



Quick Start Guide

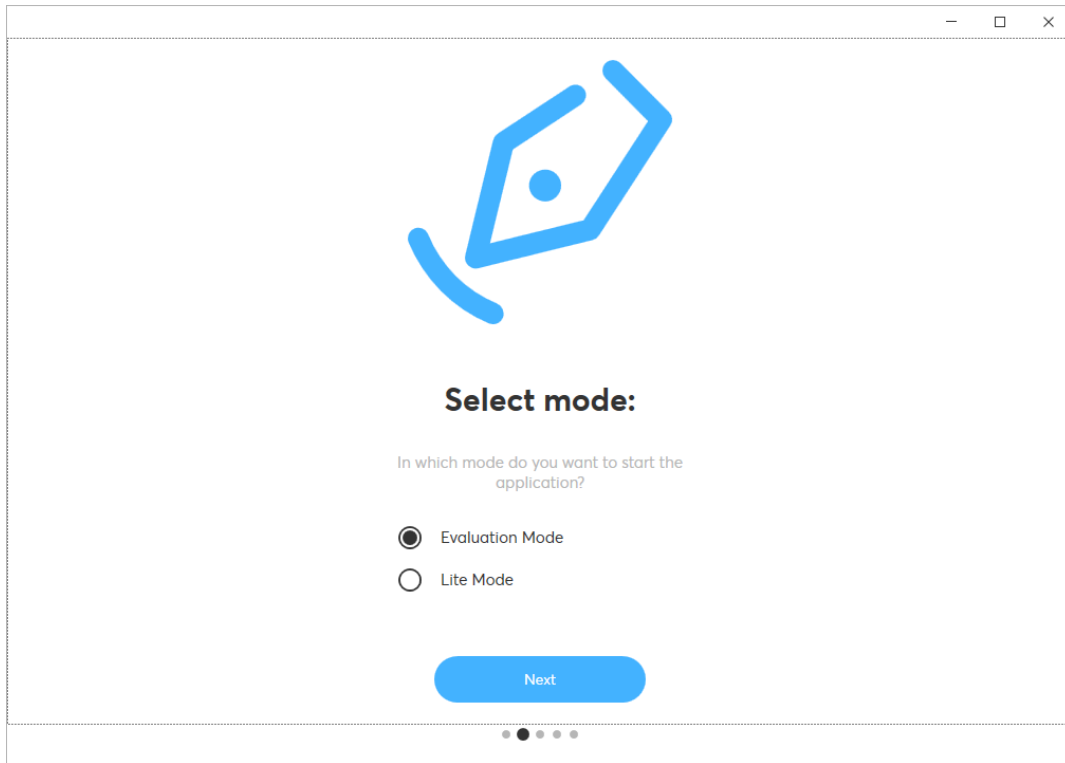
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Installation

The first time you start sign pro PDF you will need to make a number of selections, any of which you can change later on in Settings.

The first selection is the type of license to use:

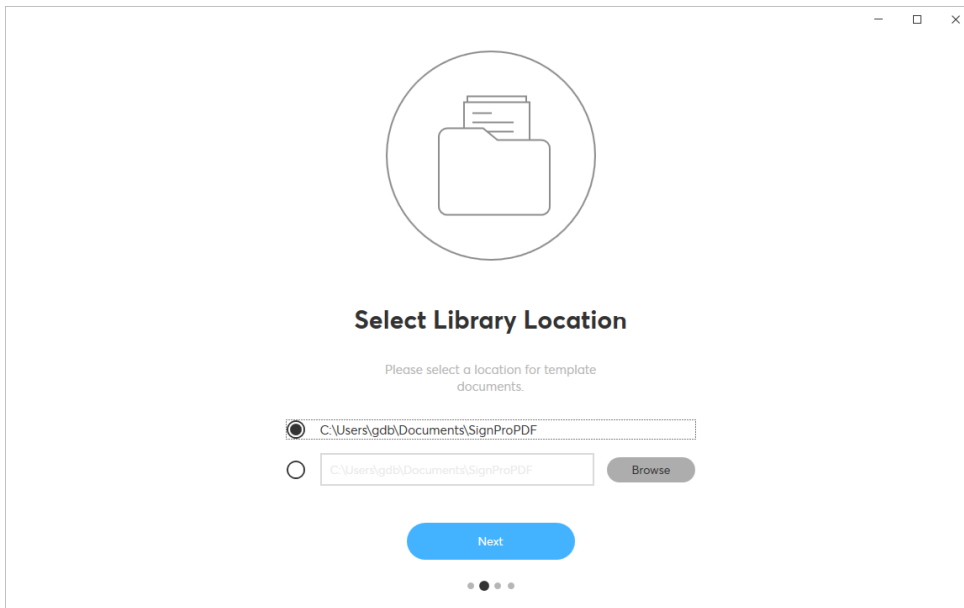


Differences between Lite and Evaluation Mode

Feature	Lite Mode	Evaluation Mode
Capture electronic signatures using Wacom devices	✓	✓
Freehand annotations on PDF documents	✓	✓
PDF form-filling using keyboard	✓	✓
PDF form-filling using handwriting recognition	✗	✓
Document and template management	✓	✓
PDF document authoring (create text fields, check boxes, date fields etc.)	✗	✓
ISO format support and signature encryption	✗	✓

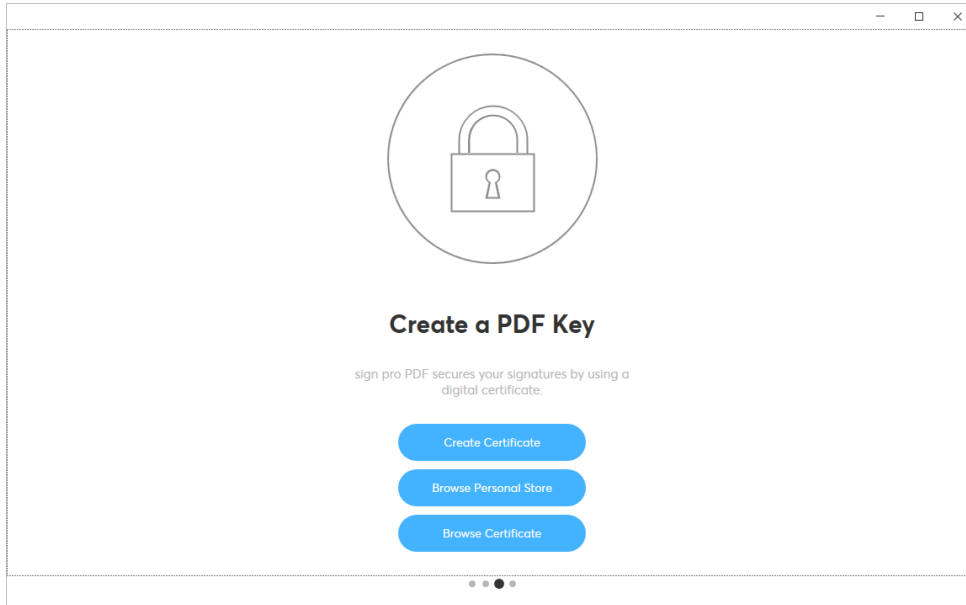
Support for most pen-enabled Windows devices	✗	✓
Evaluation watermark displayed in document	✗	✓

The next selection is the default folder used by the application:



The folder name is used as the default for Save-As operations. It is also used to save the local certificate.

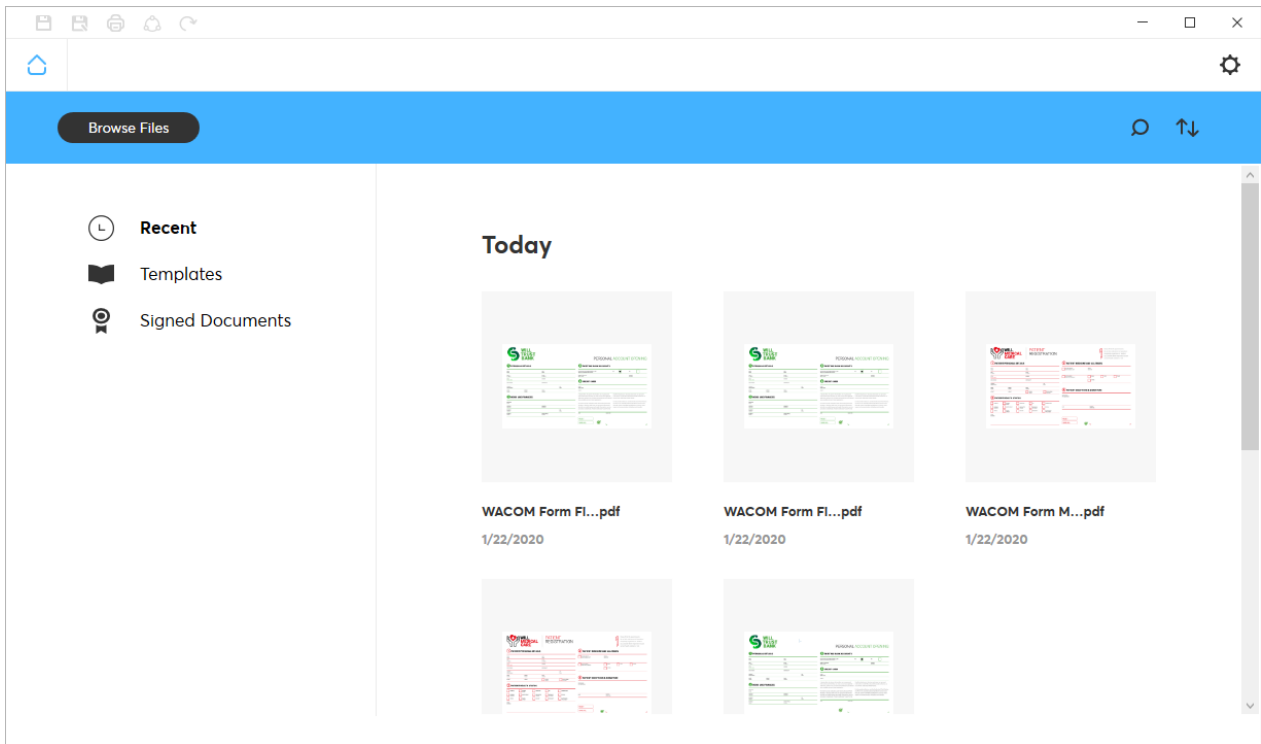
Next you will need to select a digital certificate used in the document signing process:



If you have an existing certificate use one of the browse options to read it directly from file, or from the Windows certificate store.

Alternatively allow sign pro PDF to create the certificate for you following the instructions provided. The certificate created is a so-called self-signed certificate. When a PDF document is signed using a self-signed certificate, the signer's identity cannot be verified by the recipient of a document. We recommend that you obtain a certificate (also known as a private-public key pair or a digital ID) from a certification authority if you are planning to send your signed documents to many different recipients.

Open File



Sign pro PDF displays the file access page on startup.

A standard file browse option is available.

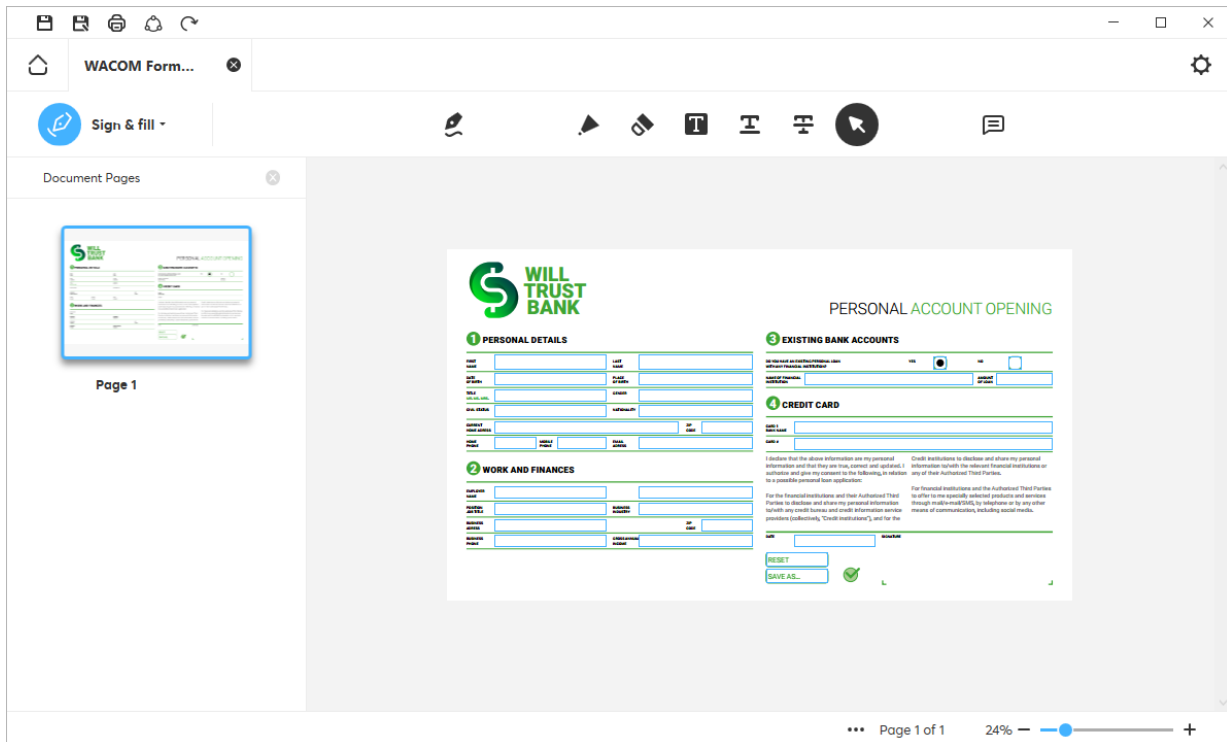
In addition, three categories of files are listed:

- Recent – PDF files recently saved
- Templates – PDF files created using the [Authoring](#) tool
- Signed Documents – PDF files signed and saved

The files are displayed as thumbnail images with search and sort commands. The file lists are maintained in a database recorded alongside application settings.

Sign & Fill

Select a file to open it. In a standard installation **Sign & Fill** is selected:



The PDF is displayed with a toolbar:



Sign:

To sign, click the tool then draw a rectangle using mouse or pen. When the rectangle is large enough a signature will be captured and displayed in the rectangle.







To sign in a signature area created using **Authoring**, click Sign then click in the signature area



Ink tool:

Click the tool to start a freehand drawing in the document. By clicking the tool a second time you can choose the ink color from a palette. Use mouse or pen to draw ink in the document.

Note that a Wacom STU signature pad pen has no control over the Windows mouse pointer and therefore cannot be used for this operation.

-  **Erase:** Use the tool to erase individual freehand ink traces drawn using the ink tool
-  **Highlighter:** Use the tool to highlight selected text (**highlight**). Drag the cursor over text to select it for highlight.
-  **Underline:** Use the tool to underline selected text (underline)
-  **Strikethrough:** Use the tool to apply strikethrough to selected text (~~strikethrough~~)
-  **Select:** Use Select to change a toolbar selection and to select a field for form filling
-  **Comment:** Use the tool to add a comment/sticky note. Click in the document where the note should appear. A popup dialog allows you to enter text for the note.

Form Filling

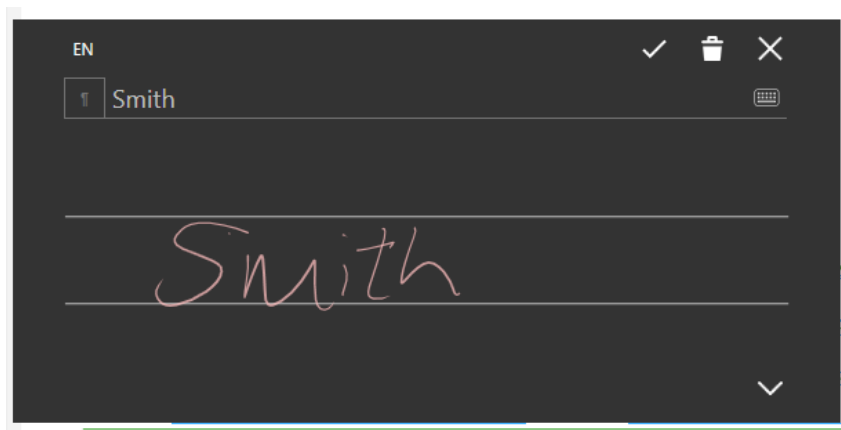
A PDF document can contain form fields from its original creation or by using [Authoring](#) mode. These field types are supported in [Sign & Fill](#):

- Check box – click to change a checkbox selection
- Radio buttons – click to toggle a radio button
- Date – click to display the date picker dialog
- Text – see below
- Signature – see below

Text field:

Click a Text field with the mouse and enter text using the keyboard.

Alternatively click the text field with a Wacom pen to display the text input dialog:



You can then use automatic handwriting recognition to enter text. If required use the keyboard tool provided to make a correction.

Note that the Wacom STU signature pad pen is not supported in this feature.

Signature field:

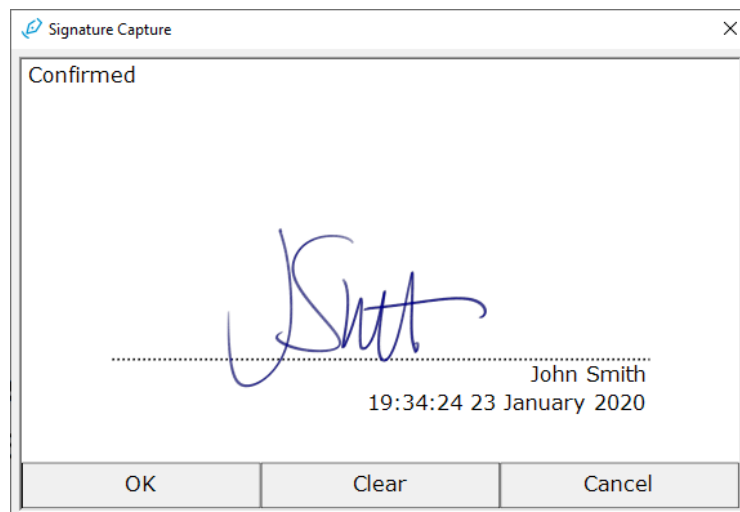
Use the Sign tool and draw a rectangle, or click a template signature field to enter a signature:

Depending on the *Manage Signature* settings you may be prompted for the signature details:



A dialog box with a light blue border. It contains two text input fields. The first is labeled "Signatory Name" and contains the text "e.g. John Smith". The second is labeled "Reason for Signing" and contains the text "e.g. Contract agreement". At the bottom, there are two buttons: "OK" and "Cancel".

Enter the required values to start signature capture:








A dialog box titled "Signature Capture" with a close button (X) in the top right corner. The main area is labeled "Confirmed" and shows a blue handwritten signature "J Smith" over a dotted line. Below the signature, the text "John Smith" and "19:34:24 23 January 2020" is displayed. At the bottom, there are three buttons: "OK", "Clear", and "Cancel".

Sign using a pen and press OK on completion. Use the Clear button to sign again if required.

File menu

On completion use one of the file menu options:



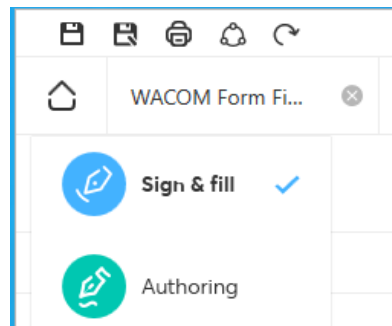
-  **Save:** Replace the open file.
-  **Save As:** Save the file in a specified folder and filename.
-  **Print:** Print the file.
-  **Share:** Send the file by email.
-  **Rotate:** Rotate the document display.

Authoring

Mode Selection

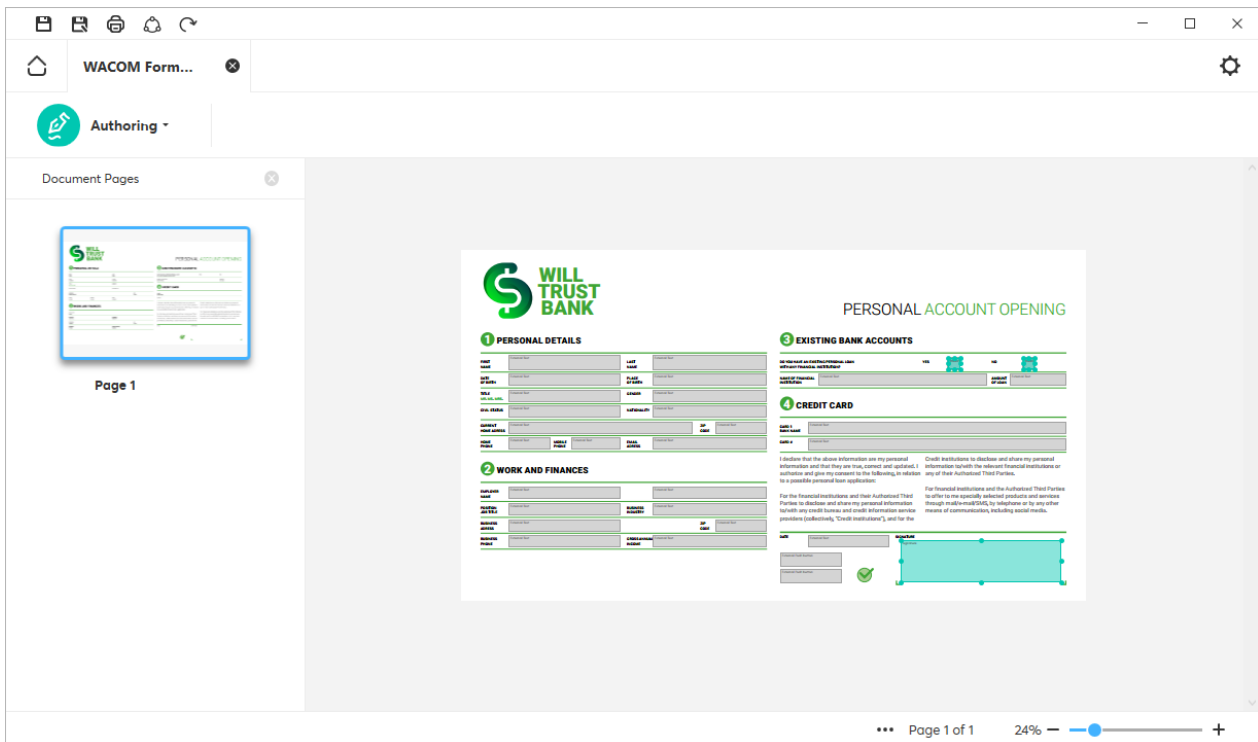
In a standard installation **Sign & Fill** will be selected.
To select **Authoring** mode a suitable license is required, see *Settings...About*.

Use **Switch mode** to change to **Authoring**:



Alternatively, use *Settings...General* to change the default mode to **Authoring**.

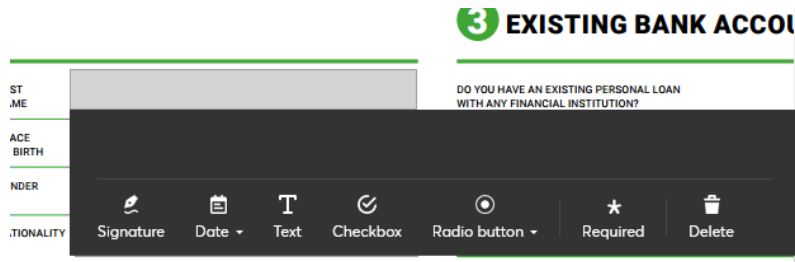
Open a file to start **Authoring**:



Create fields

You can now add and modify fields in the document.

Draw a rectangle with the mouse or pen cursor to create a field:



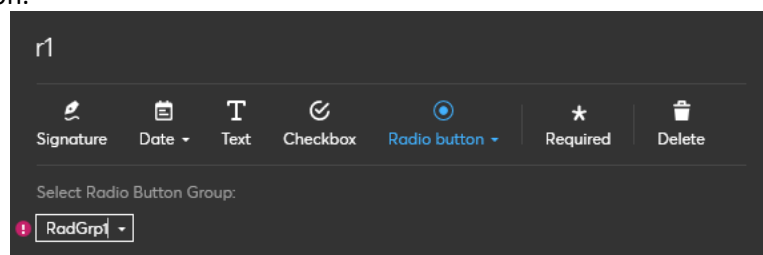
Signature: Define a unique name for the Signature field.

Date: Define a unique name for the Date field and select the required format.

Text: Define a unique name for the Text field and select single or multiline format.

Checkbox: Define a unique name for the Checkbox field.

Radio button: Define a unique name for the Radio button field. The button must be assigned to a group name, defined in the dialog. initially 'New group' is displayed and should be edited. Additional radio buttons allow the name to be chosen in the drop down selection.

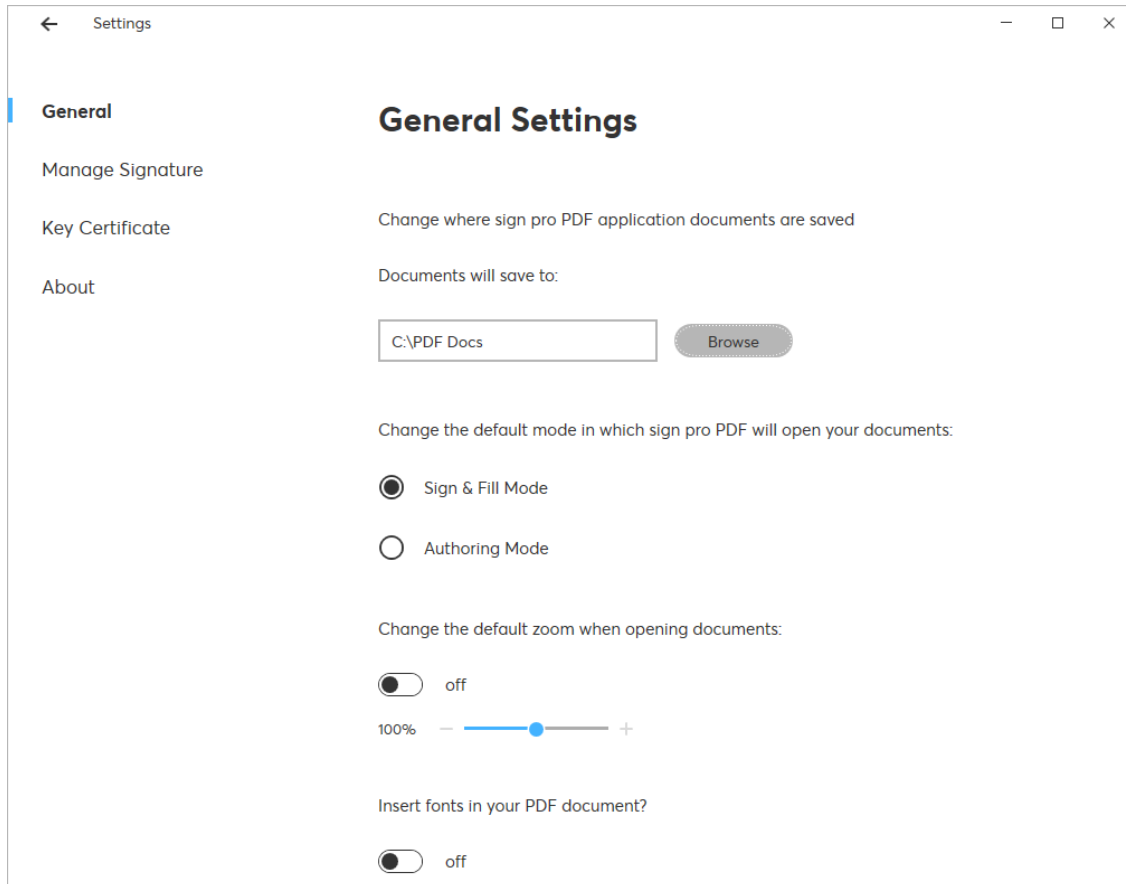


Required: When selected the field will be shown as required with an asterisk *

Delete: Use the option to delete a field.

Change the size and location of the field by dragging the field sizing handles.
Right-click an existing field to edit its definition.

Settings



General

Default folder:

Specifies the default folder used for Save-As.

Default mode:

The default operating mode can be changed if a suitable license is installed:

- [Sign & Fill](#)
- [Authoring](#)

Default zoom:

Turn On to select a default zoom level.

Insert fonts:

Turn On to allow fonts to be embedded in the saved PDF file.

The use of non-Latin characters in form fields requires embedded fonts.

Turn the option Off to reduce the size of the saved file but with reduced support for non-Latin characters.

Turning Off the option will not remove embedded fonts from an existing file.

Manage Signature

Default signature type:

- FSS: (Forensic Signature Store) Signatures saved in the Wacom proprietary signature format can be used in supporting applications such as SignatureScope and Dynamic Signature Verification
- ISO: Signatures saved in the ISO standard signature format can be exported to third party applications that also recognise the standard

In both formats signatures are saved with pen data and signature information including Signatory Name and Reason for signing.

Document certification:

To prevent changes being made to a document after it has been signed you should select the option to make the first signature certify the document. In addition you can select one of the options:

- Allow form filling, signing and commenting
- Allow form filling and signing only
- Do not allow any changes to the document

Use default signatory data:

In the Off position adding new signatures will prompt for:

- Signatory name
- Reason for signing

In the On position preset values will be used, and you can edit these values using 'Change signatory data'.

Encryption:

Enable encryption to add an additional level of security to the signature data saved in the document.

To use the option you must specify the digital certificate to be used for encryption. The certificate key will be needed by the document recipient to extract the signature data.

Normally the certificate will be supplied by a third party as a .CER file, containing information about the owner and the public key.

To use a self-signed .P12 certificate generated by sign pro PDF, open it in the Windows Certificate Manager tool (Certmgr.msc) then export it as a .CER file.

Key Certificate

Use the settings page to specify the digital certificate used in the document signing process.
Use Create New to create a new certificate, following the instructions provided.
Use Browse File to select a key file.

Use Browse Personal Store to select a key saved in the Windows certificate store. You can view existing personal certificates by running the Windows Certificate Manager tool (Certmgr.msc).

About

The settings page displays version information.

Use the Upgrade option to install a license. An upgrade license is needed to operate **Authoring** mode. Paste the supplied license in the field or browse to the file containing the license text:

Update Licences

Please enter valid product licence key or select one of the modes below.

Select mode:

Full Mode

Evaluation Mode

Lite Mode

eyJhbGciOiJSUzUxMiIsInR5cCI6IkpXVCJ9.eyJpc3MiOiI3YmM5Y2IyYWIxMGE0NmUxODI2N2E5MTJkYTA2ZTI3NiIsImV4cCI6IjE0MzQ0MzY0NywidWF

Browse ✓ Full Mode

Save Cancel

Further Information

For further information please see the online sections here: [sign pro PDF version 4 FAQs](#)