

Upgrading to PRONTOSign™ from ERSS

Product Brief





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About AlphaTrust

We pioneered electronic signature solutions in 1998, and since then our solutions have processed millions of critical business transactions each year for satisfied customers in banking, insurance, financial services, and other industries. We are trusted by some of the largest enterprise, service provider, and consulting services companies globally.

Our solutions easily integrate with existing applications enabling high volume, digital transaction management to reduce costs and dramatically improve the overall customer experience while adhering to strict regulatory and compliance requirements.

Through continuous innovation we are delivering the most advanced and cost effective eSignature workflow orchestration solutions on the market.

To learn more, visit www.alphatrust.com and follow us on Twitter, LinkedIn and Facebook.

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Introduction

AlphaTrust is pleased to announce the upgrade from the existing PRONTO™ Server ERSS solution to the newer, more advanced PRONTO*Sign*™. Upgrading to PRONTO*Sign*™ provides a more robust and scalable solution for electronic signature workflow orchestration with high volume digital transaction management. Please note that the decision to upgrade to the new platform is a completely a customer decision as both platforms continue to be fully supported.

Introduced in 2001, PRONTO™ Server ERSS (ERSS) is designed for a single target use as an electronic signature engine for electronically signing individual documents when integrated into larger overall business processes. ERSS uses an older XML over HTTP API to enable integration with upstream applications.

Introduced in 2011 to meet the needs of the evolving e-signature market, PRONTO*Sign*™ is designed to function as a central workflow orchestration platform for service provider and enterprise applications to support more advanced use cases and higher volumes including:

- *Integrated Straight Through Processing (STP)* – PRONTO*Sign*™ provides an electronic process engine for managing single or multiple documents together as individual business transactions including features for electronic signature, secure delivery, disclosure/review acknowledgement, custom work flow steps, form filling data processing, and advanced authentication. PRONTO*Sign*™ is the next generation of PRONTO Server ERSS with significant new capabilities such as modern web service interfaces, full mobile platform support, multi-language support, and support for complex work flows.
- *Process Design and Deployment* - Design and orchestrate document-centric business transactions using “no code” tools. The target user is the business analyst or process engineer. Using our Process Designer tools, the business analyst / process engineer can design and deploy repeatable business processes that make use of the features of the process engine without requiring integration with other systems or the use of developer resources.
- *Ad Hoc Document Signing* – Provides an end user Web portal allowing regular business users to send any document for signature and/or data collection, design simple template-based processes, use processes created in process Designer, and monitor the status of their transactions. The target user is the desktop or mobile knowledge worker. Users may be organized into groups and hierarchies for aggregated monitoring and reporting.

This upgrade provides many new capabilities, which have been outlined within the “Technical Product Comparison” section of this document. A few of the key benefits have been highlighted below:

- A superior new user experience:
 - Multi-language support with easy addition of virtually any language
 - Support for mobile smartphones and tablets with “finger signature” capability
 - 100% responsive UI design to adapt to all screen sizes
 - Allows complete and easy customization of all UI elements
- 100% reuse of existing customer development on the PRONTO™ Server ERSS platform
- Output of certified documents using digitally sealed PDF files
- Current product platform with continuous feature development and improvements

The upgrade to the PRONTO*Sign*™ utilizes the new Installation Wizard, which provides an automated conversion experience with reduced time and minimal effort.

Please note that both the PRONTO™ Server ERSS and PRONTO*Sign*™ are available today and are fully supported products by AlphaTrust. Current customers may remain on ERSS or upgrade to PRONTO*Sign*™. The purchase of additional PRONTO™ Server ERSS licenses is only available to existing ERSS customers as ERSS has been in maintenance mode since the introduction of PRONTO*Sign*™.

Technical Product Comparison

The following table outlines the key features of both product sets and the primary benefits of PRONTOSign™ features (based on the product release 4.20 feature set):

Feature Comparison	PRONTO™ Server ERSS	PRONTOSign™	Key Benefits of PRONTOSign™ versus PRONTO™ Server ERSS
ARCHITECTURE, DEVELOPMENT, & DEPLOYMENT FEATURES:			
Architecture	Microsoft single threaded COM architecture front ended by classic ASP Web Pages	Microsoft multi-threaded .Net 4.5.2	Better security, scalability, performance, and integration options.
Application Interface Integration (API)	POX (XML over HTTP), REST	SOAP (WCF 4.5.2) Full set of Web Service Functions	Uses modern Web services for faster and deeper integration with modern development tools (WS-I and WS-* protocols). Full WSDL and Metadata endpoints. Enhanced security and deployment options. Legacy support for POX and REST is maintained.
API Backward Compatibility	N/A	COM and XML APIs from ERSS fully compatible	All integration code written for ERSS will continue to transparently run on PRONTOSign™. Many clients upgrade their ERSS server(s) in place and the integrated applications continue to function as before, but using the enhanced user experience of PRONTOSign™.
Documents per Transaction	1	100 ⁽¹⁾	Many business transactions consist of multiple documents. These can now be grouped, managed and reported on in single transactions that can be logically mapping to a paper-based transaction.
Participants per Transaction	NO (no 'participant' model in ERSS)	100 ⁽¹⁾	Independent 'participants' are a key new construct that allows users to accomplish multiple tasks across multiple documents within a single or multiple sessions. In PRONTOSign™, participants may be managed and updated via UI or API.
Wrapped and Auto-Fit Signatures	NO	YES	Many forms and documents have constrained space for signatures, especially regulated documents whose formats must be approved. PRONTOSign™ supports wrapping and auto-fitting signatures into defined spaces or signature boxes with automatic adjustments for sizing and wrapping to avoid signature overflow or

			legibility issues.
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ARCHITECTURE, DEVELOPMENT, & DEPLOYMENT FEATURES (CONTINUED):

Secure Document Delivery	YES	YES	Provide secure and authenticated delivery of documents containing personal or sensitive information.
Queued Event Notification System	NO	YES	A flexible and fault tolerant queue-based app-to-app event system, which will notify your applications of events occurring within transactions (participant, task, document and transaction events). Eliminates polling.
Update an in-process transaction	NO	YES	New functions include add new documents, replace documents, add new participants, reassign participants, add or update user tasks (i.e. signatures) for an in process signing transaction.
Optional Documents	NO	YES	One or more documents in a transaction may be optional (i.e. may be skipped by a user)
Optional Signatures	NO	YES	One or more signatures may be designated as optional and skipped by a user, if not needed.
Real Time Transaction Expiration	NO	YES	Fine-grained control (down to the second) as to when transactions expire if not completed.
Developer Testing Tools	NO	YES	Productivity tools for developers
System Users	YES (100 user limit)	YES (no user limit)	No user limit with PRONTOSign™ (note: participants in transactions (i.e. signers) do not need to be system users. System users have access to PRONTOSign™ tools and features.
Scalability	Horizontal (2) servers (2 CPUs each)	Horizontal and Vertical	More flexible scaling options as use grows.
Supported OS	Windows Server 2008, Windows Server 2008 R2	Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2	

DESIGN AND ADMINISTRATION TOOLS:			
Process Workflow Creation Utility (Process Designer)	NO	YES	Permits the design of work processes and templates via “no code” tools. Quick deployment of stand-alone business processes.
PDF Template Store Utility	NO	YES	Web tools to add PDF form templates to an account and manage the use of form templates.
Web-Based Data Collection Utility	NO	YES	A lightweight form creation and collection toolset to gather form data and merge the data into documents as part of work processes.
Email Template Editor Utility	NO	YES	Fully customize all your email templates with an easy to use editor.
Account and Sub-Account Management Utility	NO	YES	Organize system users into groups and hierarchies that match your organizational needs. Reporting can “roll up” the chain so managers can see their organization’s tasks and progress.
System User Management Utility	Very Limited	Enhanced	Easy creation and updating of system users.
USER EXPERIENCE:			
Multi-Language Support	NO (Latin characters only)	YES (Unicode)	All UI text and control elements (i.e. buttons) support multiple languages, including auto-detection of preferred browser languages. Any language not available out of the box can be added with simple configuration changes. Signatures and data merging in any language (Unicode) are supported.
Full UX Customization	Very Limited	FULL	In addition to the header/footer customizations in ERSS, PRONTOSign™ includes the ability to fully customize the look, style and actual text of any standard PRONTOSign™ UI page for a completely customizable user experience.
Responsive Design	NO	YES	All user interface screens for review and signing processes are based on “responsive design” so that they automatically adapt to the device type users are using (desktop, tablet, or phone). Layout is optimized for touch interfaces.
Touch device “finger-drawn” signatures	NO	YES	“HTML5” support for touch screen input devices such as smart phones and tablets. This will permit finger drawn or stylus drawn “hand-written” signatures using touch devices.

USER EXPERIENCE (CONTINUED):			
Smartphone and Tablet Support	Very Limited	YES	Sign using modern mobile phone platforms (iPhone/iPad, Android, Windows Phone, Blackberry)
User Signing Queue	NO	YES	Log in and see an "inbox" of documents pending a user's signature or other processing need.
Upload Documents During a Signing Session	NO	YES	Require users to upload documents as part of the work process (i.e. receipts, scanned documents, corporate papers, photos, etc.)
AUTHENTICATION, COMPLIANCE, AND SECURITY:			
Audit Trail	Very Limited	Enhanced evidence package	Additional audit detail around transactions, participants, and documents
Certified Documents	NO	YES	Output PDF documents are digitally sealed to create long-term, self-validating, tamper-evident documents that significantly reduce downstream risk due to post-transaction alteration of documents. ⁽²⁾
Authentication: Email Response	YES	YES	Continued support
Authentication: Transaction specific PIN or password	YES	YES	Continued support
Authentication: Knowledge-based Authentication (KBA) for transaction participants	Experian Authentication Services (AS1, AS2, and AS3) only	Experian Authentication Services and Experian Precise ID full integrations	Experian® PreciseID has been added as second KBA choice, in addition to the older Experian AS services.
Authentication: Single Sign On (SAML / Claims-based) for transaction participants and system users	NO	YES	Authentication and integration with LDAP/Active Directory/SAML systems in support of single sign on.
Block User after invalid Login Attempts	NO	YES	Blocks users from login for a configurable time after failed authentication attempts.
Application IDS – Intrusion Detection System	YES	IMPROVED	Blocks requests from IP addresses that make repeated invalid requests. Parameters of the IDS are configurable.

TRAINING AND PROFESSIONAL SERVICES:			
Training Onsite Offering	NO	YES	Subject Matter Expert (“lead the leader”) program for internal champions – greatly enhances ROI and use case adoption.
Professional Services Offering	NO	YES	Full range of planning, integration, training, and deployment support options.
LICENSING:			
Licensing Terms	Licensed by CPU core	Can be licensed by annual volume of documents processed.	Ask AlphaTrust for addition details.

- ⁽¹⁾ Higher limits on documents and participants per transaction are available. Ask AlphaTrust for additional details.
- ⁽²⁾ Certified documents (recommended) require the additional third party components. Ask AlphaTrust for additional details.

Summary

Upgrading to PRONTO*Sign*™ provides you with the ability to take full advantage of the new functionality provided with no impact to your existing application development on your current platform. AlphaTrust believes this new functionality will provide significant value to you and your evolving product portfolio, however the decision to upgrade to the new platform is completely a customer decision as both platforms continue to be fully supported.

For more information, please contact your AlphaTrust representative. AlphaTrust looks forward to helping you evolve your product portfolio with the most cost effective and highest performance electronic signature workflow orchestration solutions available.

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