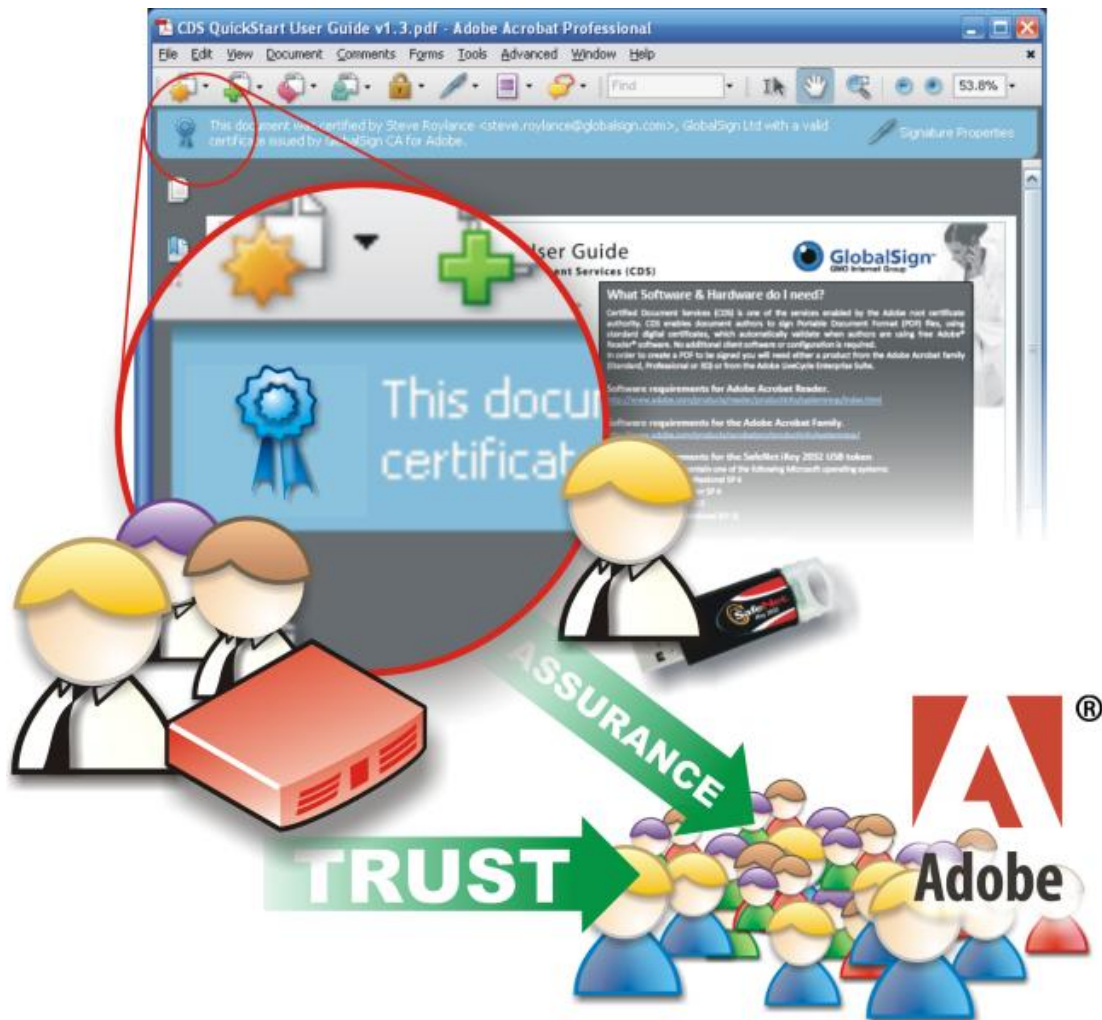




DocumentSign™ User Manual (v1.4) PersonalSign™ Pro and DepartmentSign™

DocumentSign™ from GlobalSign complies with Adobe's Certified Document Services (CDS) Solution enabling more secure, reliable electronic document exchange. Authors of PDF documents can add electronic Certifying Signatures and Approval Signatures to documents they distribute over the Internet. This process is the virtual equivalent to sealing a document and adding wet-ink signatures by assuring the recipient that the document is authentic, comes from a verified source and the contents has not been tampered with since being published.

Please note that within this help guide, all screen captures are created with version 8.11 of the Adobe Acrobat and Adobe PDF reader. For information relating to earlier versions of Adobe Acrobat or Acrobat reader, please refer to the relevant Adobe Acrobat help system.



For more enhanced details on anything in this user guide please refer to:

www.globalsign.com
support@globalsign.com
US: 877 775 4562
UK: +44 1622 766766
EU: +32 16 89 19 00
JP: +81 03 5728 1551

1. Useful numbers and answers to FAQ's

Technical Support

All technical questions regarding your certificates should be forwarded to our Support Department, but please first have a look at our FAQ's. (<http://www.globalsign.com/support/techfaq.html>) It is very likely that this will allow you to find an answer to your question and this also allows us to solve your issue most efficiently.

- Email: support@globalsign.com
- Support Web Site

Vetting Department



Fax your vetting documents to your regional office

- Tel US: 866 511 5035
- Email: ra@globalsign.com

- Fax vetting documents to:
- Fax US: 617 830 0779

Vetting Department



Fax your vetting documents to your regional office

- Tel EU English speaking: +44 1622 766766
- Tel EU Non-English speaking: +32 16 891900
- Email: ra@globalsign.com

- Fax vetting documents to:
- Fax EU: +32 16 79 52 30

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3. General Principles:- What is DocumentSign?

DocumentSign is the solution through which GlobalSign supports Adobe's Certified Document Services (CDS) technology. CDS offers the ability to apply inherently trusted digital signatures into PDF documents. CDS is one of the services enabled by the Adobe root certificate authority. CDS enables document authors to sign Portable Document Format (PDF) files, using a GlobalSign DocumentSign digital ID, which automatically validate when authors are using free Adobe Reader® software. No additional client software or configuration is required.

CDS was designed to enable organizations and individuals who publish high-value documents to large and disparate recipient groups to increase the assurance level that the document's integrity and authenticity are preserved. By adding a CDS signature to a PDF file, document authors can increase this assurance level without requiring recipients to deploy additional software.

CDS first appeared with version 6.0 of Adobe Acrobat and version 7.0 of Adobe Enterprise Server. Automatic signature validation capabilities appeared in Adobe Reader 6.0. It is recommended that you use the latest release of Adobe supported products as these provide a greater level of functionality.

4. Getting Started - What Software & Hardware do I need?

4.1. Software requirements for Adobe Acrobat Reader.

<http://www.adobe.com/products/reader/productinfo/systemreqs/index.html>

4.2. Software requirements for the Adobe Acrobat Family.

<http://www.adobe.com/products/acrobatpro/productinfo/systemreqs/>

For more details on these products see the Adobe web site. <http://www.adobe.com/products/acrobat/readstep2.html>



Acrobat Reader (Free)

Acrobat 9 Standard

Acrobat 9 Extended

Acrobat 9 Pro Extended

This section of the user guide is applicable to both the PersonalSign and DepartmentSign products that utilize a USB token for Acrobat desktop digital signatures. Please follow the three simple steps highlighted on the following pages to install the drivers.

An electronic copy of this User Guide is located here:- www.globalsign.com/support/adobe/UserGuide.pdf



Install utilities and drivers

Insert token when prompted

Initialise token and set password

4.3. Software requirements for the SafeNet iKey 2032/4000 USB token

Your computers must contain one of the following Microsoft operating systems:

- Windows 2000 Professional SP 4
- Windows 2000 Server SP 4
- Windows Server 2003
- Windows XP Professional (SP 2)
- Windows Vista (32 bit or 64 bit)
- Microsoft Internet Explorer V5.5 SP2 or higher

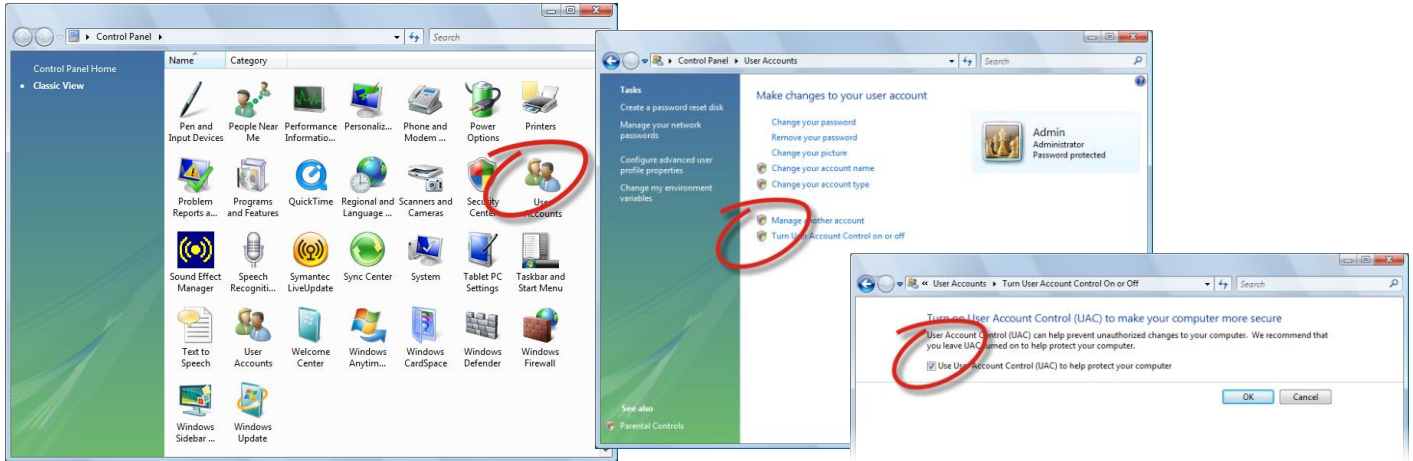
4.4. Hardware requirements for the SafeNet iKey 2032/4000 USB token

Your computer should be comfortably within the processor and memory requirements of your operating system (not the bare minimum), and have the following:

- An available USB port for your USB iKey token

4.5. Microsoft® Vista® users – Turn off User Account Control!

Prior to installation of the iKey drivers, please ensure that the UAC (User Account Control) inside the control panel of your Vista operating system is turned temporarily OFF.



Post installation of the iKey drivers, please ensure that the UAC (User Account Control) inside the control panel of your Vista operating system is turned back on.

4.6. Stage 1 – Utility Installation – SafeNet Utilities

Please download and run the utility installation files from the GlobalSign web site.
(Microsoft Vista users please see the section above for specific information on user account control.)

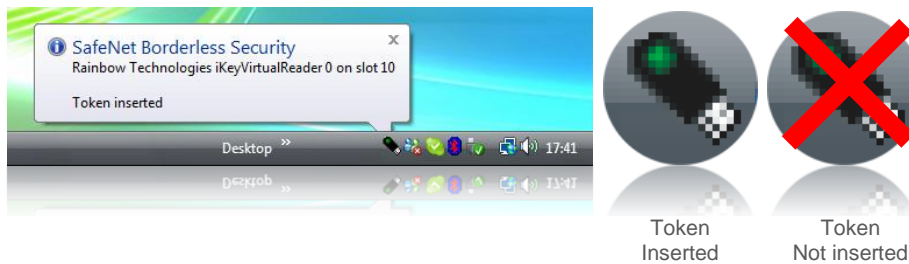
www.globalsign.com/support/adobe/documentsign.msi

4.7. Stage 2 – Install the iKey drivers on to your system.

Please download and run the driver installation utility from the GlobalSign web site

www.globalsign.com/support/adobe/tokendriver.exe (for 32 bit operating systems)
www.globalsign.com/support/adobe/tokendriver64.exe (for 64 bit operating systems)

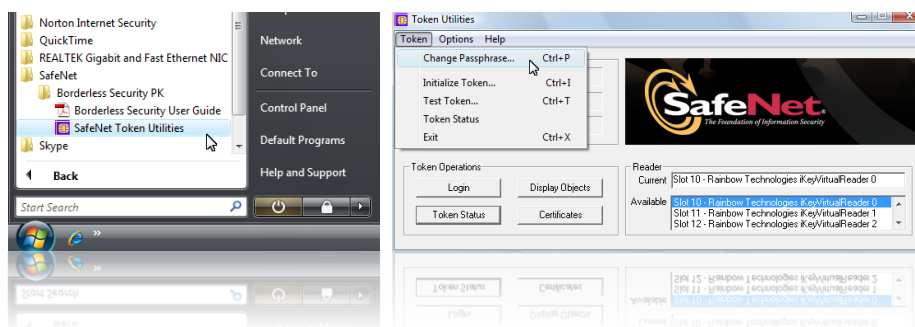
When prompted to do so, insert your iKey into a free USB slot on your PC. Your operating system will then find the relevant drivers for the iKey token and install them. Once installed you will see the iKey token ICON appear in you task tray with the Status of the Token (Inserted) appearing as shown below.



4.8. Stage 3 – Initialise your token and change your iKey Passphrase!

The token is sent to you in a blank format, so you first need to initialise it (See the screen shot below). We then recommend that you modify the passphrase which would have been **Password#1**. The Passphrase will be used to authenticate you as the user of the iKey token each time you sign a document, so PLEASE ENSURE you select a strong Passphrase and that you do not forget it. Also do not confuse this with the 'pickup' passphrase that you set within your GCC account to pick up the certificate.

Incorrect entry of the Passphrase 10 times will deactivate your token and any certificates on it meaning that you will need to go through the certificate install process again.



You now need to refer to the full user guide, as the installation of your certificate is performed in combination with the GCC account that you created.

Please open this document next to install your certificate onto the token via your GCC account.

http://www.globalsign.com/support/ordering-guides/DocumentSign_GCC_Certificate_Enrollment_Guide.pdf

5. Digital Signatures

You use a digital signature much like a handwritten signature—to approve documents. A digital signature verifies your identity and may include a photo, an image of your handwritten signature, or other personal details that you choose. Document authors can attest to the contents of their documents by adding a certifying signature. If you receive a signed PDF, status icons let you know if the signature is valid. If a signature is questionable, you can verify it manually.

5.1. Modify the appearance of your signature.

You can modify your digital signature appearance. For example, you can include a graphic or custom signature.

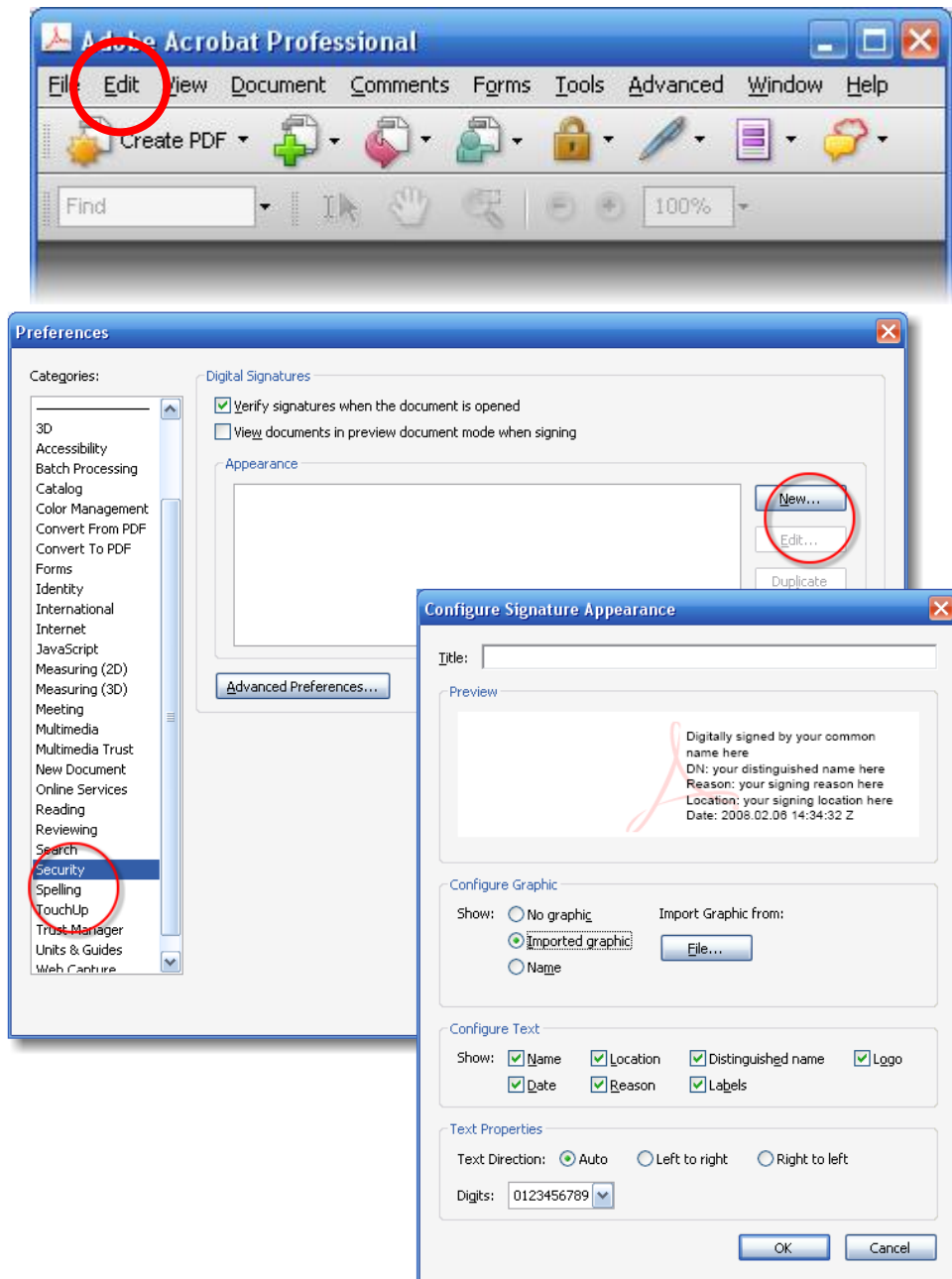
(Optional) Save the desired image on a page by itself, and convert the page to PDF.

Choose Edit > Preferences (Windows) or Acrobat (Mac OS) > Preferences, and select Security.

Click New, and type a title.

(Optional) Select Imported Graphic, click File, and select the desired file.

Specify options as desired.



You can set the appearance of your digital signature by selecting options in the Security Preferences. For example, you can include an image of your handwritten signature, a company logo, or a photograph. You can also create alternate signature appearances that you use for different purposes. For some, you may want to provide a greater level of detail. A signature appearance can also include information that helps others verify your signature, such as certificate revocation status, reasons for signing, contact information, and more. By selecting these preferences, you add options to the Sign Document dialog box that appears each time you sign a PDF.

In the Configure Signature Appearance dialog box, type a title for the signature appearance. When you sign a document, you select the signature appearance by its title, so use a short, descriptive title. For Configure Graphic, choose an option:

- **No Graphic** Displays only the default digital signature icon and other information specified in the Configure Text section.
- **Imported Graphic** Displays an image with your digital signature. Select this option to include an image of your handwritten signature. To import the image file, click File, click Browse, select the image file, click Select, and then click OK (Windows) or Select (Mac OS).
- **Name** Displays only the default digital signature icon and your name as it appears in your digital ID file.

For **Configure Text**, select the options that you want to appear in the signature. Distinguished Name shows the user attributes defined in your digital ID, including your name, organization, and country.

Important: To include a reason and a location in your signature, you must select those options both in this dialog box and in the Advanced Preferences.

For **Text Properties**, specify the writing direction and type of digits (Western or Arabic-Indic) used, and then click OK.

Click Advanced Preferences, click the Creation tab, select any of the following,

Include Signature's Revocation Status When Signing Embeds information about whether your certificate is valid or has been revoked (required for signature validation).

Show Reasons When Signing Adds your reason for signing to the signature field. When you sign a PDF, a menu appears in the Sign Document dialog box from which you can select the option that best describes your reason for signing the PDF.

Show Location And Contact Information When Signing Adds your location information to the signature field. Contact information appears on the Signer tab of the Signature Properties dialog box. When you sign a PDF, text boxes appear in the Sign Document dialog box where you can type this information.

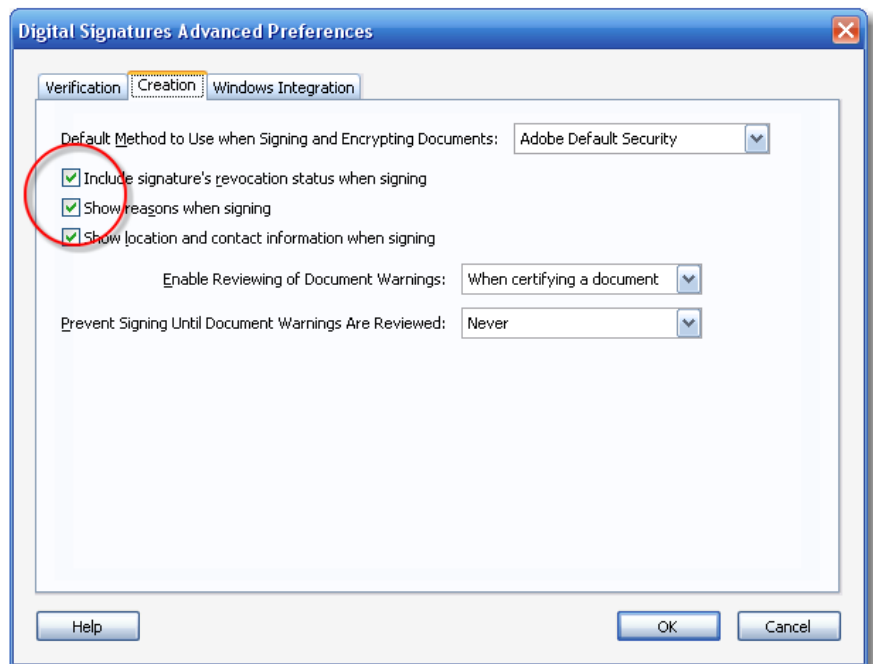
Enable Reviewing Of Document Warnings Analyzes documents in a signing workflow for content that might change the document appearance and then provides an option in the Sign Document dialog box to review this content. Specify Always, Never, or When Certifying A Document. Available options depend on the Prevent Signing Until Document Warning Are Reviewed setting.

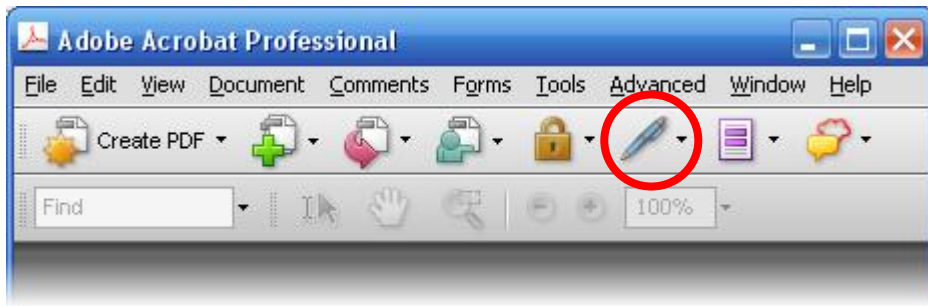
Prevent Signing Until Document Warnings Are Reviewed Enable this option to require the signer to review document warnings before signing or certifying a document. Specify Always, Never, or When Certifying A Document.

To edit or delete a signature appearance, select it in the Appearance box, and then click Edit or Delete.

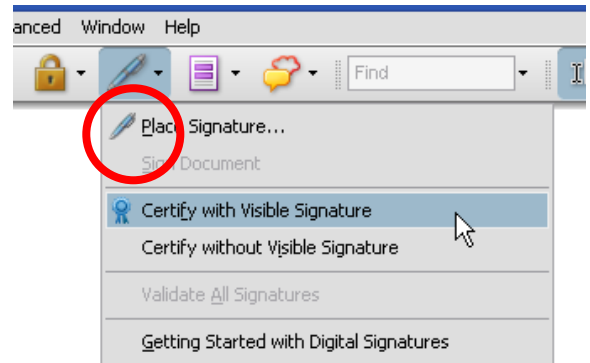
5.2. Signing your PDF

Use a digital signature to indicate your approval. For best results, change your security preferences to always sign in Preview Document mode, so that you can view and sign the PDF in a secure state.





1. Click the signature field. Or, click Sign and choose Sign Document.
2. If you wish to place a signature on a document then click on 'Place Signature'
3. If you wish to 'certify' the document then choose 'Certify' with either a visible or non visible signature as highlighted opposite.
4. Follow the on-screen instructions to apply your digital signature.



You can sign a PDF to indicate your approval. A PDF can be signed more than once and by more than one person. When you sign a document, your digital signature appears in the signature field. The appearance of the signature depends on options you choose. The actual information for your digital signature is embedded in the PDF.

As an example document flow, the original document could have been counter signed by several parties in alternative organizations as part of an approval process.



(1) Certified – The author of the document certifies the document and creates additional signature/approval fields for other parties.

Distribution – All relying parties can see the details of each signature applied.

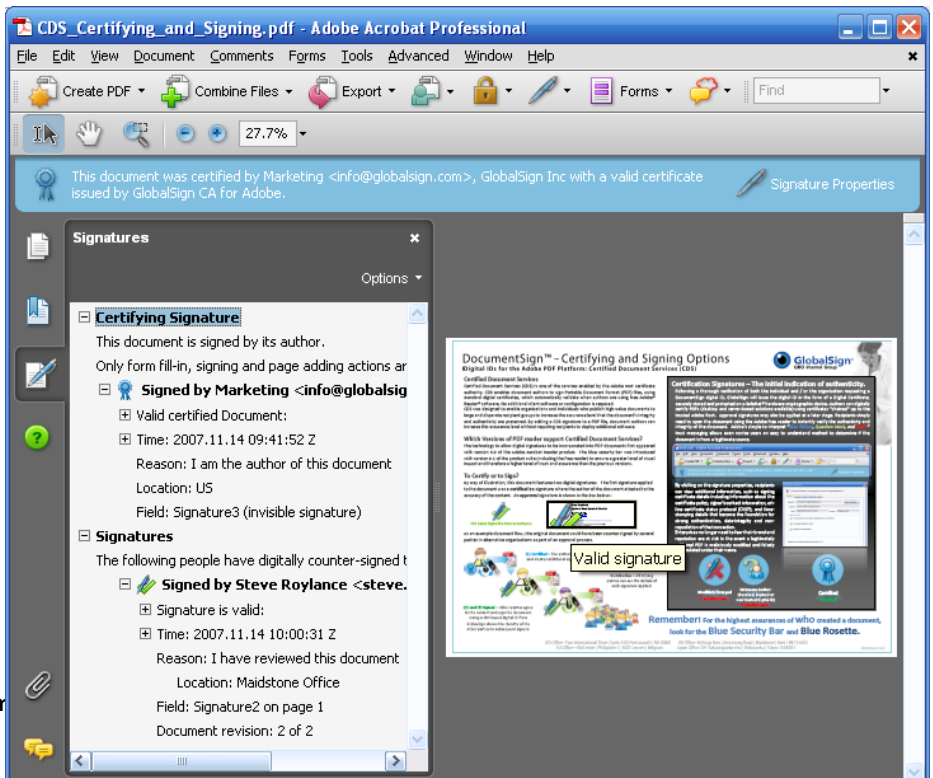
(2) and (3) Signed – Other parties agree to the content and sign the document. Using a CDS based digital ID from GlobalSign shows the identity of the other parties to subsequent signers.

An example document with certification and approval signatures is located here:-

http://www.globalsign.com/resources/CDS_Certifying_and_Signing.pdf

The first person to sign a document (typically the document author) has the option of adding a certifying signature, which allows one to restrict changes to the document.

The information about when each signature was applied including the certifying signature is



Docum

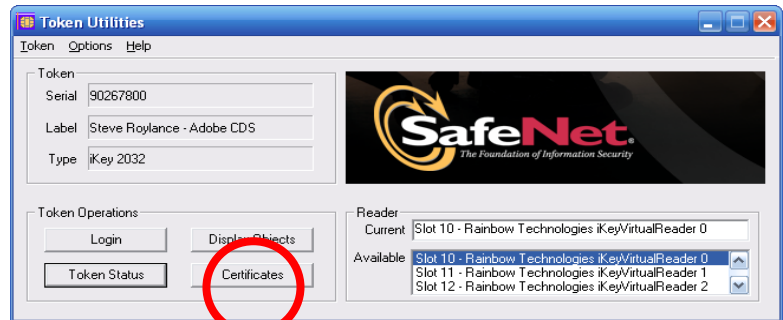
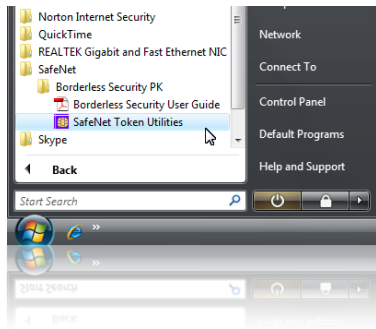
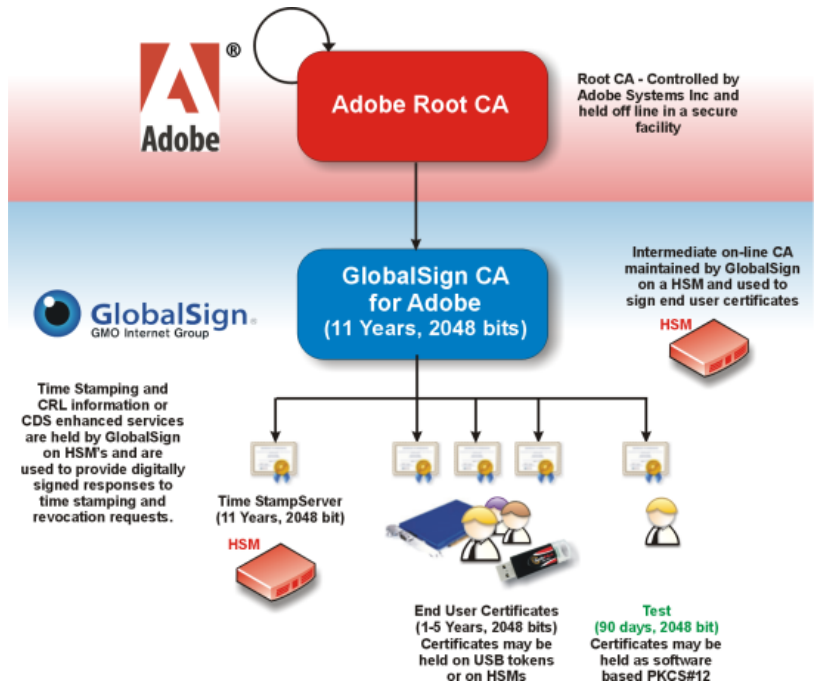
6. Error Messages

6.1. Intermediate certificates.

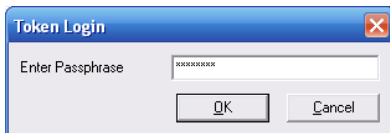
Your iKey token will be delivered with the following certificates pre-installed, however in order to be compatible with all situations for signatures to be applied across all versions of Adobe Acrobat it is recommended that you copy the first two into your certificate store:-

- Adobe Root CA
- GlobalSign CA for Adobe
- Your Digital ID.

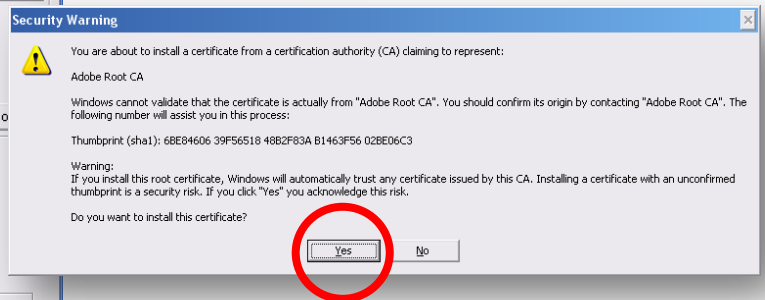
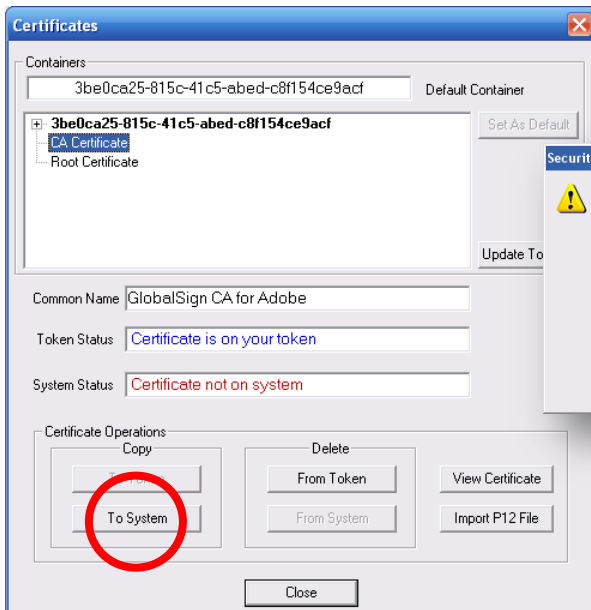
To do this locate the SafeNet Token utilities from your start menu.



Then click on the 'Certificates' Button and enter the appropriate pass phrase to authenticate your self to the token.



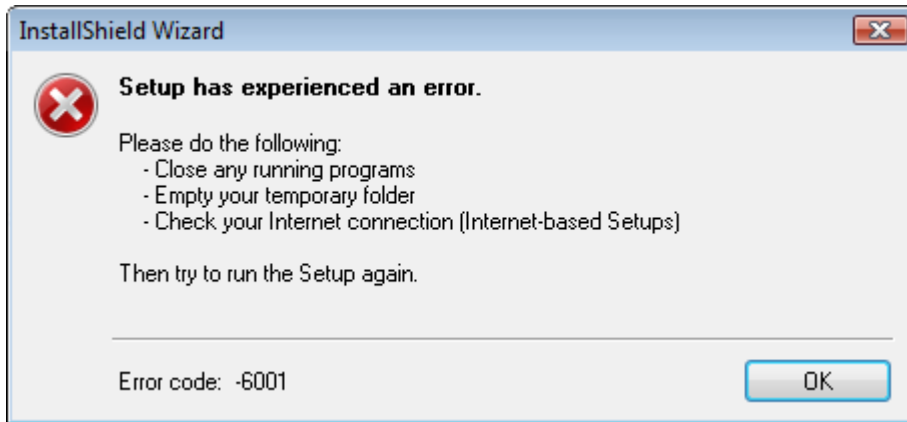
Click on the CA certificate and the on the 'To System' button



Also click on the Root Certificate and 'To System' button. Adding the Root will display a warning which is OK to say yes.

6.2. Error code 6001

During the installation process you may encounter the following Error.



This may be Please note that previous programs you have installed may also have used InstallShield and therefore may require temporary files to be removed.

To correct the problem, please delete the following directories.

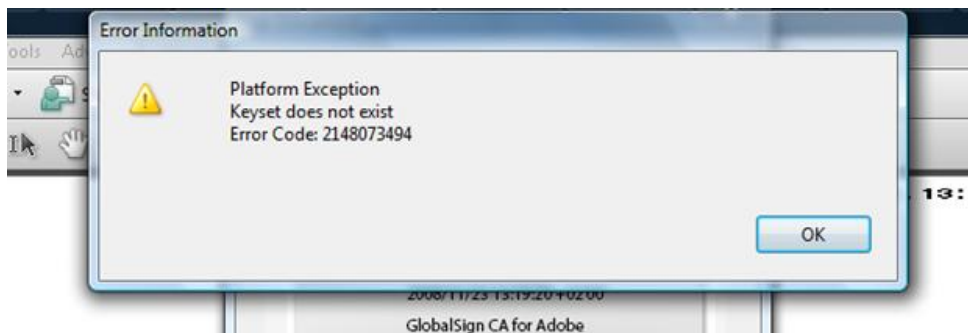
`C:\Program Files\Common Files\InstallShield\Professional\RunTime\10`

and/or

`C:\Program Files\Common Files\InstallShield\Professional\RunTime\11`

6.3. Platform Exceptions

One of the most common Error messages on the Vista Platform is Error Code 2148073494. This error code is seen when an incorrect password is entered to authenticate the user to the token. Please check your password by opening up a browser window, word document or notepad session and ensuring that you are correctly typing your password. Sometime CAPS Lock or NUM Lock or even an incorrect language setting on the keyboard could mean different characters are typed to the ones you may be expecting. Please note that 10 incorrect password entries will disable the token.



Example platform exception message.

6.4. Unknown Error

Trying to install the 32bit token drivers on to a 64bit operating system will cause a software error during installation with an 'Unknown Error' message. Please ensure you select the correct drivers for your operating system.

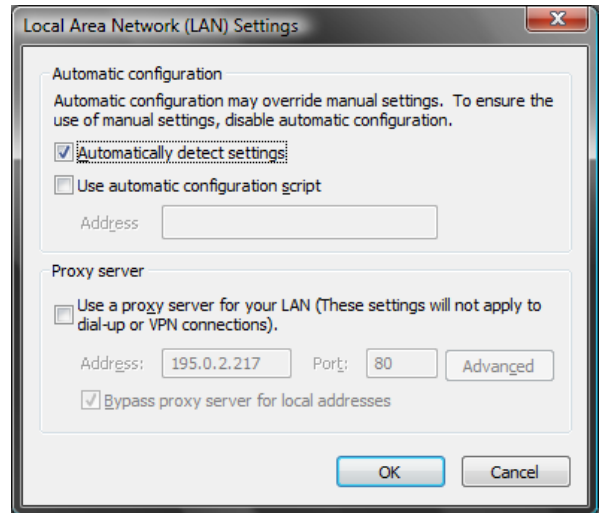
www.globalsign.com/support/adobe/tokendriver.exe (for 32 bit operating systems)

www.globalsign.com/support/adobe/tokendriver64.exe (for 64 bit operating systems)

6.5. Cannot access the Time Stamping Service

Adobe utilizes the underlying capabilities of the system to access the time stamping server. Ensure that Local Area network settings are set to Automatically detect settings.

This can be accessed either through Adobe (via the Edit, Preferences, Internet menu) or via Internet Explorer, (Tools, Options, Connections, LAN settings)



6.6. Potential Issues when signing – Points to remember:-

This information is only applicable to Version 8.XX of Adobe Acrobat. For more complete details please the online help which accompanied your product.

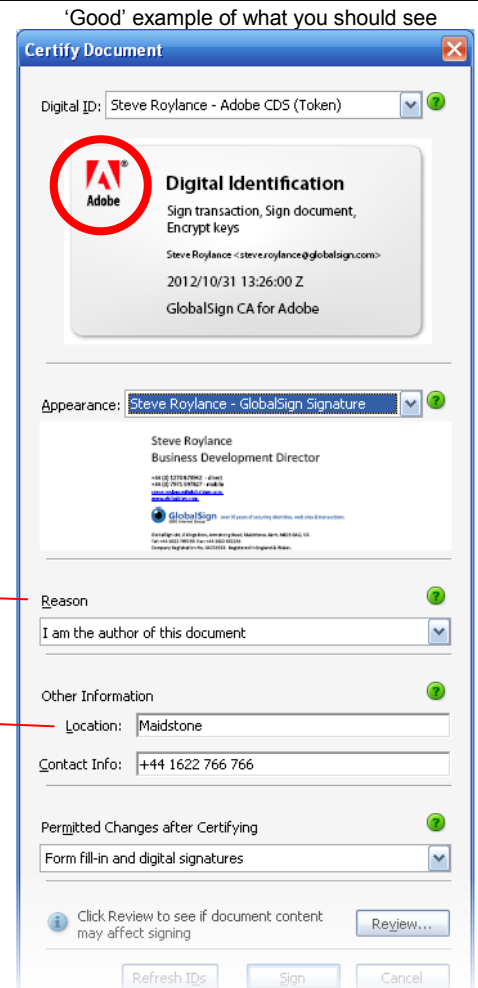
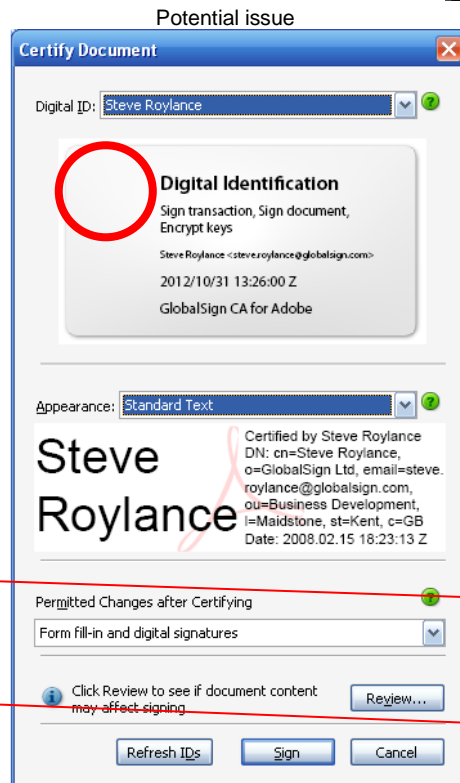
Issue -The wrong Digital ID
Answer - You may have several different digital IDs. Please use the drop down box to select the correct ID which will reveal an 'Adobe' symbol.

Issue -Missing Intermediate in your certificate store.
Answer – If the correct digital ID is chosen and you still do not see an adobe symbol, please install the intermediate and root CAs as shown in the error 6.1

Issue -Missing Appearance Profile
Answer – See Section 5.1 on how to create an appearance profile

Issue -Missing 'Reason'
Answer - See Section 5.1 on how to add the 'Reason' to a signature.

Issue -Missing 'Location'
Answer - See Section 5.1 on how to add the 'Location' to a signature.



6.7. Other questions?

Please see the adobe FAQ at <http://www.globalsign.com/adobe-cds/faq.htm> for additional information