

# Signing Microsoft Office 2007 Documents

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CoSign® enables you to add digital signatures, as well as graphical signatures, to .docx and .xlsx Office 2007 documents using a special plug-in called **ARX Signature Line Provider**.

The basic signing process consists of placing signature placeholders (or signature fields) in the desired locations in the document, and signing each field. After signing, you can validate the signatures. Validation assures you that the document was not modified after it was signed and that a trusted CA approved the signers' certificates.

You can also activate the ARX Legacy Word Add-in when using Office 2007. For more information, refer to [CoSign Quick Guide: Signing in Microsoft Office 2000/XP/2003](#).

**Note:** To enable the plug-in, you must install the ARX CoSign Client and ARX's Microsoft Office (Word, Excel and InfoPath) client components. For Free Trial users these components are installed by default.

## Adding Signature Fields

Use the **Insert** tab's special **Signature Line** option to add a new signature field (Figure 1). To open the pull-down menu of the Signature Line, you must click the arrow icon ▾. From the pull-down menu, choose **ARX CoSign Signatures Add-in for Office**.

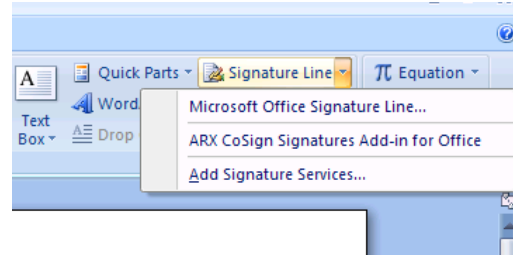


Figure 1: Selecting the ARX CoSign Signatures Add-in for Office

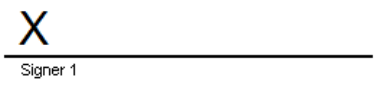


Figure 2: Creating a New Signature Field in a Document

A new signature field is generated and embedded inside the document (Figure 2).

You can perform several operations in this field using the right-click menu, as shown in Figure 3.

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The following two operations are relevant to an empty signature field:

- ▶ **Sign** - Performs the digital signature in the empty signature field. Refer to *Signing Empty Signature Fields* for a full description of the digital signature operation.
- ▶ **Signature Setup** - Refer to *Configuring Signature Settings*.

All other operations in the right-click menu are applicable to the empty signature field object and are standard Office 2007 operations for displayable objects.

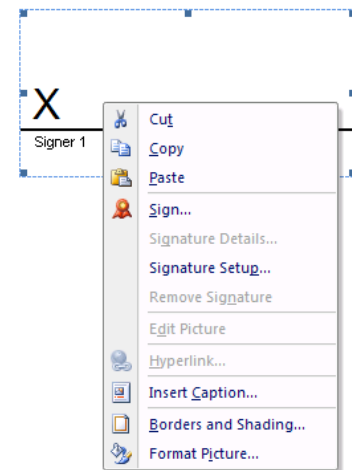


Figure 3: Signature Field Right-Click Menu Options

## Configuring Signature Settings

### General Settings

When you select **Signature Setup** from the right-click menu of a signature field (Figure 4), the *CoSign Signature Setup* dialog box appears with the **Settings** tab displayed.

This dialog box enables you to define several parameters of the signature field. Some of these parameters will be displayed in the signature field and others are used during future signature operations. The parameters include:

- ▶▶ **Suggested signer** - Name of the signer.
- ▶▶ **Suggested signer's title** - Role of the signer.
- ▶▶ **Suggested signer's e-mail address** - Email address of the signer.
- ▶▶ **Instructions to the signer** - Text displayed to the signer during the Sign operation.
- ▶▶ **Allow the signer to add reason in the Sign dialog** - If this option is selected, the signer will be able to add a reason. If you would like this reason to display in the signature field, check the **Show Reason** field in the **Advanced** tab.



Figure 4: CoSign Signature Setup - Settings Tab

### Advanced Settings

The **Advanced** tab of the *CoSign Signature Setup* dialog box (Figure 5) includes the following parameters:

- ▶▶ **Date and Time Format** - Sets the displayed format of the signature date and time.
- ▶▶ **Show** - Specifies whether to display elements in the graphical signature such as **Date and time**, **Reason**, **Signed by**, **Title**, and **Logo**.

A single graphical image can be displayed and you can select whether this graphical image is a regular graphical image or **Initials**.

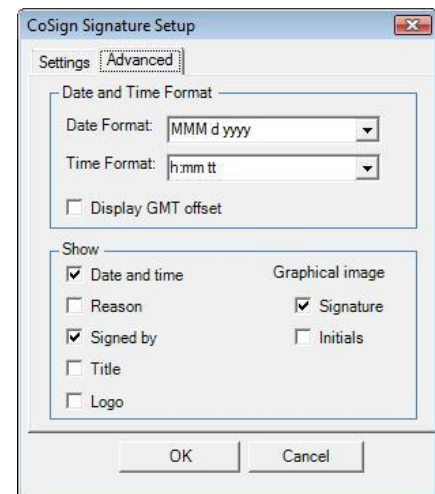


Figure 5: CoSign Signature Setup - Advanced Tab

## Signing Empty Signature Fields

You can sign the content of a document by right-clicking an empty signature field and selecting **Sign** from the right-click menu. After performing the Sign operation, the only additional change that can be made to the document is that additional users can sign empty signature fields that exist in the document.

To sign the content of a document:

- ▶▶ Right-click an empty signature field and select **Sign** from the right-click menu.

If you have more than one certificate or more than one graphical image, or are required to enter a reason/title for the signature, the *Sign with CoSign* dialog box appears (Figure 6).

- ▶ If the *Sign with CoSign* dialog box appears, fill in the following fields and then click **Sign**.

The dialog box may contain some or all of the following sections:

- ▶ **Select Image** - Clicking this button enables changing the graphical signature that will be embedded inside the digital signature. The display area of the window shows the current display of the digital signature. If the installation selection determined that the image should be initials, you will only be able to choose from the available initials.
- ▶ **Select Logo** - Clicking this button enables you to change the logo that will be embedded inside the digital signature. The display area of the window displays the current logo.
- ▶ **Change** - Clicking this button enables you to select the certificate to be used as part of the digital signature operation.
- ▶ **Reason for signing this document** - If entering a reason is required, select a reason from the predefined list or use a specific reason for this signature operation.
- ▶ **Add title** - If entering a title is required, enter the title of the signer.
- ▶ **Learn more about CoSign at** - This link directs you to the ARX web site for more information.

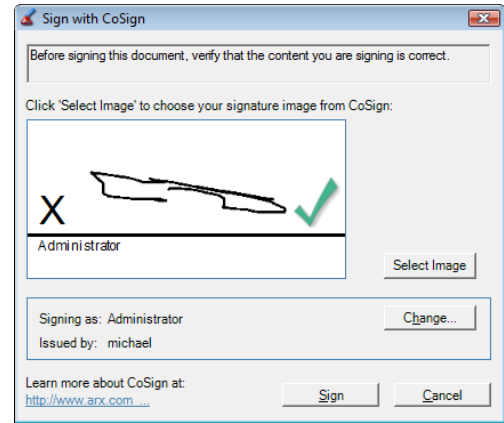


Figure 6: Signing with CoSign in Office 2007

## Viewing Digital Signatures

In an Office 2007 document (.docx or .xlsx file), the visual display of the digital signature indicates the validity of the digital signature. If an existing digital signature is invalid, it will be indicated in the document.

Figure 7 shows a sample output of a valid digital signature operation.

Figure 8 shows a sample of an invalid digital signature.

The following options are available when you right-click a signed digital signature field or in the Signatures pane to the right of the document (Figure 9):

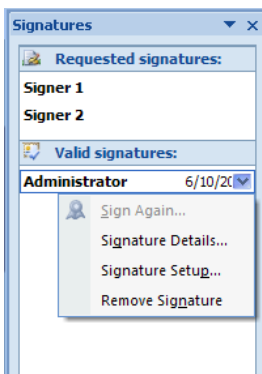



Figure 9: Signed Digital Signature Field Right-Click

- ▶ **Signature Details** - Displays information related to the digital signature and the signer's certificate (Figure 10).
- ▶ **Signature Setup** - Displays signature setup without the ability to modify the values. The fields you can view are described in *Configuring Signature Settings*.
- ▶ **Remove Signature** - Enables the user to remove the signature.

**Note:** The option *Sign Again* is not relevant for the ARX Signature Line Provider.

**Note:** To display the digital signatures list, either select the **Prepare/View signatures** option from the main icon of Office 2007, or select the digital signature seal indication in the lower left side of the Office window.

The digital signature seal indication appears only if there is a signature inside the document .

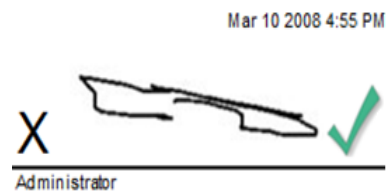


Figure 7: Valid Digital Signature



Figure 8: Invalid Digital Signature

## Validating Office 2007 Signatures

The following sections describe how a user who is not using CoSign can validate graphical signatures that were attached using CoSign in Office 2007. The digital signatures can be validated without having to install the ARX Signature Line Provider.

### Validating Graphical Signatures in Word Documents without Using the ARX Signature Line Provider

Using ARX Signature Line Provider for signing documents does not require your file recipients to install any plug-in for verifying the documents. This is useful if they receive documents from a company or organization that uses CoSign internally.

If the signer's certificate was created by a World Wide verifiable CA, your file recipients will not need to perform any action prior to the validation process.

To validate signatures:

- ▶ **CoSign Trial users:** Send the recipient of your file the following URL - <http://verify.arx.com/> - to download and install your ROOT CA Certificate.
- ▶ **Other CoSign users:** Obtain your organization's ROOT CA Certificate (.cer file) and then send to the recipient of your file to install.

*Note: If an external CA is used, or the CoSign certificate is based on a WorldWide verifiable CA, there is no need for your file recipients to install the ROOT certificate.*

*Note: An installation of a ROOT CA certificate is not required in a CoSign Desktop installation.*

- ▶ See if signature is valid (Figures 7, 8)

*Note: Although your file recipients are able to view the digital signature, they cannot activate the **Signature Settings** and **Signature Details** options. Microsoft Office will validate the digital signature and display the valid/invalid image according to the validity of the digital signature for them.*

## CoSign Signatures Toolbar (Ribbon)

The ARX Office 2007 Signature Line Provider includes a Toolbar (Ribbon) (Figure 11) that provides the following functionality:

- ▶ **Sign** - Performs a "One Touch Signing" operation. This option creates a new signature field in the cursor location and performs a signature operation on the new field. Refer to *Adding Signature Fields* and *Signing Empty Signature Fields* .
- ▶ **Add Signature Field** - Creates a new signature field in the cursor location. Refer to *Adding Signature Fields* .

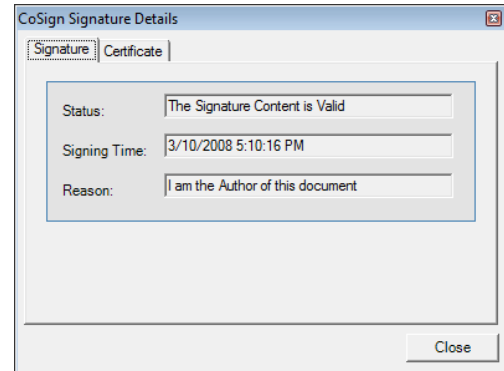


Figure 10: CoSign Signature Details-  
Signature tab

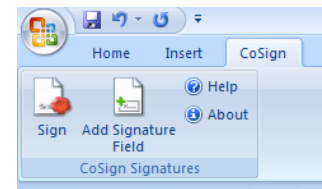


Figure 11: ARX Office 2007  
Signature Line Provider  
Toolbar (Ribbon)