SaaS
WHITEPAPER

IndorseSign is Document and Process services platform for:
- Customers and Businesses
- Citizens and Public Sector

to sign and manage their digital documents.

Indorse Services

SUMMARY

IndorseSign is a document, process and signature management platform. It has patented features for signing, endorsing and administering digital documents. As a secure Software as a Service solution, IndorseSign allows users to annotate, prepare sign, seal, endorse, protect, manage and archive documents easily and efficiently..

IndorseSign helps companies increase their efficiency, improve their productivity, collaborate better, work more secure, be legally compliant and save money.

INTRODUCTION

ABOUT IndorseSign

IndorseSign is a document, process and signature management platform. It has patented features for signing, endorsing and administering digital documents. As a secure Software as a Service solution, IndorseSign allows users to annotate, prepare sign, seal, endorse, protect, manage and archive documents easily and efficiently.

WHY WE DEVELOPED IndorseSign

For many years, governments, businesses and individuals have wasted a lot of money and effort delivering and archiving documents. ERP and CRM provided a solution to structure transactions data, but the unstructured legal data that required approval was still kept on paper. While the internet provides a means to deliver electronically signed documents, recipients still require these documents to be endorsed and need proof that electronic signers are authorized to sign these. Therefore, IndorseSign provides a complete solution to digitally manage, sign and endorse documents.

DEPLOYMENT OPTIONS

IndorseSign is deployed on Linux or Windows servers and clustered for high availability. It is run from multiple data centers in case of disaster recovery.

- The IndorseSign platform is deployed on cloud data centers, integrated with Remote Signature, Seal Services and Certificate Authority (CA) API's. Users can then use IndorseSign in the cloud, through their web-browser.

- For customers who need to use the IndorseSign platform on premise, for an extra fee it can be installed on their own local server and integrated with the IndorseSign platform in the cloud. Customers can use both the cloud and on-premise-version.

Unique FUNCTIONALITIES

IndorseSign is powered by a rich ECM from Alfresco with added unique multi-tenant functionalities. The solution allows users to annotate, prepare, sign, seal, endorse and lock and unlock documents, and validate PKI-based transactions. Also, the solution has a built-in document management system with document versioning, workflows and archiving.

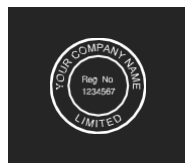IndorseSign unique functionalities are:

ANNOTATE
Users can draw using an e-Pen, a touch-screen or a mouse on every selected PDF-page.
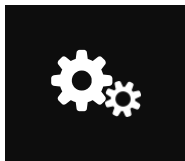
PREPARE
Users can review the content of the PDF and then digitally prepare it for signing. This is done using a PKI-based transaction.

SEAL
In order to certify that a document is authentic, users can digitally seal the document by placing an enrolled seal on the PDF page for certification. This is done using a PKI-based transaction.

SIGN
After reviewing the content, users can digitally sign by placing an enrolled signature on the PDF page for approval. This is done using a PKI-based transaction.

ENDORSE (A PATENTED FEATURE)
After signing the PDF digitally, eligible users can digitally endorse it by placing the enrolled stamp on the PDF page for authorization. This is done using a PKI-based transaction.

LOCK & UNLOCK
Users can digitally lock (or encrypt) the PDF and define users that are allowed to unlock (or decrypt) it. These users can Unlock the PDF after authentication. This is done using a PKI-based transaction.

VALIDATE DOCUMENT
A document can have one or more PKI-based transactions.

Internal or external users can verify the validity of the PKI-based transactions in a selected document. The document validation function uses a standard PKI verification for each transaction on the document. document validation functions check the following elements:

1. **DOCUMENT INTEGRITY:** verify that the document has not been tampered with after a digital transaction.

2. **DIGITAL CERTIFICATE:** check the validity of the signer certificate at time of transaction and show details of the certificate issuer.

3. **DIGITAL TRANSACTION TYPE:** check what kind of Digital Transaction is applied on the document. Digital Transactions can be one of the following: prepare, sign, seal or endorse. The validation function will also show the user name that performed each transaction.

4. **Enrollment AUTHORIZATION:** This will show if the Seal or Stamp references used in the documents were authorized by an administrator.

SUBSCRIBING TO IndorseSign

IndorseSign supports three types of plans:

STANDARD: All users use an INDORSE Certificate
ADVANCED: Users sign using their own advanced digital certificate Users
QUALIFIED: sign using their own qualified digital certificate

Users need to be assigned to individual plans.

All certificates are issued by an Authorized Certificate Authority - as per EU regulation. For users of Advanced or Qualified Certificates, the user will need to follow the identification process of the authorized CA. Admin users have the option to administer users within the same domain.

IndorseSign requires the user admin to authorize the enrollment file of each user. This creates the required four ways control to ensure security.

Administered Enrollment (a patented feature) is a process that is applied when new images of signature, seal or stamp are stored in IndorseSign. Here is how to make an enrollment:

SIGNATURE ENROLLMENT
(MANDATORY)

The first time the user logs in, he needs to sign an end user subscription agreement (EUSA), either by:

A. Placing the default signature (which contains name & email) on the signature page of EUSA PDF and clicking Save.

B. Drawing with an e-Pen, using touch or a mouse on the signature page of EUSA PDF and clicking Save.

SEAL ENROLLMENT (OPTIONAL)

To be able to seal documents, users need to upload a seal image to enroll the seal. After the user is authenticated and the enrollment file is authorized by the administrator, the user can seal PDF documents.

STAMP ENROLLMENT (OPTIONAL)

To be able to endorse documents, users need to upload a stamp image to enroll the stamp. After the user is authenticated and the enrollment file is authorized by the administrator, the user can endorse PDF documents.

ADMINISTRATOR ROLE IN IndorseSign

The solution has an Administrator role which functions as a normal user role but has some additional functions:

ENROLLMENT AUTHORIZATION: The administrator can review, authorize or reject an enrollment file of other users within the organization

SUSPEND: The administrator can suspend PKI-based transactions (Sign, Seal or Endorse) of other users within the organization.

BENEFITS OF USING IndorseSign

INCREASED EFFICIENCY & IMPROVED PRODUCTIVITY

In earlier times, sending and signing documents took ages: physical copies needed to be delivered by couriers to be signed. Contracts no longer need to be printed, signed, scanned and uploaded: one can just sent a digital version, which is automatically stored in the right place after it has been signed and returned.

BETTER SECURITY

Because normal signatures can be forged relatively easily, people could, for example always try to cancel a contract, stating they never signed it. With a digital signature this is no longer possible: once an entity has signed a contract using his or her private key, they cannot deny doing so at a later time. Moreover, IndorseSign makes complying with regulations much easier, because every transaction in a DTM solution leaves a digital audit trail. This is especially important now that eIDAS, a new set of rules for electronic identification and trust services within the European single market has been enacted, compelling companies to be able to map and show their previous actions.

SAVE MONEY

Digital signatures also save money: companies make less material expenses, i.e. paper and ink. When large companies no longer have to send out multiple hundreds of contracts a week, it becomes costly pretty quickly. Digital signatures also allow companies to save on shipping costs and on administration fees.

INTERNAL AND EXTERNAL COLLABORATION

As a Digital Transaction Management solution, INDORSE allows multiple people to work in the same document at the same time: edits can be differentiated by time stamps. If employees want to work from home, they can easily do so, because they are able to access their files from every device and at any place they want – of course only after they have been given access.

LEGAL COMPLIANCE

Since September 2018, all organizations delivering public digital services in an EU member state must recognize electronic identification from all EU member states as a result of eIDAS. INDORSE took some necessary steps to ensure organizations using our solution comply with eIDAS: every signer needs to have a Qualified Digital Certificate in order to carry out electronic transactions that are legally certain and highly secured. Intesi Group, an eIDAS compliant Trust Service Provider, organizes and carries out the issuance of Qualified Digital Certificate for INDORSE users.

Conclusion

E-signing, authenticating, sharing, transferring, certifying, archiving and managing documents normally takes a lot of effort. Moreover, when not properly secured, companies are at risk of being breached – with all the consequences that entails. Using IndorseSign, they can perform and manage digital transactions from anywhere, at any time and on any device they want. Digital Transaction Management will be easier and better secured at the same time.

CHOOSING IndorseSign, ORGANIZATIONS ARE ABLE TO BE MORE EFFICIENT AND ACCOMPLISH MORE IN LESS TIME