GlobalSign Enterprise Solutions

BlueBeam® PDF Signing User Guide

PDF Signing Certificates for BlueBeam® Revu®





Table of Contents

Table of Contents	2
Introduction	3
GlobalSign Certificates	3
Step 1 – Establishing an EPKI Account	3
Step 2 – Registering Users for PDF Signing Certificates	8
Step 3 – Installing Your Certificate	13
Your Certificate as a Digital ID in BlueBeam® Revu®	13
Using Your Certificate in BlueBeam® Revu®	14
Appendix A: Purchasing Individual PDF Signing Certificates	17
Appendix B: Applying and Customizing Digital Signatures	24
GlobalSign Contact Information	24

Introduction

Using PDF signing to certify and add approval signatures to electronic document workflows offers the same assurance of origin and integrity as a wet ink signature. PDF Signing can be used by an individual as well as an entire Enterprise to assure the recipient that the document is authentic, comes from a verified source, and has not been tampered with. This is seen across multiple verticals including architecture, engineering, and construction.

To add a digital signature to a PDF document a PDF signing application is required. These applications range from simple online solutions to desktop solutions which allow you to create, edit, collaborate on, and sign PDF documents. This solution guide has been created to demonstrate the purchasing and configuration of GlobalSign's PDF Signing Certificates with the PDF signing application BlueBeam Revu.

GlobalSign Certificates

As a member of both Adobe's Certified Document Services (CDS) and Approved Trust List (AATL) GlobalSign's PDF Signing certificates are compatible with all versions of BlueBeam[®] Revu[®]. The type of certificate license you will require will depend on the number of users and volume of PDF documents which will require signatures. This guide will cover both scenarios outlined below:

- **Individual**: ideal for an individual with the need to sign PDFs (<2,000 signatures per year). If this is the solution you are looking for please proceed to <u>Appendix A</u>: <u>Purchasing Individual PDF Signing Certificates</u>.
- Enterprise PKI (EPKI): ideal for organizations with multiple individuals with the need to sign PDFs and have the added benefit of managing all certificates in a central location. This centralizes lifecycle management including issuing, renewing, revoking, and reissuing. If this is the solution you are looking for please proceed to the next step, Step 1 Establishing an EPKI Account.

Step 1 - Establishing an EPKI Account

If you do not already have a GlobalSign EPKI Account, you will need to register for an EPKI account and setup a Certificate Profile. A Certificate Profile will serve as a pre-vetted organization template containing the organization's identity records (such as organization name, city, state, etc.) that end user certificate requests will be issued from. Verifying the organization's identity associated with a profile typically takes between 2 and 3 business days.

If you already have an EPKI Account, please proceed to Step 2- Registering Users for PDF Signing Certificates.

If you do not already have an EPKI Account, please follow the instructions below:

1. Navigate to https://www.globalsign.com/pdf-signing/. Click **How To Buy**.



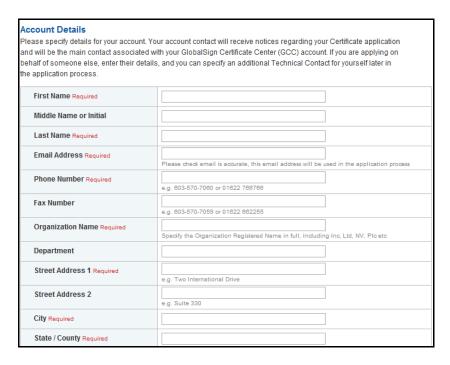
2. Click **Select** under the Desktop Enterprise Level option.



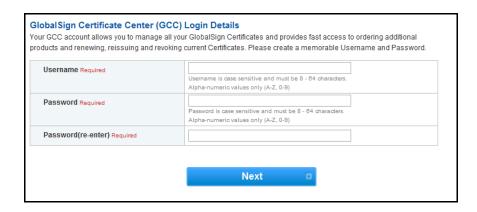
3. If you require a license pack for five certificates you can purchase it by clicking **Select** under the 5 License Pack option and complete the purchasing process. For the purposes of this guide it is assumed you require more than five certificates. Click on **Get Quote** under the Need More? Option. An account representative will be in contact with you shortly to help you decide the best options for your EPKI account. The next step will be to register for an EPKI account.



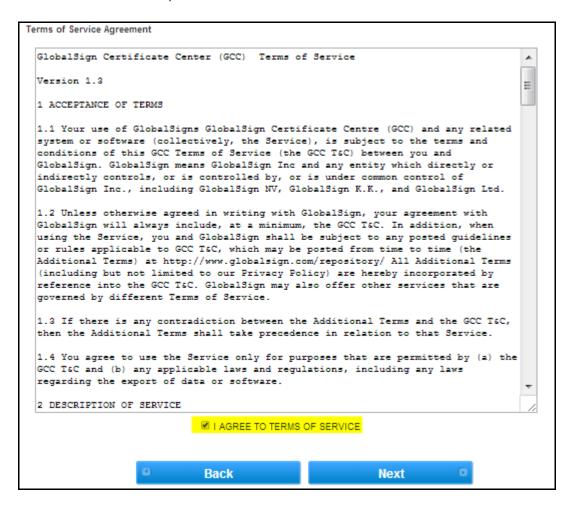
4. Register for an EPKI account by entering your account details. Note: this is not the vetted profile information.



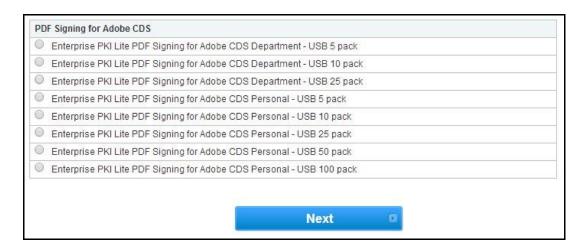
5. Choose a username and password. An account number (PAR####) will be appended to the username you choose. Click **Next** to continue.



6. Confirm your account information and review the Terms of Service Agreement. Be sure to double check that all information is entered correctly. Click **Next** to continue.

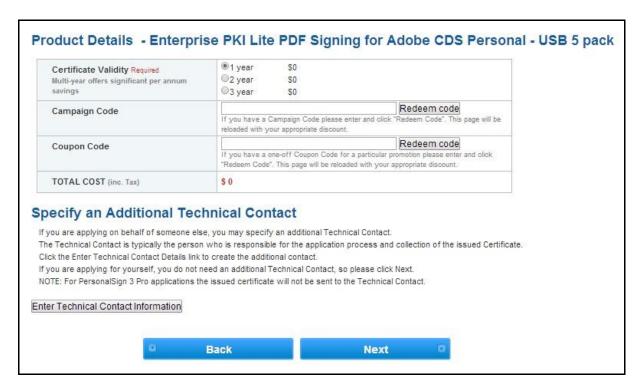


7. Choose the license pack size of Identity Certificates you wish to purchase. Click **Next**.



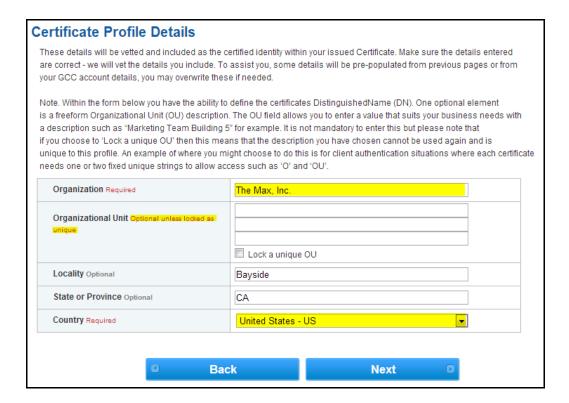
8. Choose a validity period to be applied to your license pack (1-3 years).

Optional - Add an additional technical contact (this is commonly used when you are applying on behalf of someone else). Click **Next** to complete.

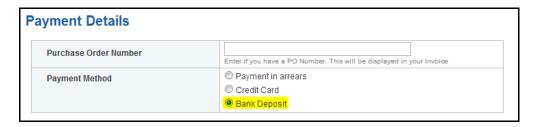


9. Enter the Certificate Profile Details. These details will be vetted and included as the certified identity within your issued certificates. Click **Next** to continue.

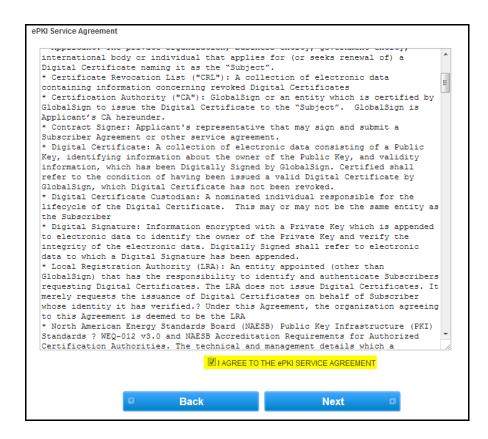
Important - make sure the details entered are correct as GlobalSign will vet the details you include.



10. Complete the payment details.



11. Confirm your order details. Review and agree to the EPKI Service Agreement. Click **Next** when finished.



12. The next screen will display your username and information about your profile. Save this information for your records.



Once you have successfully created an EPKI account, your information will be sent to our vetting team. Vetting your organization details can take **up to 2-3 business days**. Once the vetting process is complete, you will receive an email notifying you of its completion.

Once your EPKI account is setup and established, please continue to Step 2 - Registering Users for PDF Signing Certificates.

Step 2 - Registering Users for PDF Signing Certificates

There are three options that the EPKI Administrator can use to "invite" users to apply for pre-approved digital certificates:

- Single New Certificate (Order Certificates)
- Multiple New Certificate BULK (Order Certificate BULK)

The following steps will walk you through the single invite process using the Order Certificates function. If you are looking to invite multiple users please refer to the instructions found in the EPKI Administrator Guide: https://www.globalsign.com/support/ordering-guides/globalsign-epki-admin-guide.pdf

- 1. Login to your GlobalSign Certificate Center (GCC) account at www.globalsign.com/login/.
- 2. Select the "Enterprise PKI" tab found on the top menu bar.

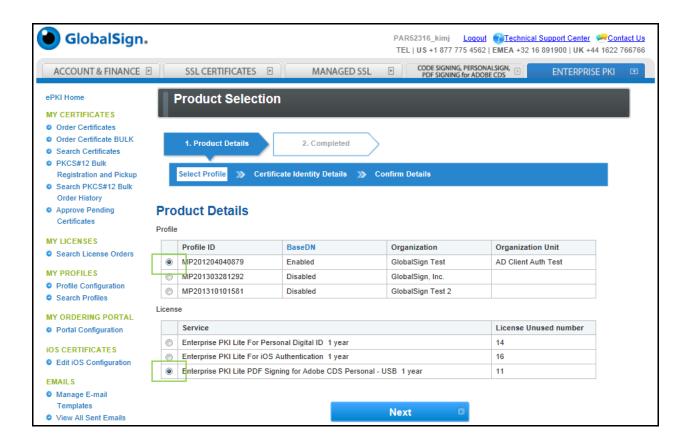


Please note: if this is your first time logging in your menu options will be limited. For first time users, you will need to enroll for an "EPKI Administrator Certificate", which is an authentication certificate needed to access secure areas of GCC such as the Certificate Management section. Please follow the steps below to enroll for your administrator certificate.

- a. Click the Get EPKI Administrator Certificate link in the left hand menu to start the enrollment process.
- b. Follow the prompted steps to enroll and install your certificate.
- If you need further assistance and detailed instructions on how to enroll for your EPKI Administrator
 Certificate, please see our administrator guide located at
 https://www.globalsign.com/support/ordering-guides/globalsign-epki-admin-guide.pdf
- 3. In the left hand menu, select **Order Certificates** under My Certificates.

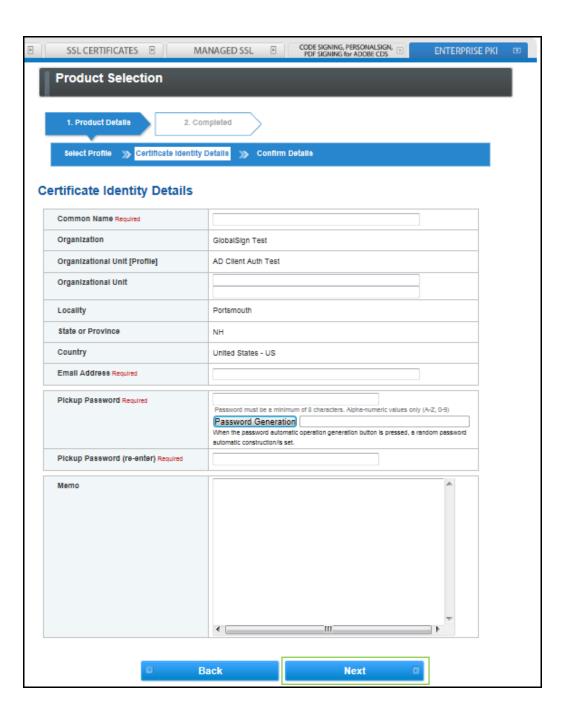


4. Next, select the **Profile** and **License** pack that you want to issue the certificate from. In most cases there will be only one option for each area. Click **Next**.

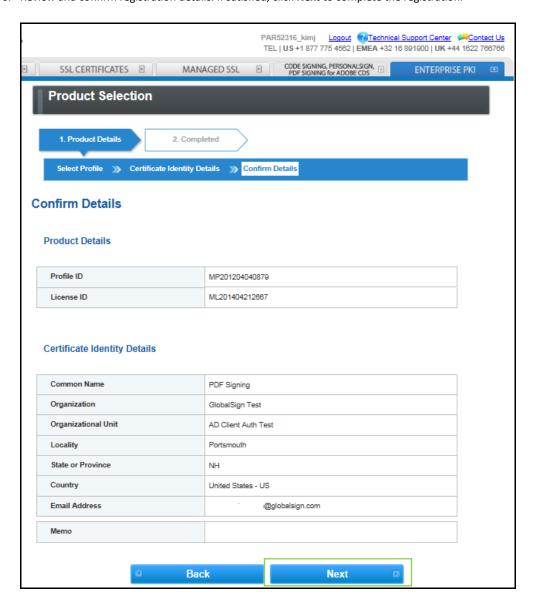


- 5. Next, complete the **Certificate Identity Details**.
 - Provide the end-user identity details.
 - a. **Important -** Establish a one-time Pickup Password. **The user will need this password to install** the certificate onto their device; you must deliver this Pickup Password in an out-of-band method.
 - b. **Optional** enter a reason or note associated with the registration. This note will appear in the Order History section of EPKI and may be useful for audit purposes.

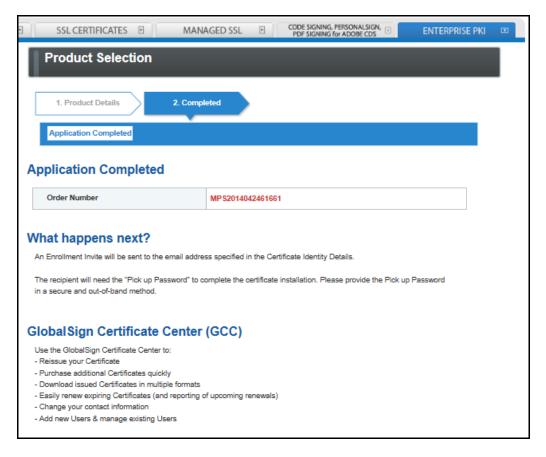
Click Next to continue.



6. Review and confirm registration details. If satisfied, click **Next** to complete the registration.



The registration is now complete and as indicated the Enrollment Invite will be sent to the email address specified in the Certificate Identity Details. Please continue to Step 3 - Installing Your Certificate to see how the user will complete the certificate pick-up and installation.



Step 3 - Installing Your Certificate

Now that you have issued a PDF Signing Certificate it will need to be installed on a USB token. GlobalSign has standardized on offering SafeNet iKey USB tokens which will be shipped to you once the vetting process has been completed.

Once you receive the tokens you will need to take the following steps to complete the installation:

- Install the GlobalSign SafeNet Utility Drivers
- Initialize the USB token and set your USB token password
- Install the GlobalSign certificate on the USB token

Note the certificate must be installed within thirty (30) days from the date the order was placed.

For detailed instructions on the steps outlined above please review the GlobalSign PDF Signing Certificates Installation Support guide: https://www.globalsign.com/resources/installation-guide/pdf-signing-installation-guide.pdf

Once you have successfully installed the certificate onto your USB token please proceed to <u>Your Certificate as a Digital ID</u> <u>in BlueBeam® Revu</u>.

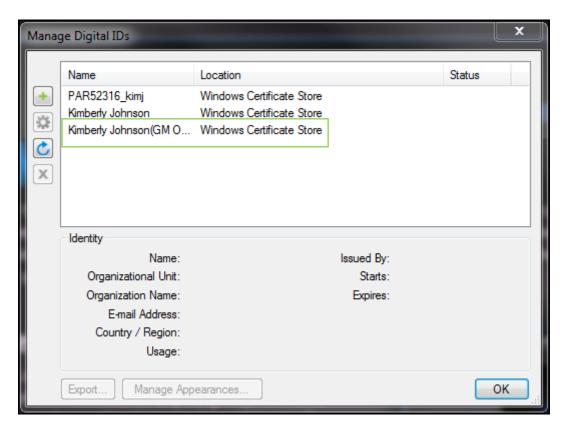
Your Certificate as a Digital ID in BlueBeam® Revu®

With locally stored digital certificates you would typically be required to create a new digital ID within BlueBeam Revu, however with GlobalSign's PDF Signing Certificate on a USB token, the certificate automatically displays as an available digital ID once plugged into the computer.

To view your Digital IDs you will need to navigate to the Manage Digital IDs dialog by selecting **Document > Signatures** Digital IDs...



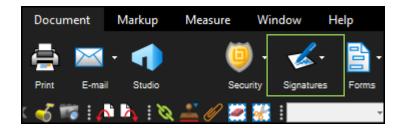
2. Once in the Manage Digital IDs dialog you will see your PDF Signing Certificate displayed as an available digital ID.



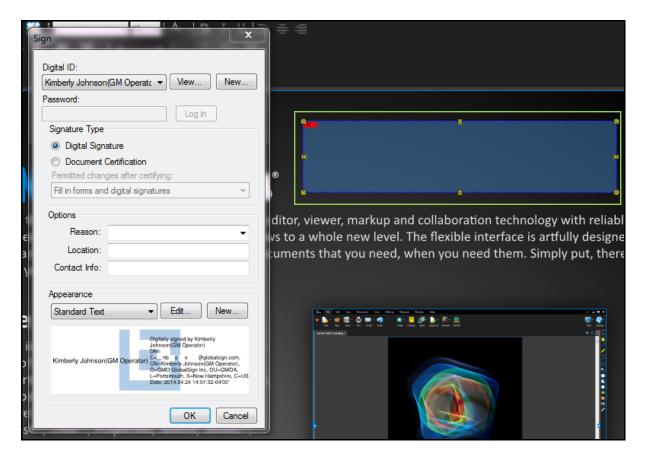
Using Your Certificate in BlueBeam® Revu®

There are many different signature combinations and types within BlueBeam® Revu®. The following steps are to show a basic signing of a PDF document so that you can understand the process of using a GlobalSign PDF Signing Certificate. For all other signature scenarios please refer to the available BlueBeam® documentation and support page: http://www.bluebeam.com/us/support/.

1. With a PDF document open select **Document** and from the **Signatures** drop down menu select **Sign Document**.

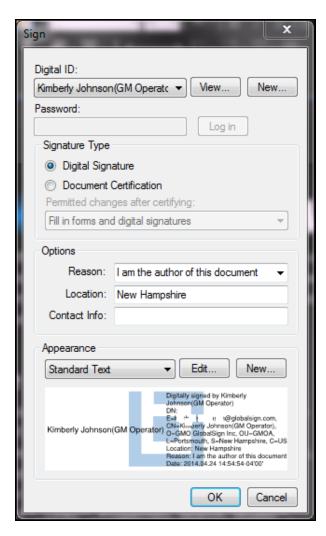


2. Use the cursor to draw the signature area on the document. Once the signature area is defined the **Sign** dialog will appear.

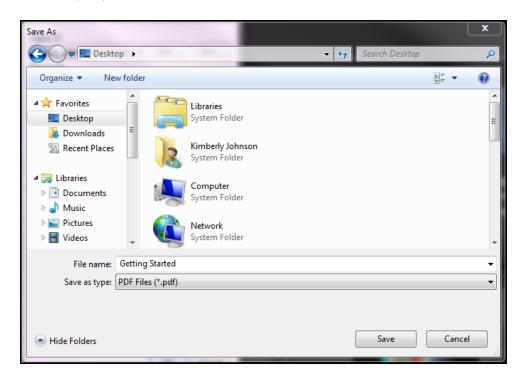


3. With the Sign dialog open use the **Digital ID** drop down to select your GlobalSign PDF Signing certificate. Select the **Signature Type**, fill in any options and adjust the Appearance as required. Click **OK** to continue.

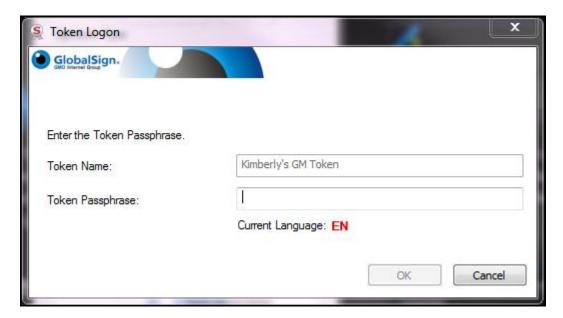
For further information on how to customize the appearance of your signatures please review **Appendix B: Applying** and Customizing Digital Signatures.



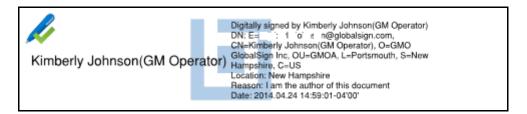
4. You will be prompted to save the PDF. Choose the desired location and click Save.



5. The Token Logon will appear for your USB token. Enter the Token Passphrase and click OK.



6. You have now signed the PDF document and your signature appears in the designated signature area.



Appendix A: Purchasing Individual PDF Signing Certificates

The type of certificate license you will require will depend on the number of users and volume of PDF documents which will require signatures. This section is to explain the ordering process for individuals with the need to sign PDFs (<2,000 signatures per year). If you are looking for a greater volume of certificates please review the section on GlobalSign Certificates.

1. Navigate to https://www.globalsign.com/pdf-signing/. Click **How To Buy**.



2. Click **Select** under the Desktop Individual Level option.



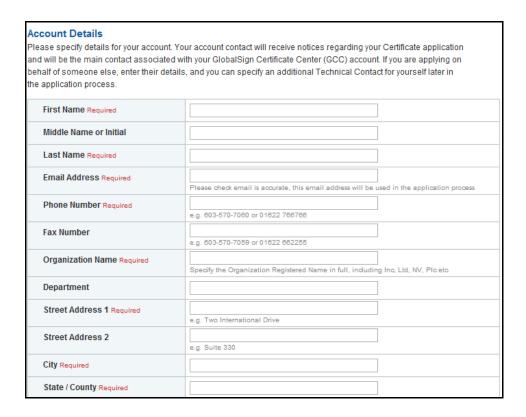
3. Select your region from the dropdown menu and click **Select and Continue**.



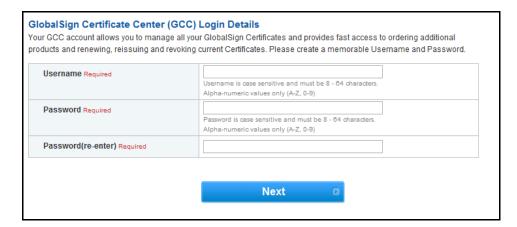
4. Select the product from the following options. It is recommended for most individuals to purchase the Medium Volume license pack for up to 2,000 signatures per year. Once you have selected your product click **Select and Continue**.



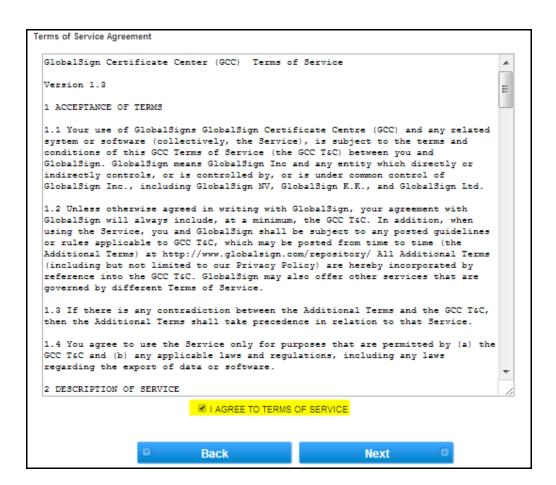
5. Your order will then be processed and the **Certificate Application** will appear. Complete all required information of the application and click **Next**. *Note: this is not the vetted certificate information*.



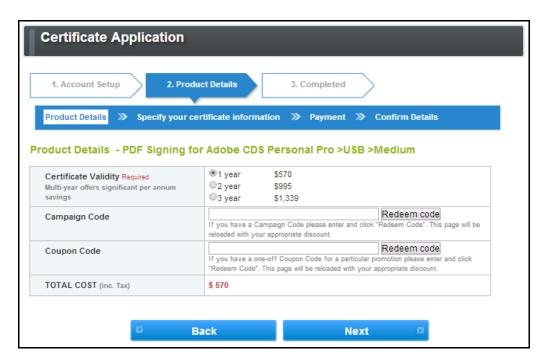
You will also need to choose a username and password. An account number (PAR####) will be appended to the username you choose. Click **Next** to continue.



6. Confirm your account information and review the Terms of Service Agreement. Be sure to double check that all information is entered correctly. Click **Next** to continue.



7. Choose a validity period to be applied to your license pack (1-3 years). Click Next.



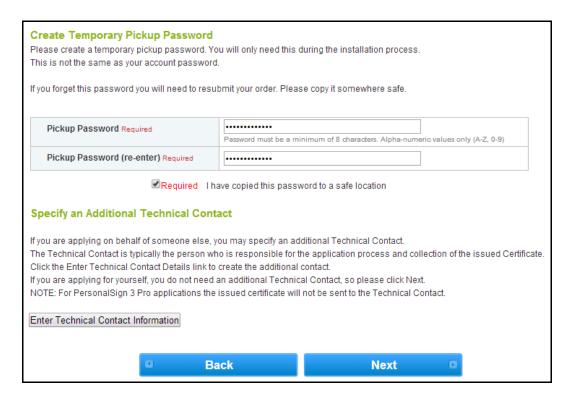
8. Next, complete the **Certificate Identity Details**. These details will be vetted and included as the certified identity within your issued certificate.

Important - make sure the details entered are correct as GlobalSign will vet the details you include.

Important - Establish a one-time Pickup Password. **You will need this password to install** the certificate onto your device. If you forget this password you will need to resubmit your order. Please copy it somewhere safe.

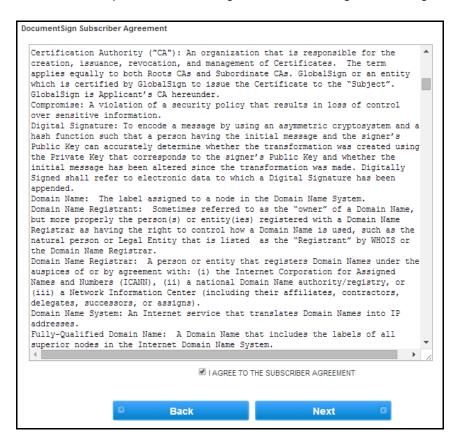
Optional - Add an additional technical contact (this is commonly used when you are applying on behalf of someone else).

Click Next to continue.



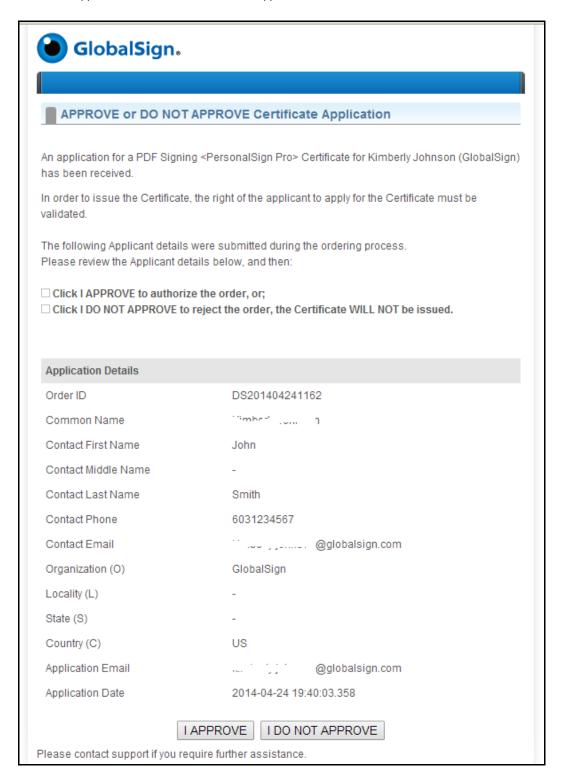
9. Complete the payment details.

10. Confirm the details you have entered and agree to the DocumentSign Subscriber Agreement. Click Next to continue.

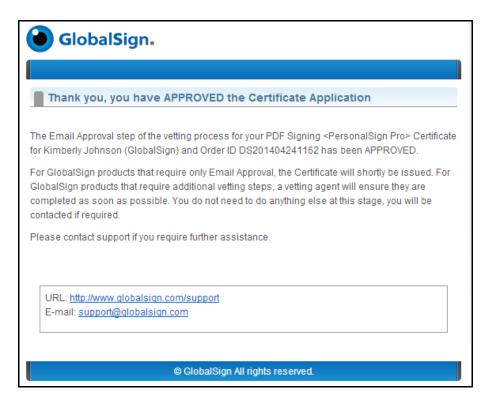


11. A confirmation email will now be sent to the email address you provided earlier. To approve the application you need to click the approval link within the approval email. Only if you approve the application will the certificate be issued.

12. Review the application details and **APPROVE** the application.



Once you have successfully ordered your PDF Signing Certificate and your application will be sent to our vetting team. Vetting your application details can take **up to 2-3 business days**. Once the vetting process is complete, you will receive an email notifying you of its completion. Once the vetting process is complete please proceed to Step 3 - Installing Your Certificate.



Appendix B: Applying and Customizing Digital Signatures

Further details on managing the appearance of signatures, adding the signature field and signing in fields can be found in the following BlueBeam Revu Tutorial: http://www.bluebeam.com/us/bluebeam-university/pdf-tutorials/revu-10/digital-signatures.pdf

GlobalSign Contact Information

GlobalSign Americas	GlobalSign EU	GlobalSign UK
Tel: 1-877-775-4562	Tel: +32 16 891900	Tel: +44 1622 766766
www.globalsign.com	www.globalsign.eu	www.globalsign.co.uk
sales-us@globalsign.com	sales@globalsign.com	sales@globalsign.com
GlobalSign FR	GlobalSign DE	GlobalSign NL
Tel: +33 1 82 88 01 24	Tel: +49 30 8878 9310	Tel: +31 20 8908021
www.globalsign.fr	www.globalsign.de	www.globalsign.nl
	verkauf@globalsign.com	verkoop@globalsign.com