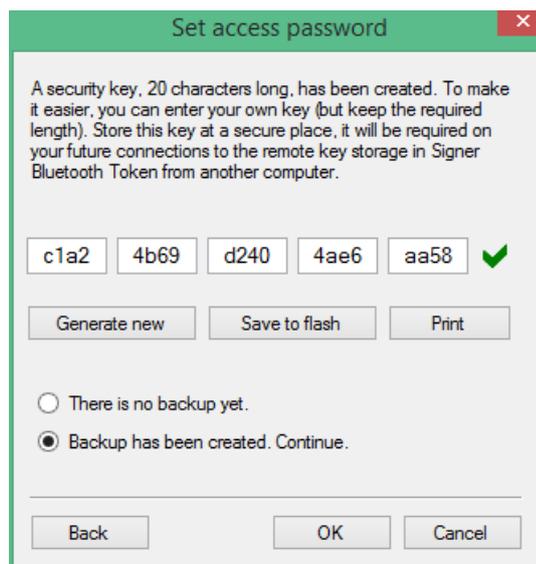
Store this key at a safe place; it will be requested for example when connecting to the remote certificate store in *Signer Bluetooth Token* from another device than the one you are using right now. Note – this is not a safeguard against forgetting your 602 ID access password.

Click **Save to flash** to store the key at the selected memory device – preferably a portable (flash) disk. You can also print out the security key on paper by clicking **Print**.

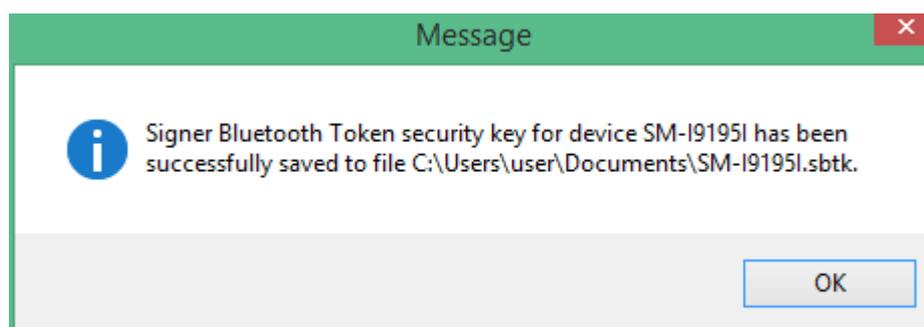
If necessary, you can click **Generate new** to create another security key.



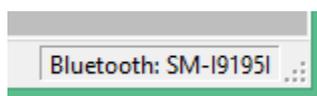
Until the back-up is created, the switch in the lower part of the dialog is in position **There is no backup yet**. When the back-up is created, the item **Backup has been created. Continue** is enabled along with the **OK** button, which you can click to accept the backup setting.



After clicking **OK**, a window is displayed with information on creating and saving the security key and the location where the key was stored.

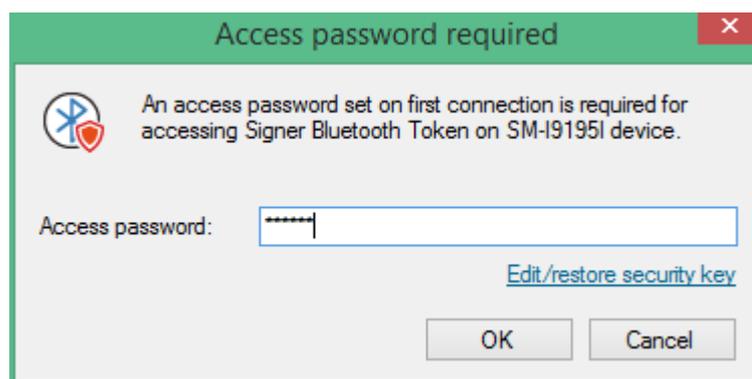


Only then the indicator in the lower right corner of the *Signer* application shows successful connection to a mobile device.

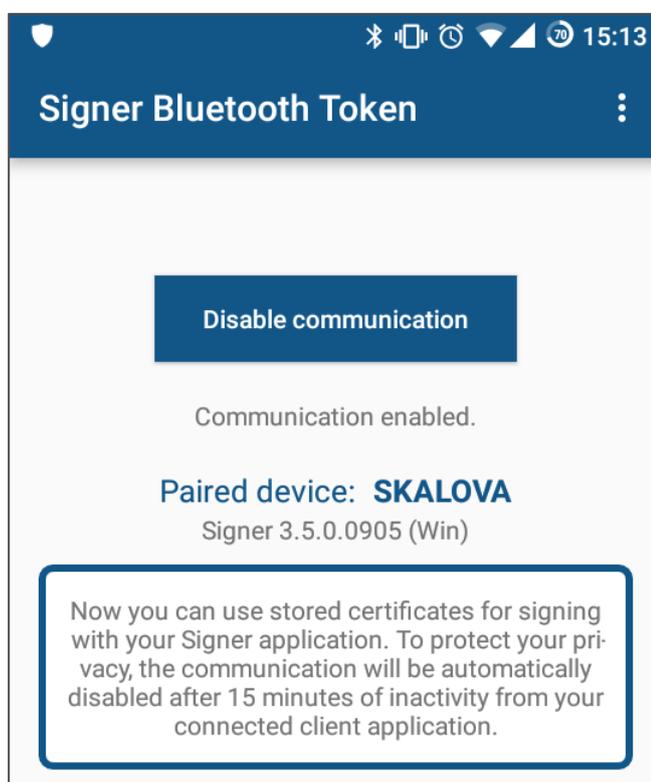


9.2.2. Routine pairing of the devices

Once the access password has been created (and the security key generated), the whole process is simplified and the pairing is only run on the software level. After the two devices establish connection, the dialog **Access password required** is displayed, this time only with a field for entering the password. If necessary, you can also use the dialog to modify the security key. This is in case of incorrect entry (typing error) or to allow restore from a flash disk backup.

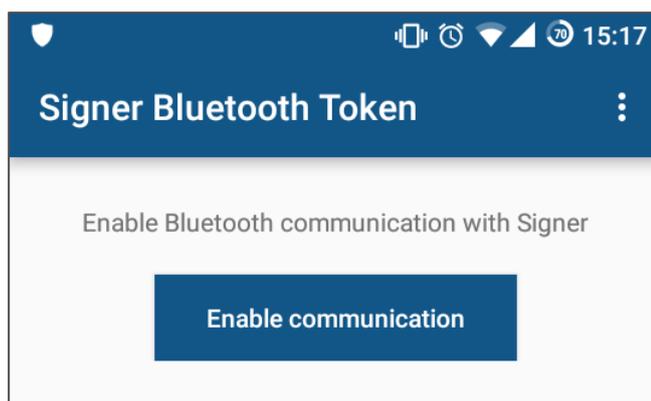


Besides the message about communication permission, the mobile device displays also instructions for using digital certificates. For your reference, it also displays the version of *Signer* application connected from your computer.

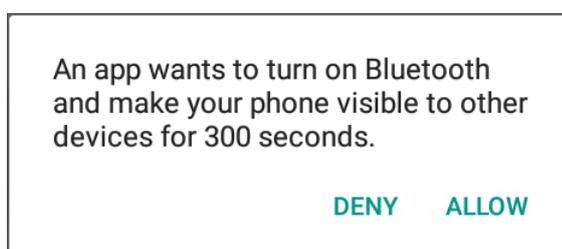


9.3. Establishing connection and allowing communication

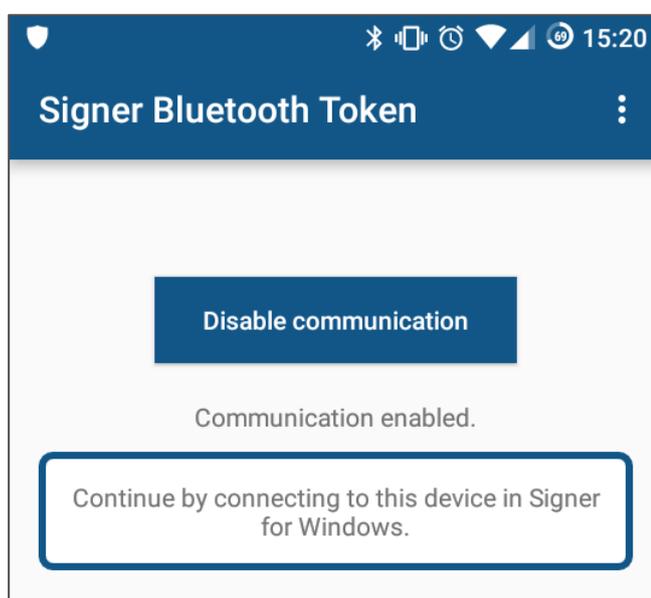
When you run the *Signer Bluetooth Token* on your mobile device, a dialog window will ask you to allow communication with *Signer* using the *Bluetooth* interface. Tap **Enable communication**.



Confirm the next query by tapping **Allow**.

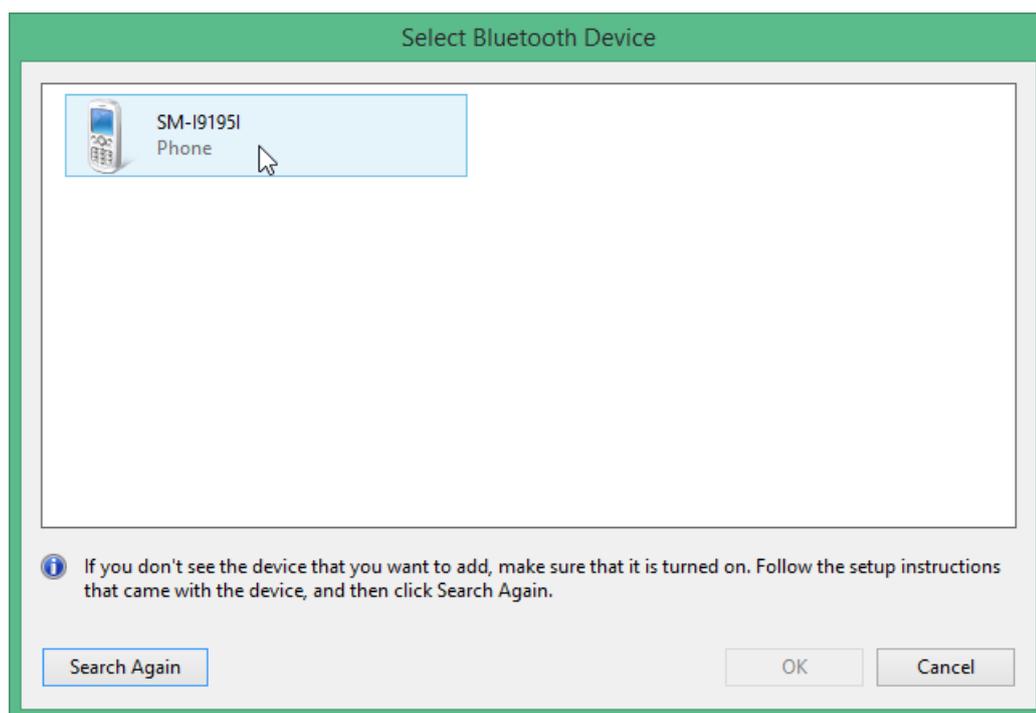


Once the communication is enabled on the mobile device, the message **Communication enabled** is displayed with a request to select the mobile device in the *Signer* application.



Go to *Signer* on your computer and double click the indicator **Bluetooth: disconnected**.

A window titled **Select Bluetooth Device** will be displayed with a list of all currently available *Bluetooth* devices. Click on the item that corresponds to your mobile device and then the **OK** button. If your device is not displayed, try refreshing the list using the **Search Again** button.



After the mobile device is selected in *Signer*, software pairing of your computer with the selected mobile device takes place. You will be notified about it by a message on the mobile device.

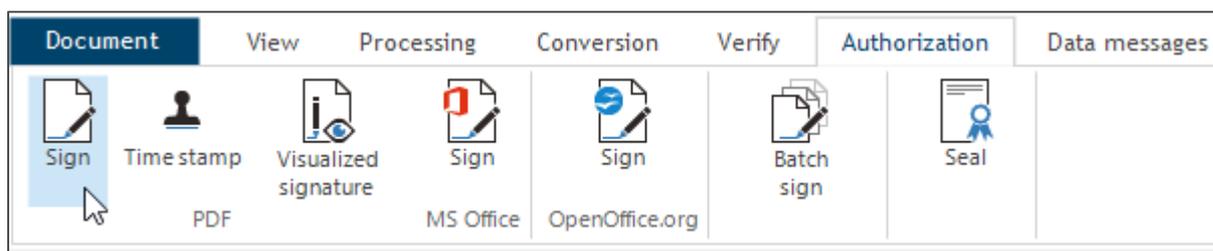
9.4. Importing a certificate to the mobile device

Now you can store any of your certificates to the mobile device as a remote store and use it to sign documents.

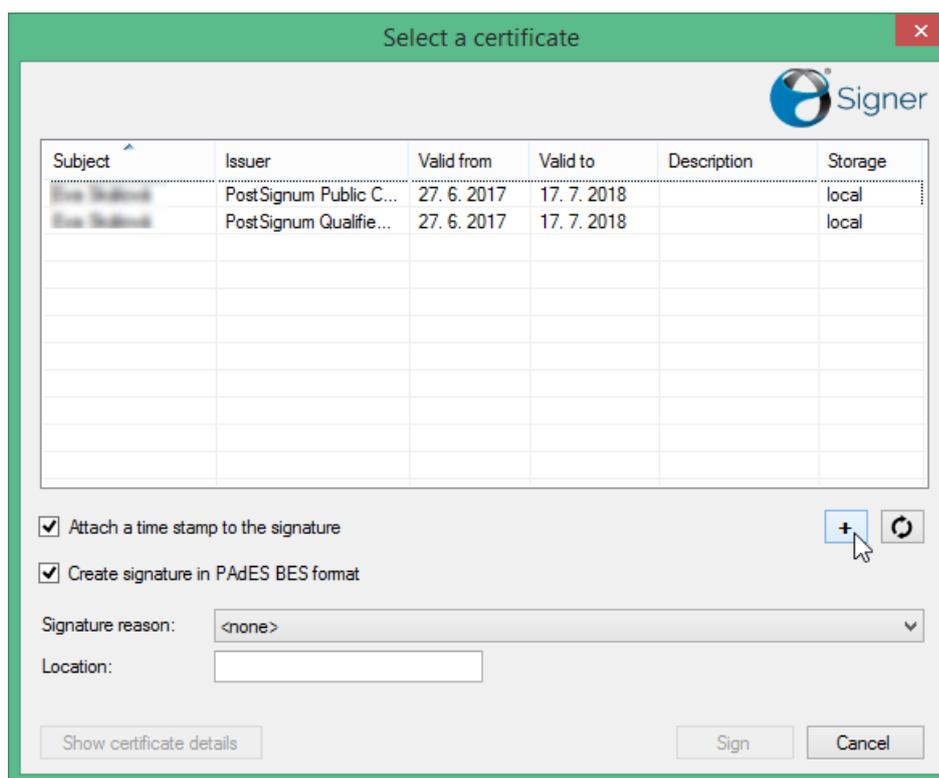
There are two ways: You can either open the certificate selection dialog from a loaded document and start the import from there or go to the **Bluetooth Token** tab and click **Add a certificate**.

9.4.1. Import from the certificate selection dialog

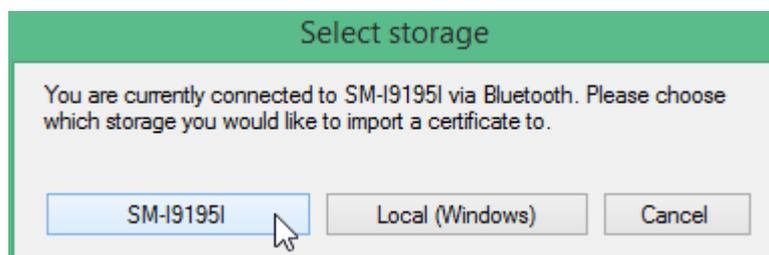
To insert a certificate using the certificate selection dialog, open any document, go to the **Authorization** tab and click **Sign**.



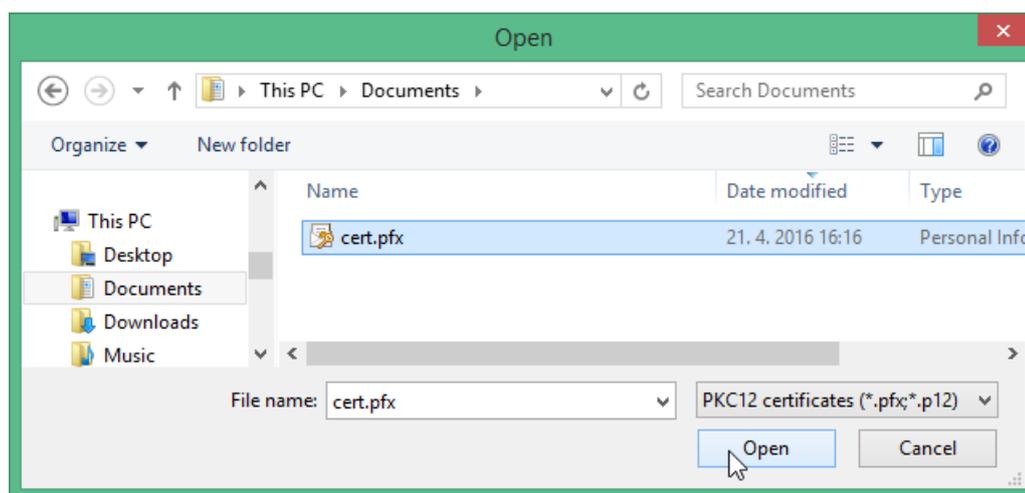
In the **Select a certificate** dialog, click the button with the “**plus**” symbol.



In the following dialog, **Select storage**, select where to import the certificate. Click the button with the name of the connected mobile device.



In the file selection dialog on your computer, select the copy of the certificate to be imported and click **Open**. Only the PKCS12 format (with .pkcs12 or, more often, .pfx extension) is allowed.



The rest of the procedure is the same for both options.

9.4.2. Import using a toolbar button

If you select the shorter procedure using the **Add a certificate** button on the **Bluetooth Token** toolbar, a dialog will be displayed where you can specify the path to the certificate copy you want to use (see the picture above).



Click **Open**. The rest of the procedure is the same for both options.

9.4.3. Finalizing the import

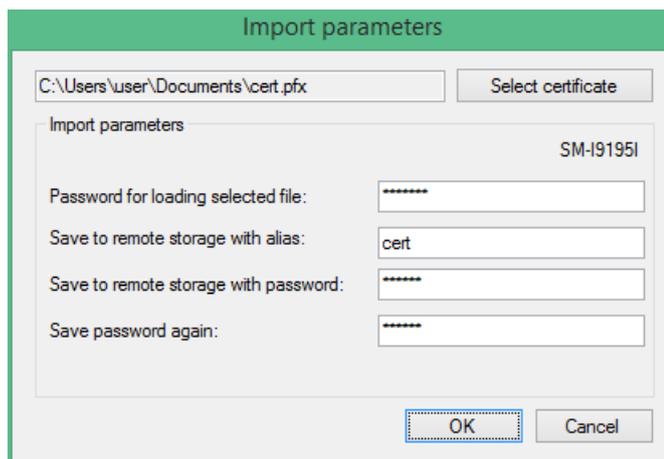
The next step is the **Import parameters** dialog, where you need to set how to import the certificate to the selected store.

The upper part of the dialog displays the path to the certificate, which you have selected previously. You can still change it by clicking **Select certificate**.

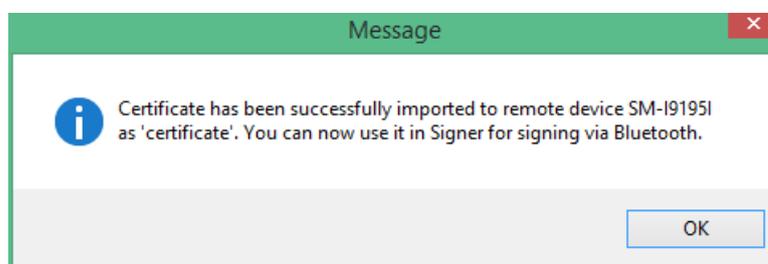
Enter the password you have selected when creating the certificate copy in the field **Password for loading selected file**.

The field **Save to remote storage with alias** contains a name that will be used for the certificate in the remote store. The name used for your installed copy is suggested as default.

Enter the password which will secure the use of the certificate twice – in the fields **Save to remote storage with password** and **Save password again**.



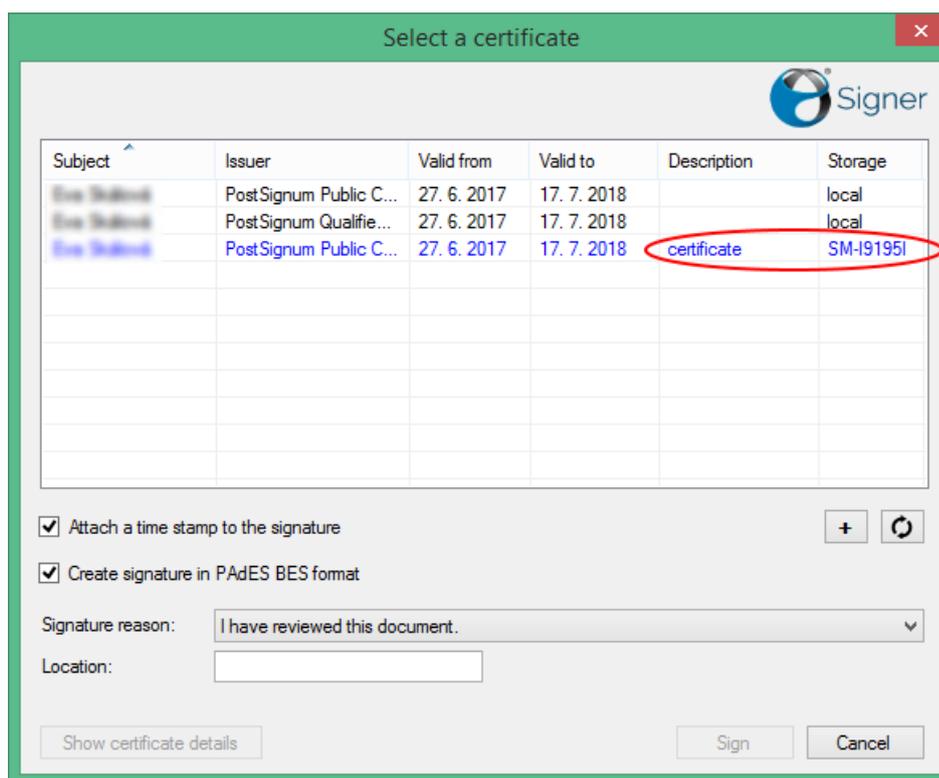
Click **OK** to install the certificate and you can start using it.



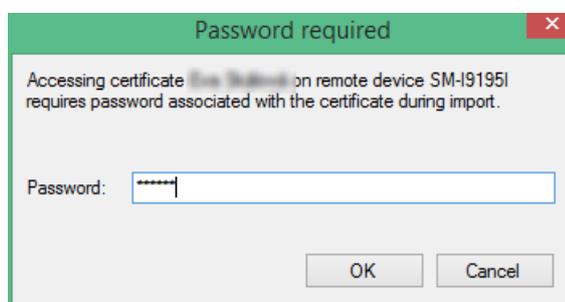
9.5. Using the certificate to sign documents

A signature certificate, even when installed in a remote store, is visible in the **Select a certificate** dialog as long as the connection between the computer and the corresponding mobile device is established. The item is displayed in a different color and it can be used in the same way as common certificates installed on the computer locally.

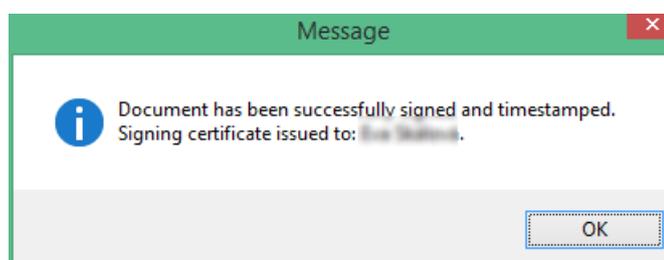
In the **Select a certificate** dialog, select the corresponding item, adjust other parameters if needed, and click **Sign**.



Enter the access password to the certificate in the field **Password required**. Click **OK**. If you have entered the correct password, the document is then signed in the required manner and, if requested, also provided with a time stamp. If the correct password is not entered, the document cannot be signed and an error message is displayed instead.



At the end of the process, a regular message about attaching a signature (and time stamp) is displayed.

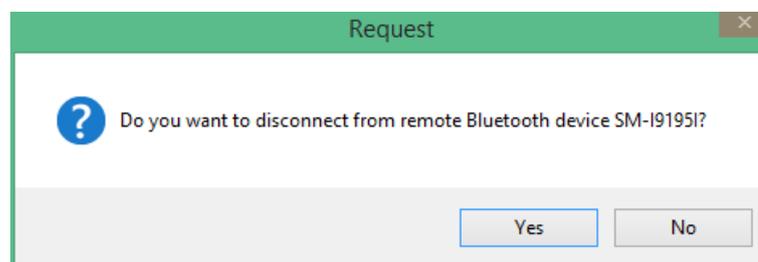


9.6. End of connection

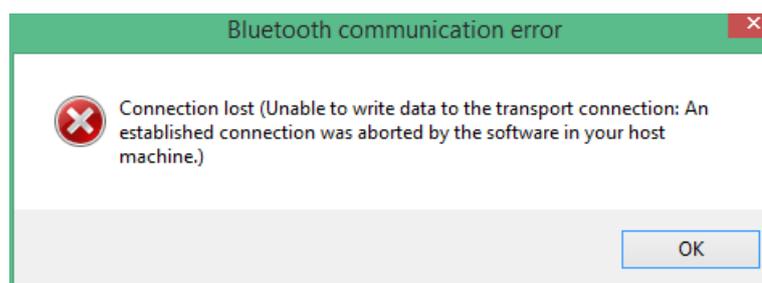
You can only sign documents from the remote certificate store if connection is established between the computer and the remote device.



To end (interrupt) the connection, click **Disconnect device** on the **Bluetooth Token** toolbar tab on your computer. After clicking **Yes** in the confirmation dialog the connection will be ended. There is also another method of disconnecting by double clicking on the device name in the status bar.



To end the connection from the remote end, tap **Disable communication** in the *Signer Bluetooth Token* application window. Any subsequent attempts at communication with *Signer Bluetooth Token* from your *Signer* application will be refused.



You can also come across a situation where *Signer* tries to connect to a mobile device, but fails to connect within a certain time (this situation is similar to the one when a time limit is exceeded when loading a web page).

The *Signer Bluetooth Token* application on the mobile device acts as a server, that is, only fulfills requests; it does not send anything by itself. Therefore *Signer* does not learn automatically about the end of connection at the moment it is disconnected – it only finds out during the next communication attempt.

If you need to restore the connection, you have to select the remote device again and continue by entering the corresponding PIN (as described in chapter *Establishing connection and allowing communication* on page 74).

Go to the *Signer Bluetooth Token* application window and click **Enable communication** to request a new connection.

To make *Signer* available for another connection, click **Connect device** on the **Bluetooth Token** toolbar tab. You can also use the indicator in the lower right corner of the window.

When the communication is restored, the installed certificates will be available again and you can use them to sign documents.

