

Be Sure Your PDF Files Are Secure

In this White Paper, the Investintech.com Inc. Team describes how you can ensure that your PDF files are created securely. To find out more, please feel free to contact Investintech at 416-920-5884 or on the web at www.investintech.com.

The Portable Document Format (PDF) is a file format that is frequently noted for its security. However, what many do not take into consideration when creating their PDF files, is that not all PDFs are created equally. In fact, there are several different ways that PDFs can be created - some secure, others not. Simply creating a PDF document does not mean that it is secure enough to prevent data extraction, manipulation or other misuse.

The purpose of this white paper is to educate users on how, as authors of PDF documents, they can ensure that when they seek to create a secure PDF document, they will actually do so.

When a PDF has been properly secured, users can be 100% confident that the contents of the PDF will retain their integrity. To truly secure a document and ensure that it is protected from misuse, it is necessary to specially encrypt the PDF at creation. When created properly, a secure PDF will have these important advantages:

The Advantages of Secure PDFs

- ▶ Determine who views the PDF File.
- ▶ Prevent data and graphics extraction, printing and other changes to the PDF without permission.
- ▶ Ensure that data integrity is maintained.

Step-by-Step Guide to Creating a Secure PDF

There are a number of PDF creation software options available on the market today. Many of the leading PDF companies, such as Adobe®, have the ability to properly secure PDFs at creation. Conversely, there are also many PDF creators out there do not have these necessary features.

The following outlines the steps that must to be taken in any PDF creation software to ensure proper PDF security. For illustration purposes, we will use the Sonic PDF Creator as an example software that lets users create secure PDFs.

SONIC PDF CREATOR

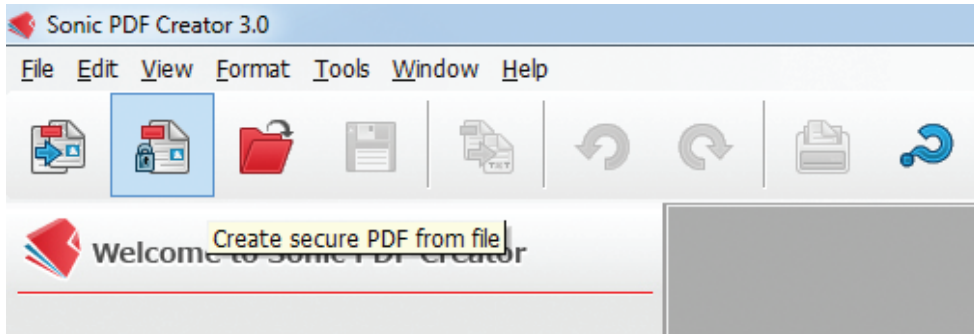


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Starting the Creation

To start the secure PDF creation process, the user must first determine where the PDF creation is initiated from (it could be from the print driver or through an interface) and locate the menu or button with the PDF encryption options.



For example, the Sonic PDF Creator uses an interface to initiate the PDF encryption process.

Passwords

When creating a PDF, using password security can achieve such things as preventing a document from being opened, printed, or edited. PDF documents that include such security restrictions are generally termed restricted documents.

A PDF document can have two kinds of passwords: a **Document Open** password and a **Permissions** password. When the Document Open password is set, anyone who tries to open the PDF document must type in the password specified. If the aim is to restrict printing and editing, a Permissions password should be set up.

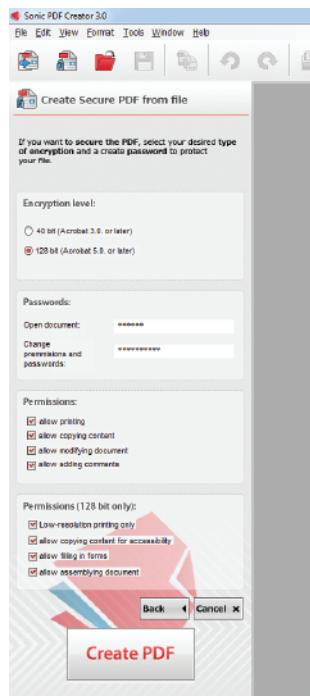
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Key Point: To ensure that the resulting PDF is fully secured, both passwords should always be filled in. If only the Permissions password is set, the user could, through the use of a certain type of software, potentially break the permissions and extract information. If both the Document Open and Permissions passwords are set, the encryption cannot be broken under any circumstance. Thus, the creator can be sure that the document has been secured.



Setting Permissions

The creator of the PDF document can designate a number of different permission, such as:

- ▶ Preventing users from printing the document.
- ▶ Setting “Low Resolution” prevent printing the document at good quality resolution.
- ▶ Setting “High Resolution” will allow users to print at any resolution, if it can be supported by the printer printing the document.
- ▶ Preventing the user from making any changes to the document.
- ▶ Inserting, Deleting, and Rotating Pages.
- ▶ Commenting, Filling in Form Fields, and Signing.
- ▶ Extracting Pages. Prevents users from changing the document using a variety of method specified in the options.

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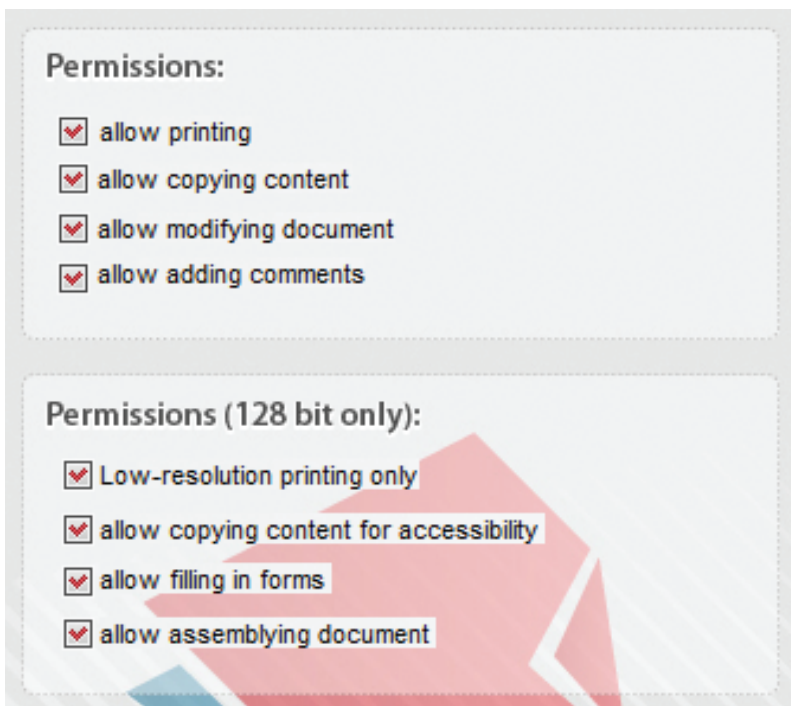
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The Sonic PDF Creator dialog allows users to set both the Document Open and the Permissions password.

Encryption Types

Most PDF Creators will offer the user two types of encryption settings – 40-bit and 128-bit. The 40-bit encryption is an older form of encryption that was offered in the earlier versions of PDF. The two most recent versions of PDF have adopted the 128-bit encryption method. If security and features are a priority - the more recent versions of PDF (i.e. Acrobat 5 or Acrobat 6) should be used, since they support 128 Bit encryption. The 40-bit encryption option should be selected when the recipient of the document may be working with an older version of the PDF specification.



The Sonic PDF Creator dialog gives users the option to create secure PDFs using either the 40-bit or the 128-bit encryption.

Completing The Secure PDF Creation

Once the above options have been designed, the author can then go ahead and complete creation of the PDF and can be confident that the resulting PDF is fully secure.

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