### **Vtria** [Lotus Notes Tools]

## QUICK ST⊵RT GUIDE



Your Notes signature nightmares are over. Ytria signEZ gives you

complete control over database signing. It allows you to: delegate signatures to other users; sign using stored IDs; audit signatures; and batch sign multiple databases. And signEZ does all this without circumventing Notes security. Ytria signEZ lets you quickly sign or audit signatures for multiple documents. Here's how:

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**1.1** Choose which design elements to work with: Just make a checkbox selection in the Design Elements tab of the main signEZ window to choose which design elements you'd like to sign or audit.

**1.2 Set your options:** In the **Settings tab** of the main signEZ window you can choose what you'd like to do with any selected design elements. The three **Action options** are: **Sign**; **Clean and Sign** (ie sign plus delete the selected design elements' **\$UpdatedBy fields**); and **Audit**.

#### The Selection Tree in the main signEZ window



**1.2.1 More options:** The options in the bottom of the **Settings tab** are contextual, changing depending on which **Action option** is selected above. For a detailed explanation of available settings, please see the Ytria Help Database at http://www.ytria.com/WebSiteHelp.nsf.

Design Elements Setting	gs Sign Using				
Action Signi	🔘 Clean and Sign	O A <u>u</u> dit			
Signature options         □ Save previous info in Log database         ☑ Prompt for each signature         ☑ Re-sign my design elements         ☑ Verify previous signatures					
Do not re-sign the <u>f</u> ollow	wing signatures: 🔲 Re-sig	n the <u>following</u> signatures:			

1.2 The signEZ Settings tab

The signEZ Design Elements tab is where you select the documents you'd like to work with

This button can either be "Sign", "Clean & Sign" or "Audit" depending on what action setting you choose in the Settings tab

**1.3** Choose a signing ID: The Sign Using tab lets you choose options related to signature IDs. This tab is divided into three sections: Stored ID information; Sign using another ID; and Sign using current ID.

Design Elements Settings Sign Using						
○ Sign using stored ID file						
Stored ID information						
	Stored ID info Store a new ID Delete Stored ID					
ID Reference: G	len Aaron/Demo2 🗸 🗸					
Sign using another ID     Selected ID file     C:\notes\data\GlenAaron.id     Change						
Sign using current	🚫 Sign using current ID					
Current user information						
User Name:	User Name: Peter WOODFORD /YTRIA					
Password status:	Your password is not saved Delete password					

#### The signEZ Sign Using tab

**1.3.1 Stored ID information:** From here you can store and manage signature ID files. If you click the **Store a new ID button**, you can choose an ID file (you'll be prompted to enter its password) and once you click **Save** it will be placed in the current **signEZ database (see 2.1 for more on this database)**. ID passwords will be protected using signEZ's AES-based encryption algorithm.

🐨 Stored ID Information	X
User Info User Authorized Database Force Log	
Users who have access to this Stored ID	Limit access to these users. 🔽
Users Alain Test5/YTRIA Peter WOODFORD/YTRIA	Litt User Edit User Address Book Bernove User
	Copy From
	<b>Save</b> Cancel

1.3.1 The signEZ Stored ID Information window allows you to delegate design signatures

Once you have an ID file stored you can set conditions for its use by clicking the **Stored ID info button**. In the **Stored ID Information window**, you can set who has access to a stored ID and in what databases these users can sign with this ID.

**Note:** In signEZ you can sign using another ID and open databases in Notes or Designer will not close on you (as they would if you switched IDs in Notes).

**1.3.2** Sign using another ID: From here you can select an ID file to use for signatures. You can sign with any ID provided you know its password.

**1.3.3 Sign using current ID:** Here you can opt to use the currently logged-in ID for signatures.

**1.4 Signing and auditing:** Once you've made a selection in the **Design Elements tab** and set the parameters to your liking in the **Settings** and **Sign Using tabs** you're ready to click the **Sign**, **Clean and Sign** or **Audit** 

🐺 The Library on Demo2/Demo2 (Demo\DEMOINIT.NSF) Number of elements audited 80 Number of elements ignored 0 Signed By Last Signed Type 🛛 💥 Design Element Name 💥 🛛 Signed By 🔺 🔐 🛛 Last Signe 🔨 Signed By : Glen Aaron/Demo2 (18) Last Signed : 17/03/2008 4:52:22 PM (1) Forms \$\$ReturnAuthenticationFailure Glen Aaron/Demo2 17/03/200 Last Signed : 17/03/2008 4:52:23 PM (17) Signed By : Peter WOODFORD/YTRIA (62) 🗄 Last Signed : 27/08/2007 11:47:30 AM (1) Last Signed : 22/10/2007 5:49:53 PM (1) Frame... MasterDoclibFrameset Peter WOODFORD/YTRIA 22/10/200 Last Signed : 22/10/2007 5:49:54 PM (8) Share... \$\$Return Peter WOODFORD/YTRIA 22/10/200 Share... AltFrom Peter WOODFORD/YTRIA 22/10/200 5 Share... Alti and Peter WOODFORD/YTRIA 22/10/200 「★」Share... Expire Peter WOODFORD/YTRIA 22/10/200 「★」Share... From Peter WOODFORD/YTRIA 22/10/200 「★」Share... Private Peter WOODFORD/YTRIA 22/10/200 T\*5 Share... ViewList Peter WOODFORD/YTRIA 22/10/200 Share... tmpFrom Peter WOODFORD/YTRIA 22/10/200 Last Signed : 07/12/2007 3:50:58 PM (1) > Export to File... OK

1.4 The signEZ Signature and Audit Status window

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button (whichever you chose in the Settings tab will appear) at the bottom of the main SignEZ window. A Signature or Audit Status window will appear after signing or auditing. This window offers grouping functionality (dragging column headers to sort information) and it also offers an Export to File option. When exporting, you can choose between HTML and plain text.

1.4.1 **Remember my settings:** If you sign or audit any design elements while the **Remember my settings checkbox** is ticked, signEZ will create a document in the **signEZ database** that will save your signature or audit settings for future use.

**Note:** These saved settings will be the defaults for the database currently open in signEZ. If the database already has default settings, clicking **Remember My Settings** will overwrite them.

Read Private Design Elements (\

Remember my settings

The signEZ Remember my settings checkbox

# 2 The signEZ database lets you batch sign, analyze signature logs and more. Here's how:

2.1 The signEZ database: This NSF database is used as a container for stored ID files, logs (optional) and Saved Settings documents, plus it serves as a powerful application in its own right. You can access a number of signEZ's advanced features through the signEZ database. This database is either called YtriaEZSuite.nsf (which you should have if you installed signEZ as part of a suite) or signEZ.nsf (if you installed signEZ on its own). Whatever .nsf file you use, it should be placed on a server if you plan on using it to hold delegated stored IDs or logs.

You can have as many signEZ databases as you like (eg it may be useful to have separate databases for storing ID files and logs, each with different ACL settings), you just need to use the 'Link to Another signEZ Database' command in the signEZ application's Database menu to switch active databases.

**Note:** If you accidentally deleted your signEZ database, don't worry: you can download a new copy at www.ytria.com. Just click the Downloads link and look for signEZ Template.

**2.1.1** The Saved Settings view: This is the first of the two views in the signEZ database. If you checked the Remember my settings box, any of the settings used for signing or auditing will appear here. You can execute one-or-more saved signing/auditing operations from this view by selecting the documents then clicking the Execute (or Execute with Another ID) action bar button.

**2.1.2 The Logs view:** The other view in the signEZ database is used to store signature or audit logs if you either chose to save logs in the **Settings tab** in signEZ or enable forced logging for delegated signing ID users.

You don't necessarily need to use a signEZ database to store your logs—you can set any database to be the log container from the Force Log tab of the Stored ID Information dialog—but this view is already there for you if you choose a signEZ database.

📑 Create 📑 Create from ... 🕜 Edit 🐌 Set as default 🛛 🖆 Cross Certificates S Install Goto Logs 🛞 Refresh 🛛 🖅 Execute 🖉 Execute with other ID Database 🗘 Leave Signatures from Log File Last Execution 0 0 Demo2/Demo2 Audit The Library (Demo/DEMOINIT.NSF) - none The Library (Demo/DEMOINIT.NSF) 🚖 - none -YtriaEZSuite.nsf (on Local) 16/07/2007 02:30:49 PM 禽 The Library (Demo/DEMOINIT.NSF) - none \* The Library (Demo/DEMOINIT.NSF) 📩 - none -YtriaEZSuite.nsf (on Local) ▼ Sign The Library (Demo/DEMOINIT.NSF) 11/06/2008 04:48:31 PN - none -The Library - none 22/10/2007 05:49:53 PM (Demo/DEMOINIT.NSF) Local Sign Agent Log (/alog4.ntf) 🚖 - none -YtriaEZSuite.nsf (on Local) Archive Log (6) 🕏 - none 1 YtriaEZSuite nsf (on Local).

2.1.1 The Saved Settings view in the signEZ database

$\triangleright$ c	🕞 Goto Saved Settings 🚸 Select All 🥌 De-select All 🍄 Delete Selected 🔬 Open Selected 🖉 Process Selected 🔯 Install							
		action By 🗘	⇔ with ≎	k signer ID 🗘				
2 ▼ Audit Report								
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		Peter WOODFORD/YTRIA	Using current ID	Peter WOODFORD /YTRIA				
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	2	Demo2/Demo2						
<ul> <li>✓</li> </ul>	1	<b>• 09/03/2010 05:03:</b>	25 PM					
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	1 V09/03/2010 05:03:25 PM							
		Peter	Using another ID	Glen Aaron/Demo2				

2.1.1 The Logs view in the signEZ database

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And you can extend the power of signEZ with LotusScript. **Here's how:** 

3.1 Power-users can craft their own custom signEZ solutions: Go to www.ytria.com/WebSiteHelp.nsf for more information.



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