

# ENTRUST

## Remote Signing Service

### Administrator Quick START GUIDE

April 4, 2022

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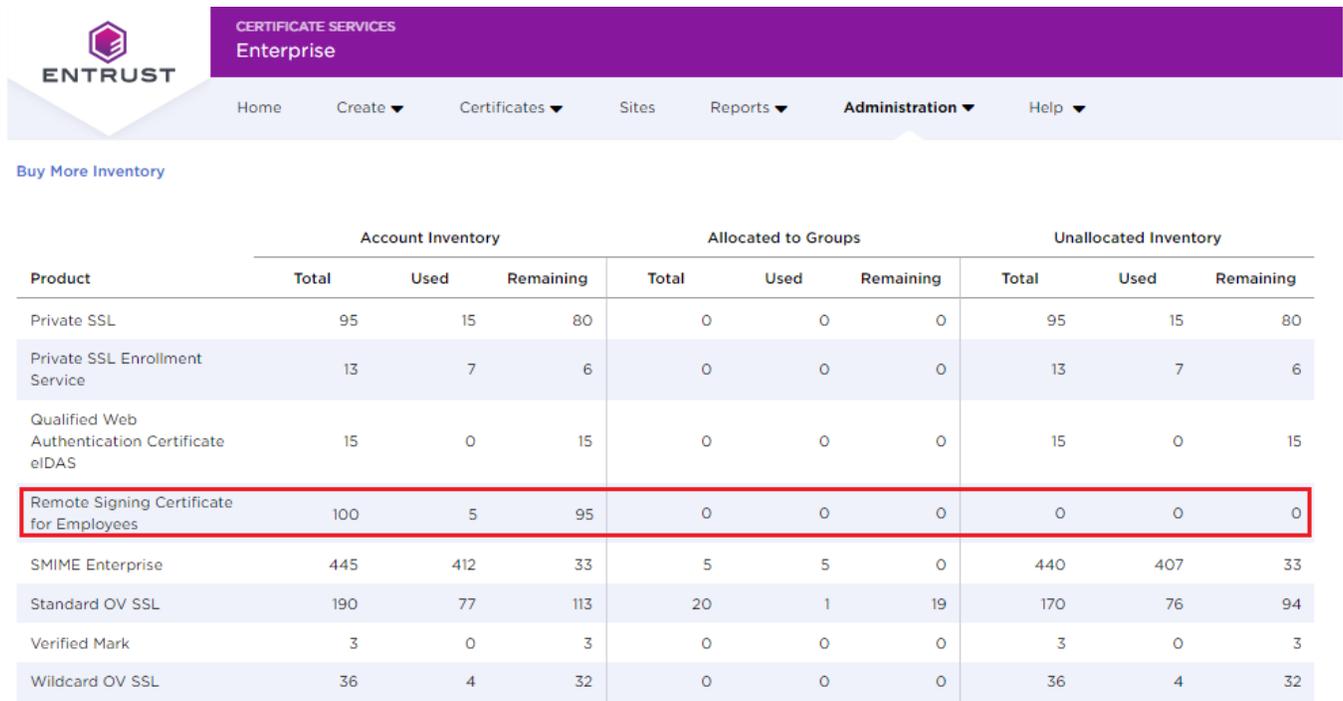
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# 1 Checking the inventory

Before starting to create the Signer users, it is recommended to check that the inventory is sufficient for the number of users that are needed.

- 1 Log in to the ECS Portal as a Super Admin or Requester user.
- 2 Navigate to **Administration > Inventory > View Total Inventory**.
- 3 Look for the row that starts with *Remote Signing Certificate for Employees* and check that the *Remaining* value is sufficient.



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| Product  | Account Inventory |      |           | Allocated to Groups |      |           | Unallocated Inventory |      |           |
|--|-------------------|------|-----------|---------------------|------|-----------|-----------------------|------|-----------|
|  | Total             | Used | Remaining | Total               | Used | Remaining | Total                 | Used | Remaining |
| Private SSL                                    | 95                | 15   | 80        | 0                   | 0    | 0         | 95                    | 15   | 80        |
| Private SSL Enrollment Service                 | 13                | 7    | 6         | 0                   | 0    | 0         | 13                    | 7    | 6         |
| Qualified Web Authentication Certificate eIDAS | 15                | 0    | 15        | 0                   | 0    | 0         | 15                    | 0    | 15        |
| Remote Signing Certificate for Employees       | 100               | 5    | 95        | 0                   | 0    | 0         | 0                     | 0    | 0         |
| SMIME Enterprise                               | 445               | 412  | 33        | 5                   | 5    | 0         | 440                   | 407  | 33        |
| Standard OV SSL                                | 190               | 77   | 113       | 20                  | 1    | 19        | 170                   | 76   | 94        |
| Verified Mark                                  | 3                 | 0    | 3         | 0                   | 0    | 0         | 3                     | 0    | 3         |
| Wildcard OV SSL                                | 36                | 4    | 32        | 0                   | 0    | 0         | 36                    | 4    | 32        |

## 2 Service setup and management

The general steps for setting up the Remote Signing Service for your employees are:

- 1 In your Entrust Certificate Services Enterprise account, create a Signer user for each employee who will need to sign documents.
- 2 The employee receives an email prompting them to complete Personal Identity Validation.
- 3 When the Personal Validation has been completed, the employee receives another email, confirming success of their Personal Validation and providing a link and credentials for the RSS Portal.
- 4 The employee logs into the RSS Portal, sets up second-factor authentication, and grants consent to create their personal signing certificate.
- 5 The employee's Remote Signing certificate is created.

The employee can now sign documents. There are three ways to sign documents:

- 1 The employee chooses to sign using the Entrust Desktop Virtual Card.
  - The Desktop Virtual Card is a plug-in that allows Windows applications to use remote keys located in the Entrust Remote Signing Service for authentication and signing.
  - To Use: Activate the Entrust Virtual Card with credentials, then use a second factor authenticator to sign in from Adobe Acrobat or other Windows desktop application.
- 2 The employee chooses to sign through a Signing Partner (e.g. Adobe, Sysmosoft).
  - The employee logs in to the Signing Partner web page or application and uploads the document to be signed. When prompted to select the Digital ID provider and selecting Entrust, they will be prompted for their Remote Signing Service credentials, both first and second factors.
- 3 The employee signs using a custom signing app, developed using the CSC Remote Signing API.
  - CSC is "Cloud Signature Consortium." This body develops and maintains architectures, protocol, and API specifications for remote signature applications.
  - Entrust has developed a RESTful API based on CSC specification for use in developing custom signing applications.

### 2.1 Signer user/employee setup

An ECS Enterprise Super Admin or Requester user logs into the ECS Portal, and adds the employee as a Signer user.

- 1 Log in to the ECS Portal as a Super Admin or Requester user.
- 2 Navigate to **Administration > User Management**, and click **Add User**.

- 3 Select **Signer**, and click **Next**.
- 4 Complete the Signer details, and select the checkbox labelled **Allow this user to register for the Remote Signing Service**.  
**Note:** The domain in the user's email address must be a verified domain.
- 5 Click **Submit**.

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Buy Messages Support Chat Account

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Add User

Super Admin Users

Sub Admin Users

Requester Users

Signer Users

All Users

**Add User**

Select the user role and click **Next** to proceed.

**User Role**

Super Admin

Sub Admin

Requester

Signer

Cancel Next

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Fill in the user's name and email address. The domain in the email address must already be verified.

**User**

Given Names: Sally

Family Name: Hatfield

Phone: 6135555555

Email Address: sally.hatfield@Company.com

**Note:** This email address must use a domain approved for this account. If you are adding the Remote Signing Service permission, this email address must use a domain approved for the primary client on this account.

**Permissions**

In addition to emails requiring completion of Personal Validation, this Signer user will receive an email inviting them to register for the Remote Signing Service.

Allow this user to register for the Remote Signing Service.

Back Cancel Submit

The new Signer user appears in the Users grid with status **Pending**.

| Actions                             | Name ↓         | Phone      | User ... | Email Address               | Group | Status  | R  |
|-------------------------------------|----------------|------------|----------|-----------------------------|-------|---------|----|
| <input checked="" type="checkbox"/> | Sally Hatfield | 6135555555 |          | sally.hatfield@ Company.com |       | Pending | Si |
| <input type="checkbox"/>            | name surname   | 6135555555 |          | name@testcertificates.com   |       | Pending | Si |
| <input type="checkbox"/>            | Frank Smith    |            |          | fsmith@testcertificates.com |       | Active  | Si |
| <input type="checkbox"/>            | Bob Lee        |            |          | bob.lee@entrust.com         |       | Active  | Si |

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The new Signer User (Sally Hatfield) receives an email containing instructions for completing Personal Validation and for obtaining the Entrust Identity application.

## 2.2 Managing Signer users

An ECS Enterprise Super Admin can deactivate a Signer user, if necessary; you might want to do this if the employee associated to the Signer user leaves the company or changes job responsibilities and no longer needs to sign documents.

There are two ways to deactivate a Signer user from the User grid, using the Actions menu or using the Deactivate toggle.

**NOTE:** When a Signer user is deactivated, their certificate is revoked and returned to inventory and can be used for another user.

- 1 Log in to the ECS Portal as a Super Admin.
- 2 Navigate to **Administration > User Management > Signer Users**.
- 3 On the row for the Signer User to deactivate:
  - Select the checkbox, and click **Actions > Deactivate**.
  - Click the toggle in the **Actions** column.
- 4 A confirmation dialog box appears. Click **OK**.

When the Signer User is deactivated, their credentials are no longer valid.

It is recommended that you also make sure that the Remote Signing certificate associated with the Signer user is revoked.

The screenshot shows the Entrust Certificate Services Enterprise portal. The top navigation bar includes 'Buy', 'Messages', 'Support', 'Chat', and 'Account'. The main navigation bar has 'Home', 'Create', 'Certificates', 'Sites', 'Reports', 'Administration', and 'Help'. A sidebar on the left lists user roles: 'Add User', 'Super Admin Users', 'Sub Admin Users', 'Requester Users', 'Signer Users', and 'All Users'. The main content area displays a table of users with columns for Name, Phone, User ID, Email Address, Group, Status, and Role. The 'Actions' dropdown menu is highlighted with a red circle, showing options like 'Open' and 'Deactivate'. The table lists three users: Bob Lee, Frank Smith, and TechFirst TechLast, all with 'Active' status and 'Signer' role. The footer contains copyright information for Entrust Corporation.

## 2.3 Managing Remote Signing Certificates

There are three management actions that can be performed on Remote Signing Certificates.

### 2.3.1.1 Revoking a Remote Signing certificate – Super Admin only

If an employee leaves the company or a certificate becomes compromised, the ECS Super Admin can revoke the certificate from the ECS Portal.

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**NOTE:** Revoked certificates are returned to inventory and can be used for another user.

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- 1 Log in to the ECS Portal as a Super Admin.
- 2 Navigate to **Administration > Certificates > Managed Certificates**.
- 3 On the row for the Remote Signing Certificate to revoke, select the checkbox, and click **Actions > Revoke**.
- 4 A Revoke dialog box appears. Select a reason for revoking the certificate, and click **Confirm**.

ENTRUST CERTIFICATE SERVICES Enterprise

Home Create Certificates Sites Reports Administration Help

Buy Messages Support Chat Account

Logout

ECS Certificates Foreign Certificates Pending Approvals Pending User Pickup Active Remote Signing Pending Requester Confirmation PKI Certificates

Actions Revoke

Search: Provide at least 3

Drag a column header and drop it here to group by that column

| Tracking ID                                | Certificate Type           | Common Name  | Serial Number (Hex)      | Pickup Status | SAN List | Cert Friendly Name          | Organization (O)  | Organizational Unit (OU) | Subject DN          | Issue Date   | Ex |
|--|----------------------------|--------------|--------------------------|---------------|----------|-----------------------------|-------------------|--------------------------|---------------------|--------------|----|
| <input checked="" type="checkbox"/> 494269 | Remote Signing Certific... | Enric Granda | 14837E55CEC34FB4E72A...  | Active        |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 18, 2021 | Fe |
| <input type="checkbox"/> 494161            | Remote Signing Certific... | Enric Granda | 3D207E3CF567A19AA23...   | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494160            | Remote Signing Certific... | Enric Granda | 3B8FD157D328EDFF038E...  | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494159            | Remote Signing Certific... | Enric Granda | 57D9532E524AADE7273...   | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494158            | Remote Signing Certific... | Enric Granda | 22AE0B5C88DD2F4AA0...    | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494157            | Remote Signing Certific... | Enric Granda | 605DBA45C8DCBEE7BC...    | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494156            | Remote Signing Certific... | Enric Granda | 2A1FE4C09036C7A35981...  | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494155            | Remote Signing Certific... | Enric Granda | 2AD76CAB52ED9AFBA53...   | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494154            | Remote Signing Certific... | Enric Granda | 6FA664CE6859EB7DC65...   | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494153            | Remote Signing Certific... | Enric Granda | 5A4F818230412C3979F8...  | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 16, 2021 | Fe |
| <input type="checkbox"/> 494143            | Remote Signing Certific... | Enric Granda | 216CBA7C63EFD1C7785...   | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 15, 2021 | Fe |
| <input type="checkbox"/> 494139            | Remote Signing Certific... | Enric Granda | 5DFB3B66C5F7E9F42E...    | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 15, 2021 | Fe |
| <input type="checkbox"/> 494132            | Remote Signing Certific... | Enric Granda | 155F02C59A127A76809D...  | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 15, 2021 | Fe |
| <input type="checkbox"/> 494131            | Remote Signing Certific... | Enric Granda | 4CB6776C9F68FD58F5...    | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 15, 2021 | Fe |
| <input type="checkbox"/> 494112            | Remote Signing Certific... | Enric Granda | 124D0B7AC42365B5C507...  | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 12, 2021 | Fe |
| <input type="checkbox"/> 494111            | Remote Signing Certific... | Enric Granda | 6F28392310E79CB21334F... | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 12, 2021 | Fe |
| <input type="checkbox"/> 494110            | Remote Signing Certific... | Enric Granda | 7A9CFB957255BD264C8...   | Renewed       |          | entrust.com (Enric Grand... | DMortimer Company |                          | email=enric.gran... | Feb 12, 2021 | Fe |

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### 2.3.1.2 Renewing a Remote Signing certificate – Signer User only

In the RSS Portal, the Signer User can see the status of their certificate at any time by clicking **Manage Certificate**. The certificate will be in one of three states:

- Active
- Expiring Soon
- Expired

The Signer User can renew their certificate by clicking **Renew Certificate**.

ENTRUST CERTIFICATE SERVICES Remote Signing Service

Home **Manage Certificate** View Activity Logout

**Remote Signing Certificate Details**

These are the details that make up your Signing Certificate. If any of these details change, please contact the Certificate Administrator in your company.

Status: **Expiring soon**

Owner Name: John Doe

Email: John.Doe@gigabyte.com

Organization: Gigabyte

Issue Date: Oct 13 2020, 03:30 PM

Expiry Date: Oct 14 2021, 12:00 AM

Your certificate will expire soon. Click **Renew Certificate** before the expiry date to create a new certificate, and avoid an interruption in your ability to sign documents.

**Renew Certificate**

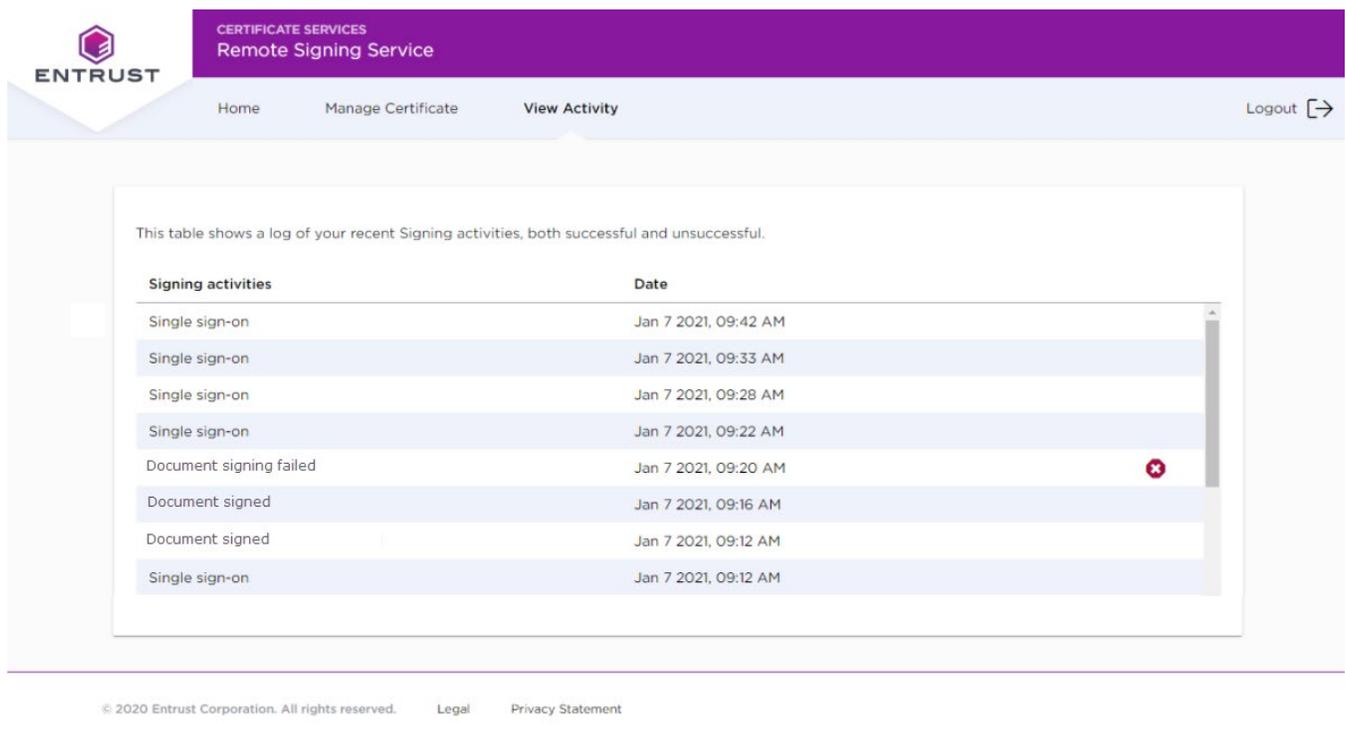
### 2.3.1.3 Viewing Signings log – Signer User only

In the RSS Portal, the View Activity menu allows the Signer User to see the log activity. The following events are shown on this log:

- Creation of the Signer User RSS account
- Creation of the Remote Signing certificate
- Sign-on to the Signer User Portal
- Successful document signings
- Revocation of the Remote Signing certificate

And also the failure cases:

- Failure of account creation
- Failure of certificate creation
- Failure of document signing



The screenshot shows the Entrust Remote Signing Service (RSS) portal. The header includes the Entrust logo and the text 'CERTIFICATE SERVICES Remote Signing Service'. The navigation bar contains 'Home', 'Manage Certificate', 'View Activity', and 'Logout'. The main content area displays a table of signing activities with the following data:

| Signing activities      | Date                 |
|-------------------------|----------------------|
| Single sign-on          | Jan 7 2021, 09:42 AM |
| Single sign-on          | Jan 7 2021, 09:33 AM |
| Single sign-on          | Jan 7 2021, 09:28 AM |
| Single sign-on          | Jan 7 2021, 09:22 AM |
| Document signing failed | Jan 7 2021, 09:20 AM |
| Document signed         | Jan 7 2021, 09:16 AM |
| Document signed         | Jan 7 2021, 09:12 AM |
| Single sign-on          | Jan 7 2021, 09:12 AM |

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## 2.4 Signer user enrollment

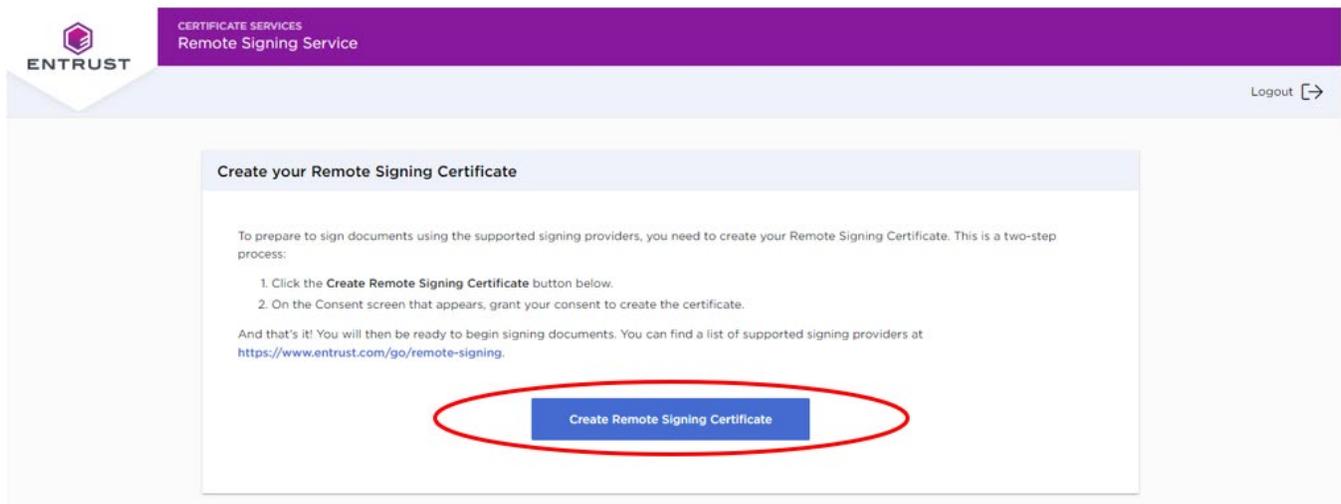
The new Signer User receives an email containing instructions for completing Personal Validation and for obtaining the Entrust Identity application.

To enroll, the new Signer User must:

1. Follow the link to the Personal Validation form. Fill in the form, accept the license agreement and click **Submit**. Make a note of the password set here.

2. Open the email that follows to see instructions for completing Personal Validation, and complete the validation.
3. Download and install Entrust Identity for Mobile or Entrust Identity for Desktop.
4. Log into the Entrust Identity desktop or mobile app, and create an Identity. Give the new Identity a unique name.
5. Log into the RSS Portal using the email address and password from step 1, then enter the code generated using the Entrust Identity desktop or just tap on the push notification received in the Entrust Identity app.
6. Click **Create Remote Signing Certificate**, and Authorize creation of the certificate.

When these steps are complete, the Signer User is ready to sign documents.



The screenshot shows the Entrust Remote Signing Service web interface. At the top left is the Entrust logo. The top navigation bar is purple and contains the text "CERTIFICATE SERVICES" and "Remote Signing Service". On the top right, there is a "Logout" link with an arrow icon. The main content area has a light blue header that reads "Create your Remote Signing Certificate". Below this header, the text states: "To prepare to sign documents using the supported signing providers, you need to create your Remote Signing Certificate. This is a two-step process:" followed by two numbered steps: "1. Click the **Create Remote Signing Certificate** button below." and "2. On the Consent screen that appears, grant your consent to create the certificate." Below the steps, it says "And that's it! You will then be ready to begin signing documents. You can find a list of supported signing providers at <https://www.entrust.com/go/remote-signing>." At the bottom center of the content area, there is a blue button with the text "Create Remote Signing Certificate", which is circled in red.

### 3 Integrating with signing applications

As described above, the Entrust Remote Signing Service is deployed in the cloud. It relies on the CSC (Cloud Signature Consortium) Remote Signing Protocol for communication between your applications and the Entrust service.

The service can also be used from user desktop applications through the Entrust Desktop Virtual Card plug-in that allows applications to connect transparently to the Entrust Remote Signing Service for signing.

#### 3.1 Entrust Remote Signing Service RESTful API

The RESTful API is based on the CSC specification v0.1.7.9 for remote electronic signatures. This API is used to integrate cloud signing applications with the Remote Signing Service so that Remote Signing certificates can be used to perform document signing.

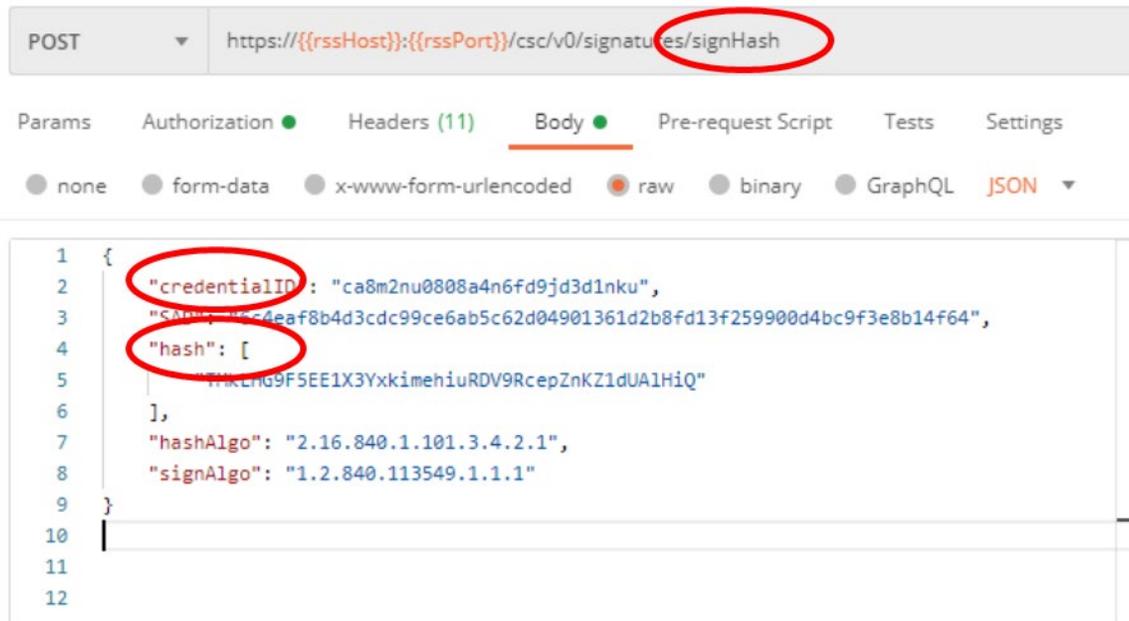
- Signing applications authenticate to the API using the CSC-standard *clientID* and *clientSecret*, supplied by Entrust when signing providers register.
- The Signer user Remote Signing certificate is retrieved from the Entrust RSS and the document is prepared for signing.
- The signing application creates the hash of the Signer user's document and sends it to the RSS.
- The signed hash (the signature) is "attached" to the document being signed. One document can be signed in each transaction.

The Entrust Remote Signing Service includes timestamping and OCSP validation services; these services are used through the standard IETF protocols.

The following CSC API operations are supported:

| Operations                               | Description   |
|--|---|
| info<br>oauth2/authorize<br>oauth2/token | These operations do not require an access token.                      |
| credentials/list<br>credentials/info     | These operations require 1 access token: "service".                   |
| signhash                                 | These operations require 2 access tokens: "service" and "credential". |

A signHash operation example follows.



The CSC API Reference Guide and the demo tutorial examples prepared to run with the Postman tool and instructions are available from the ECS Portal: **Help > API Documentation**.

### 3.1.1 Timestamp and OCSP server

When adding timestamps to signatures, the signature date is accurate and backed by a trusted entity. Timestamps also allow creating Long Term Validation (LTV) signatures when combined with the certificate revocation status provided by the OCSP server.

The Timestamp and OCSP URL services are available in the Remote Signing certificates issued by Entrust.

## 3.2 Entrust Desktop Virtual Card

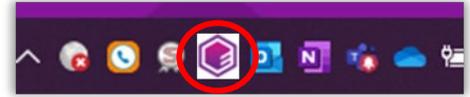
The Desktop Virtual Card is a plug-in that enables digital signatures using remote keys located in the Entrust Remote Signing Service. Depending on the type of certificate, it also can be used for web authentication with digital certificate.

From a user's perspective, it acts like a virtual smartcard because they can remotely utilize PKI keys and certificates in the Service from their desktop applications and office software.

### 3.2.1 Desktop Virtual Card setup

Users can download the Virtual Card from the RSS Portal and install the plug-in in one or more computers.

The virtual card tray icon shows the connection status (logged in/logged out) and the certificate information.



### 3.2.2 Signing with the virtual card

The Signer user experience is the same as when using USB tokens. The user will provide their second factor authenticator to activate the Entrust Remote Signing key and create the signature with their desktop application.

