Wellspring Software

Training Notes

PrintBoss can place digitally scanned signatures on checks to be printed. These signatures can be printed conditionally based on a number of variables. The most common conditions are bank account or dollar value of the document. PrintBoss reads BMP, JPG, and PCX file types.

Saving a signature file to a disk adds a level of security by requiring the disk be inserted in the computer to add the signature file(s) to checks. Wellspring Software offers a *PrintBoss Signature Disk* that provides additional levels of security to the signature printing process. First, the signature file type can only be read by the PrintBoss software. Second, the file is encoded so it requires the secure disk/CD/USB be inserted in the computer to use the PrintBoss signature. The PrintBoss Signature Disk is the key to unlock the encoded signature file. The disk is also encoded so a standard *Disk Copy* will not duplicate the disk. This additional security level prevents the scanned signature file from being used fraudulently in other programs or by unauthorized personnel even in PrintBoss.

PRINTBOSS SIGNATURE DISKS (OR CDS OR USB DRIVES)

PrintBoss Signature Disks are custom created for specific files. These disks and signature files are encoded so the disk cannot be copied using a simple *Disk Copy* command nor can the signature file be read by standard graphics programs. The signature files have a .SIG extension. The disk may be a floppy, CD, or USB key.

✓ **If two signatures are to print on the same check, both signatures should be encoded for the same PrintBoss Signature Disk.**

Copy the actual signature files to the PrntBoss\Logos directory. PrintBoss reads the file and looks for the disk *key* to unlock the file at the point of printing or viewing. The signature can be viewed or printed when the encoding on the disk and signature file match. Otherwise, the signature file will not display or print.

> **NOTE:**

Terminal Server and Citrix environments need the disk in the drive of the server or the user session must have the drive of the local workstation mapped.

Please contact Wellspring Software to order a PrintBoss Signature Disk.

DUPLICATING PRINTBOSS SIGNATURE DISKS

The original PrintBoss Signature Disk and the original PrintBoss Registration Disk or Security Master Password, along with access to the PrintBoss application, are necessary to make a copy of a PrintBoss Signature Disk.

1. Open the PrintBoss Master Application.
2. Click on the **Utilities** menu and select **Install Modules**.
3. Select the **Signature Disk Duplication** tab.
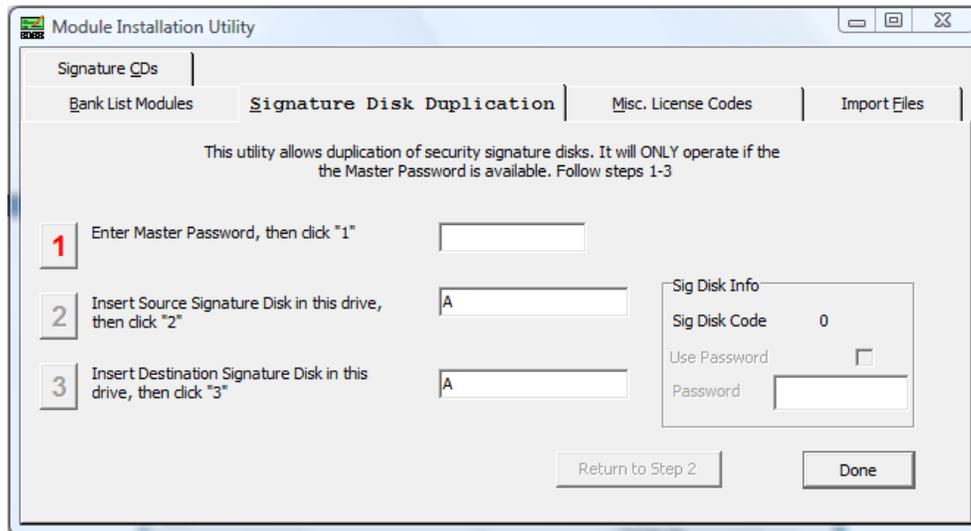
4. Enter the PrintBoss **Master Password** as defined under *Option / Security*.
5. Click on the active **1** button requesting the password. The 1 will fade and 2 will become active.
6. Insert the PrintBoss **Source Signature Disk**.
7. Enter the correct drive letter for the Source Signature Disk. This may be a floppy, CD, or USB flash drive.
8. Click on the active **2** button.
9. Insert a new blank disk. This does not need to be the same type of media as the original. If you are using the same type of media, remove the original disk before inserting the new disk.
10. Enter the correct drive letter for the **Destination** disk. This may be the same as the original disk.
11. For a signature CD**, select the Store Encoded File in {PrntBossHome}\ SigDisks check box.
12. To add a **Password** to the NEW signature disk, check **Use Password** on the right side of the screen. Enter the password in the field provided under the check box. This password will not impact the original disk.
13. Click on the active **3** button.
14. Click **Done** when you are finished.

The newly created signature disk has the required encoding. Any signature files that existed on the source disk are also copied to the destination disk (except if it is a CD). Signature files do not need to reside on the disk since they are read from the PrntBoss\Logos folder and PrintBoss knows to confirm the matching encoded disk.

NOTE:

**The encoded file is created from the specific CD, but no file is written to the CD during the duplication process. If you would like the signature files on the CD, burn the signature files to the CD before following the signature disk duplication process.

✓ **Most CDs are not formatted, resulting in an error message generated from PrintBoss. Burn the signature file onto the CD prior to the duplication process to eliminate this error message.**

ADDING A PASSWORD TO AN EXISTING PRINTBOSS SIGNATURE DISK

A password may be added to an encoded PrintBoss signature disk. Users will be prompted to enter the password before PrintBoss accesses the disk. Adding a password is similar to the process of duplicating a disk except the existing disk is used for both the source and destination.

1. Open the PrintBoss Master Application.
2. Click on the **Utilities** menu and select **Install Modules**.
3. Select the Signature Disk Duplication tab.
4. Enter the PrintBoss **Master Password** as defined under *Option / Security*.

5. Click on the active **1** button requesting the password or installation disk. The 1 will fade and 2 will become active.
6. Insert the existing PrintBoss disk and the **Source Signature Disk**.
7. Enter the correct drive letter for the Source Signature Disk.
8. Click on the active **2** button.
9. Select the **Use Password** check box on the right side of the screen. Enter the **Password** in the field provided under the check box.
10. Enter the same drive letter for the **Destination** as the Source drive.
11. Click on the active **3** button.
12. PrintBoss will warn the source and destination disks are the same. The only change will be to add/edit the signature indicated.
13. Click **OK**.
14. Click **Done** when you are finished.

CREATING NON-ENCRYPTED SIGNATURE DISKS

PrintBoss reads BMP (bitmap), JPG, PCX, and PICT files. Scan a signature and save it as one of these formats. PrintBoss can print color (BMP) bitmaps, JPGs, and PICTs. Color signatures will print in shades of gray when printing to a printer using MICR toner.

Save the scanned file onto a disk and reference the file in the appropriate Form File or Bank record. Be sure to reference the entire path and filename, not just the filename. For example, enter *A:\my_boss.bmp* in the appropriate Form File or Bank record.

Make sure the disk with the signature file is in the specified drive before printing checks to PrintBoss. An error will pop up (unless that option has been turned off in the Pic Command Properties dialog for the form) when checks are printed and the signature disk is not in the specified drive.
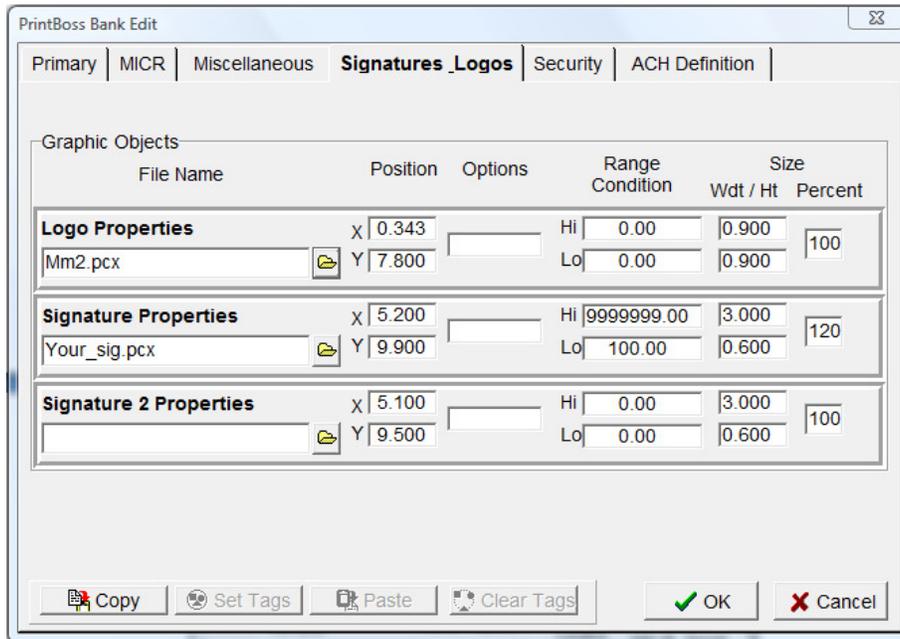
ADDING A SIGNATURE TO A CHECK FORM

Signatures must be referenced by the PrintBoss form in order to print on a check. Add a #PICT command referencing the signature file to each form that prints the signature (such as AP and Payroll). Add a second #PICT command if you need to print two signatures.

If the same signature is used for every bank account, the signature file name and path can be added directly to the #PICT command on the form. Otherwise, add the signature file name to the PrintBoss bank record and add the variable name associated with the field in the bank record containing the signature file name to the #PICT command.

PrintBoss provides sample signature commands near the bottom of the Footer Objects tab on all standard forms.

1. Locate the **PrntBoss Home directory**. You can determine the location by clicking on the PrintBoss **Help** menu and choosing **About**. The location for Home is listed under the **Directories** section towards the bottom of the window.
2. Copy your signature files, including *.sig encrypted signature files, into the Logos folder in the PrntBoss Home directory.
3. Open the PrintBoss Master Application.
4. Add the Signature File
   a. Bank Record
      i. Click on the **Edit** menu and select **Bank List**.
      ii. Select the appropriate Bank record and click the **Edit Bank** button.
      iii. Select the **Signatures_Logos** tab.

PrintBoss Bank Edit

Primary | MICR | Miscellaneous | **Signatures _Logos** | Security | ACH Definition

Graphic Objects

File Name	Position	Options	Range Condition	Size Wdt / Ht	Percent

Logo Properties
X 0.343   Hi 0.00   0.900   100
Mm2.pcx   Y 7.800   Lo 0.00   0.900

Signature Properties
X 5.200   Hi 9999999.00   3.000   120
Your_sig.pcx   Y 9.900   Lo 100.00   0.600

Signature 2 Properties
X 5.100   Hi 0.00   3.000   100
Y 9.500   Lo 0.00   0.600

Copy | Set Tags | Paste | Clear Tags | ✓ OK | ✗ Cancel

iv.   Click on the browse button next to the **Signature Properties** field. PrintBoss automatically opens the Logos folder in the PrntBoss home directory. You may browse to a different location if your files are not in this folder.
v.   Select the desired signature and click **Open**.
vi.   Repeat for **Signature 2 Properties** if two signatures may appear on the check.
vii.   Set a **Hi Range Condition** if desired. For example, enter 5000.00 if the signature should not print when the check amount exceeds $5,000.
viii.   Set a **Lo Range Condition** if desired. For example, enter 4999.99 if Signature 2 only prints when the check amount is $5,000 or more.
ix.   Click **OK** to save the values and exit the PrintBoss Bank Edit window.
x.   Click **Done** to exit the PrintBoss Bank List.
b.   Form File
i.   Click on the **Edit** menu and select **Form Files**.
ii.   Select your form from the list and click the **Editor** button.
iii.   Select the **Footer Objects** tab.
iv.   Scroll to the bottom of Footer Objects and locate the Sample Signature section.
1.   Use the command starting with **#PIC** to add a signature file directly to the form. Remove the pipe symbol (|) if it appears before the # sign to activate the command.
2.   Use the command starting with **#[FileExists** if you added the signature file through the bank record.
5.   Double click on the appropriate command in the Footer Objects window. The **Pic Command Properties** dialog opens.
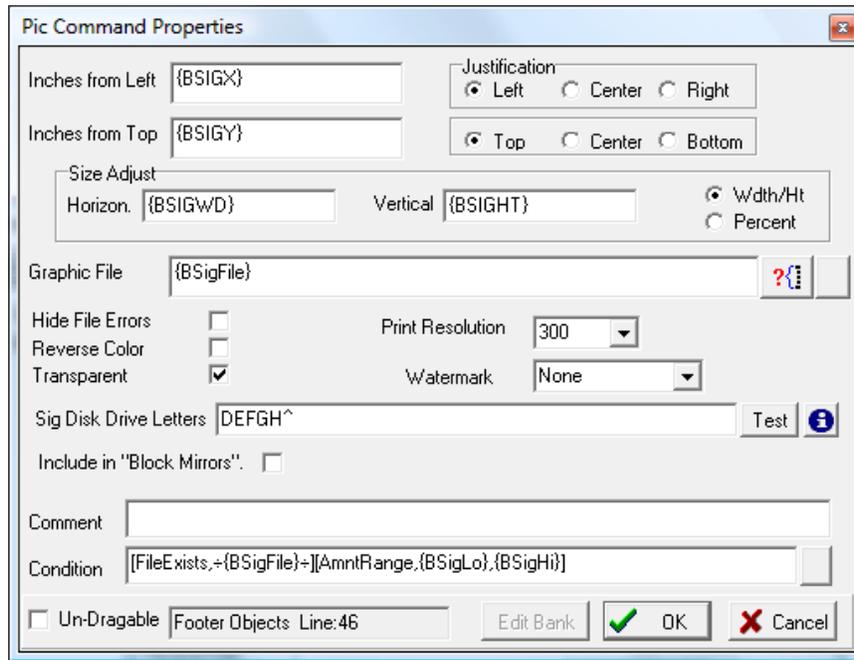
6. Enter appropriate values into the fields.
    a. **Inches from Left** – Enter the inches from the left side of the page to begin the signature file.
        i. Enter **{BSIGX}** to reference the value associated with the field in the Bank record.

NOTE:

Click the **Edit Bank** button at the bottom of the Pic Command Properties dialog to change this value. DO NOT enter a specific value in place of the {BSIGX} variable. This may adversely affect other signatures files using this same form.

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        ii. Enter **{BSIG2X}** to reference the value associated with Signature 2 in the Bank record.
    b. **Inches from Top** – Enter the inches from the top of the page to the top of the signature file.
        i. Enter **{BSIGY}** to reference the value associated with field in the Bank record.
        ii. Enter **{BSIG2Y}** to reference the value associated with Signature 2 n the Bank record.
    c. **Size Adjust**
        i. **Wdt/Ht** – Enter the values for the width and height of the signature file to size the width differently than the height.
            1. Enter **{BSIGWD}** and {**BSIGHT}** to reference the values associated with the width and height in the Bank record.
            2. Enter **{BSIG2WD}** and {**BSIG2HT}** to reference the width and height values associated with Signature 2 in the Bank record.
        ii. **Percent** – Enter the percent value to adjustment the horizontal and vertical size of the signature file.
            1. Enter **{BSIGSIZE}** to reference the associated with the Bank record. The variable is the same for the width and height.
            2. Enter **{BSIG2SIZE}** to reference the value associated with Signature 2 n the Bank record. The variable is the same for the width and height
    d. **Graphic File**
        i. Enter the signature file name and path. Only the file name is required if the signature is located in the Logo folder of the PrntBoss Home directory.
        ii. Enter **{BSIGFile}** to reference the value associated with field in the Bank record.
        iii. Enter **{BSIG2File}** to reference the value associated with Signature 2 n the Bank record.

   e. **Sig Disk Drive Letters** – Enter the letter associated with the drive containing the signature disk if this is an encrypted file. A series of letters may be entered if there is more than one possible choice, such as DEFG.
   f. **Condition** – Enter any required conditions. The example above prints the signature file if it exists and if the check amount meets the range condition. The values for the range condition in this example are entered in the Bank record.
7. Click **OK** to save and close the Pic Command Properties window.
8. Click **OK** to save and close the Form Editor.

The signature is added to the form. Typically, placement for the signature is relatively close to the signature line. Signatures from a disk in the computer will appear in the View if there are no conditions on the signature. Amount conditions can be simulated in the View by entering a value in the Dollar field at the top of the window. (See Training Notes entitled *Form Files* – Modify From the Document View). Drag the signature to adjust placement or double click on the signature to edit the properties, including size. Location and size will display as variables for signatures stored in bank records. It is best to make these adjustments to the bank record, though the variables can be overwritten by numeric values. Numeric values will overwrite the variables for all bank records, not just the currently selected bank record.

Repeat the steps for a second signature file. Be sure to change the coordinates when the dialog box opens so the second file does not print on top of the first.

📖   See Training Notes entitled *Form Files* for more information on the #PIC Command.

USING PRINTBOSS SIGNATURE DISKS

Follow the instructions sent with the secured signature or refer to the instructions above in the *Adding a Signature to a Check Form* section.

Make sure the disk is inserted in the drive before checks are sent to PrintBoss. An error will pop up (unless that option has been turned off in the **Pic Command Properties** dialog for the form) when checks are printed and the PrintBoss Signature Disk is not in the specified drive. The error allows the disk to be inserted into the drive before continuing or allows the user to skip the use of the disk and signature(s). The checks will print without the signature(s) when the disk is skipped.