

## QUICK START GUIDE

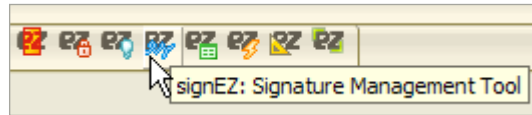


Your Notes signature nightmares are over. Ytria signEZ gives you

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.

1

Ytria signEZ lets you quickly sign or audit signatures for multiple documents. Here's how:



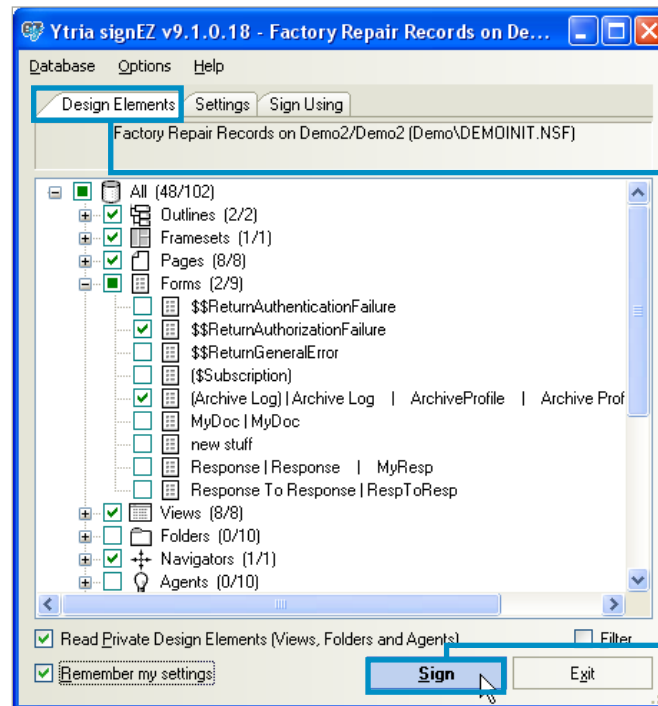
### 1.1 Choose which design elements to work with:

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.

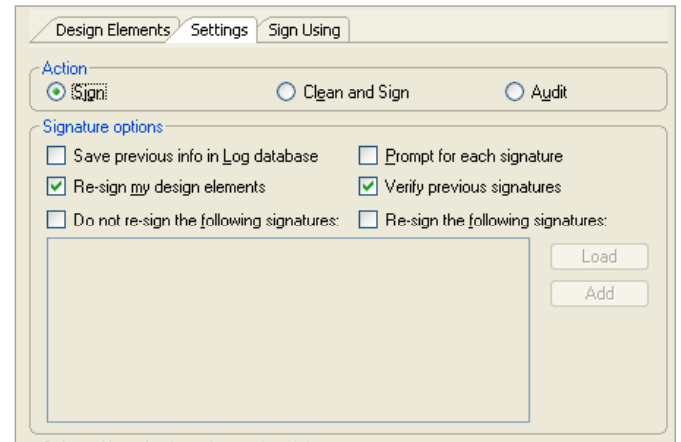
### 1.2 Set your options:

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>.

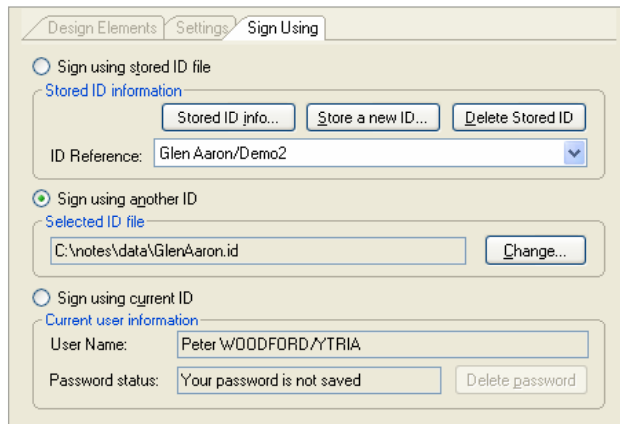


1.2 The signEZ Settings tab

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

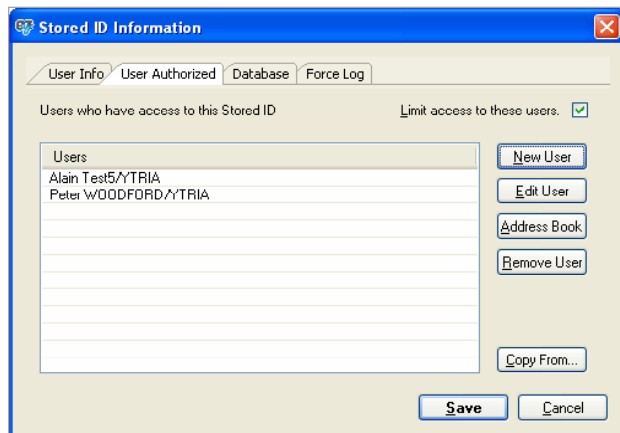
This button can either be "Sign", "Clean & Sign" or "Audit" depending on what action setting you choose in the Settings tab

**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.



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.



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.

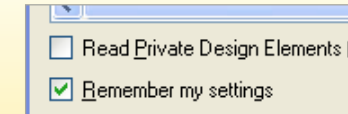
**1.3.3 Sign using current ID:** Here you can opt to use the currently logged-in ID for signatures.

**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

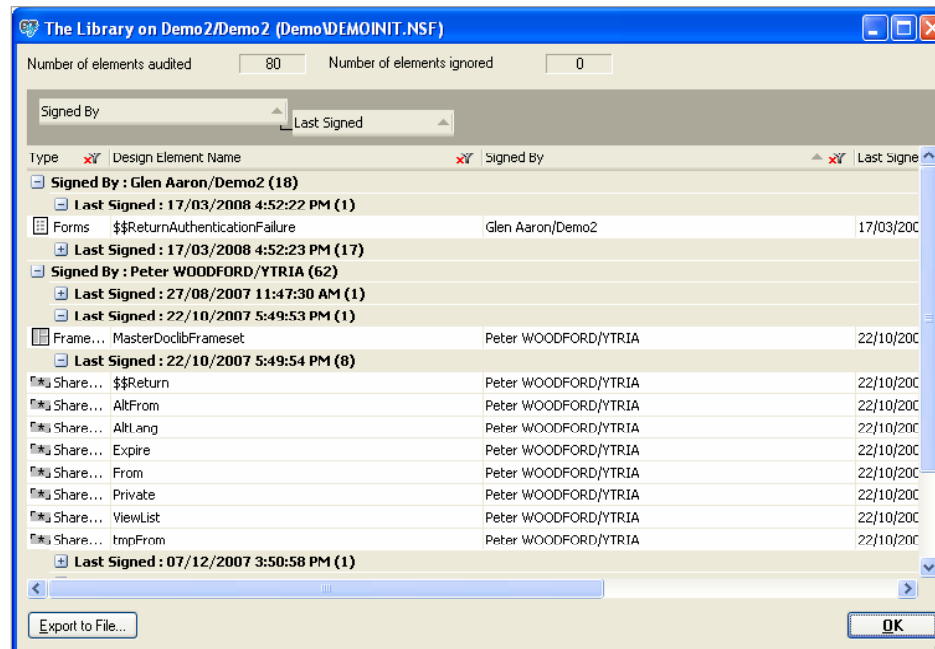
button (whichever you chose in the Settings tab will appear) at the bottom of the main SignEZ window. A Signature or Audit Status window will appear after signing or auditing. This window offers grouping functionality (dragging column headers to sort information) and it also offers an Export to File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



The signEZ Remember my settings checkbox



1.4 The signEZ Signature and Audit Status window

## 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.

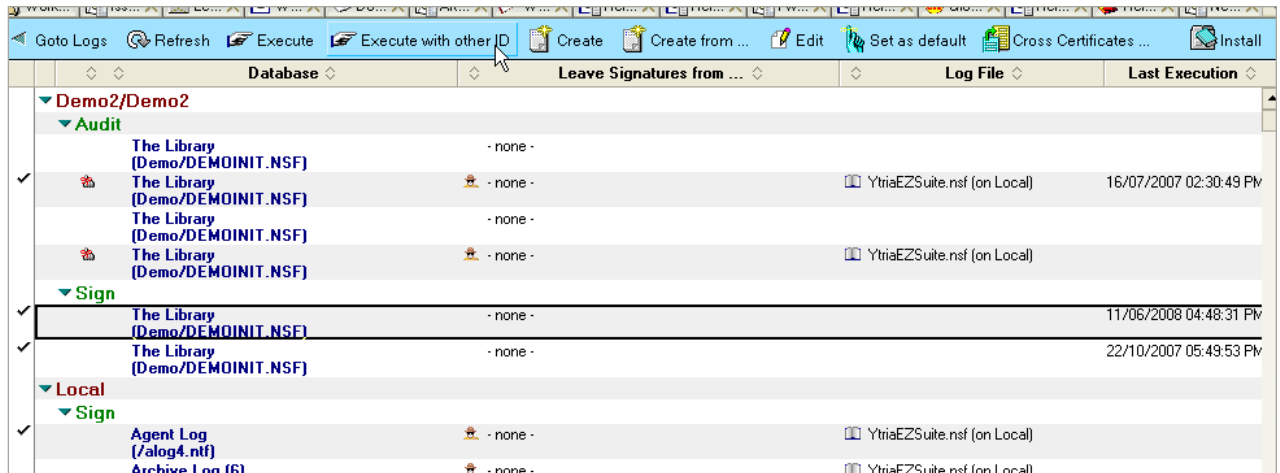
You can have as many signEZ databases as you like (eg it may be useful to have separate databases for storing ID files and logs, each with different ACL settings), you just need to use the 'Link to Another signEZ Database' command in the signEZ application's Database menu to switch active databases.

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

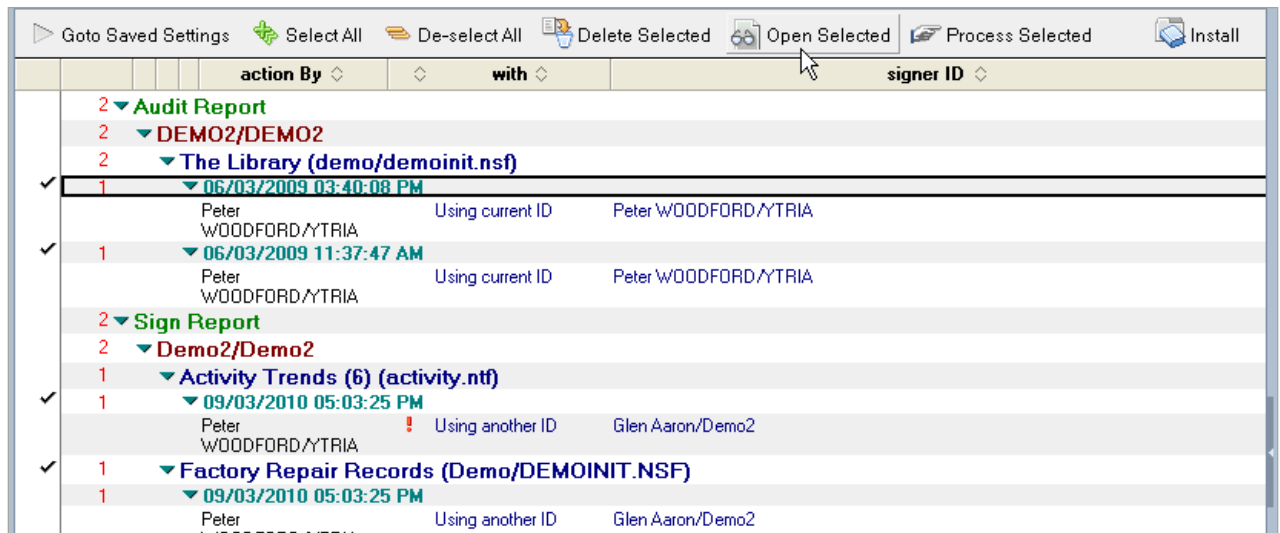
**2.1.1 The Saved Settings view:** This is the first of the two views in the signEZ database. If you checked the Remember my settings box, any of the settings used for signing or auditing will appear here. You can execute one-or-more saved signing/auditing operations from this view by selecting the documents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



2.1.1 The Saved Settings view in the signEZ database



2.1.1 The Logs view in the signEZ database

## 3

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](http://www.ytria.com/WebSiteHelp.nsf) for more information.