

# CoSign® Quick Guide **Signing Microsoft® Office 2007/2010 Documents**

## Table of Contents

Getting Started	1
Creating and Signing a Digital Signature Field	1
Inserting a Digital Signature Field	2
Signing an Unsigned Digital Signature Field	2
Validating Digital Signatures	2
Clearing or Deleting Digital Signatures	3
Configuring Signature Settings	3
Validating Digital Signatures for Non-CoSign Users	4

CoSign enables you to add digital signatures and graphical signatures to Microsoft Office 2007/2010 documents (.docx and .xlsx).

## Getting Started

Once the CoSign client is installed, a **CoSign** tab is added to the menu ribbon. (Figure 1)

The CoSign tab includes the following options:

- » **Sign with CoSign** - Perform a "One Touch Signing" operation.
- » **Add Signature Field** - Create a new signature field.

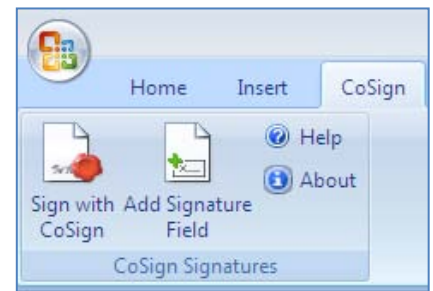


Figure 1: CoSign tab

## Creating and Signing a Digital Signature Field

You can create and sign a digital signature field in a single operation.

To create and sign a digital signature field:

- » Place the cursor on the desired location of the signature field.
  - » From the CoSign ribbon, select **Sign with CoSign**. (Figure 1) The Signing Ceremony dialog box appears displaying your default signature. (Figure 2)
- Note: The **Reason** and **Title** may also be displayed. Please refer to *Configuring Signature Settings - Advanced Settings* (page 4).
- » Click **Sign**. A new, signed signature field is created. (Figure 3)



Figure 2: Signing Ceremony Dialog Box

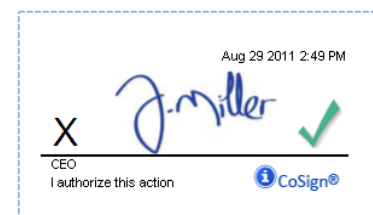


Figure 3: A Signed Signature Field

## Inserting a Digital Signature Field without Signing

It is possible to insert a digital signature field without signing it. This is useful when designing a document template.

To create a digital signature field:

- » Move the cursor to the desired location of the signature field.
- » From the CoSign ribbon, select **Add Signature Field**. (Figure 1)
- » A new signature field is created. (Figure 4)

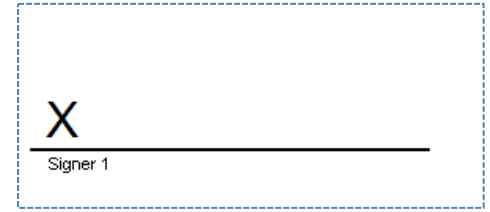


Figure 4: Creating a New Signature Field

## Signing an Unsigned Digital Signature Field

To sign an unsigned digital signature field:

- » Right-click on the digital signature field and select **Sign** from the drop-down menu. (Figure 5)
- » The standard Signing Ceremony dialog box appears displaying your default signature. (Figure 2)
- » Click **Sign**. A digital signature operation is performed and your signature appears. (Figure 3)

Note: After you perform the Sign operation, other users may sign unsigned signature fields remaining in the document. However, any changes made to the content of the document will invalidate all signatures.

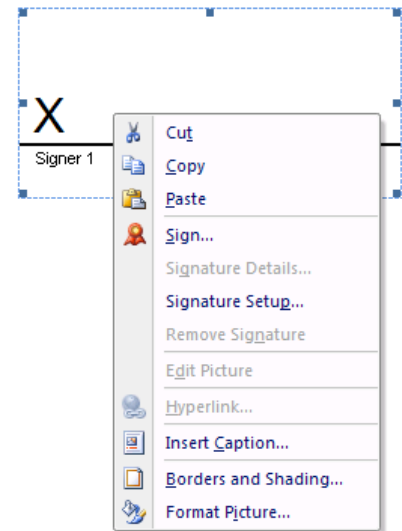




Figure 5: Digitally Signing a Signature Field

## Validating Digital Signatures

In an Office 2007/2010 document (.docx or .xlsx), the visual display of the digital signature indicates the validity of the digital signature.

- A green check  indicates a valid signature.
- A red "X"  indicates an invalid signature.

To validate a signature:

- » Right-click the signature and select **Signature Details** from the drop-down menu.
- » The *CoSign Signature Details* display information related to the validity of the signature, as well as information regarding the signer's certificate. (Figure 6)

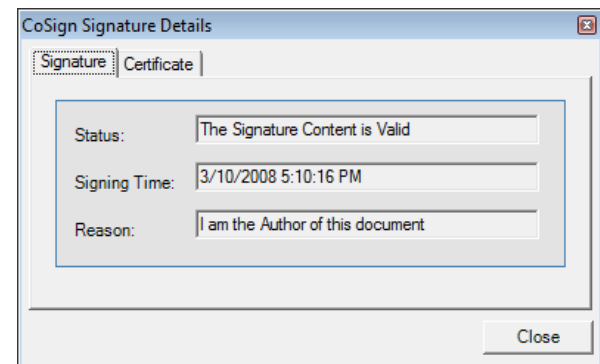


Figure 6: CoSign Signature Details

## Clearing or Deleting Digital Signatures

You may wish to delete existing digital signatures or signature fields.

To clear a digital signature from a signature field:

- » Right-click the signature field and select **Remove Signature** from the drop-down menu. (Figure 7)
- » The digital signature is cleared from the signature field. The signature field itself remains intact.

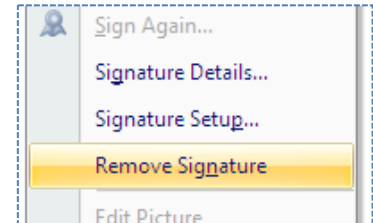


Figure 7: Remove Signature

To delete a signature field:

- » Select the signature field and click **Delete** from your keyboard.
- » The signature field is deleted from the document.

## Configuring Signature Settings

The **Signature Setup** allows you to define the parameters of an empty signature field and future signature operations, as well as configure the appearance of the signature.

- » Right-click on the signature field and select **Signature Setup**.
- » The *CoSign Signature Setup* dialog box appears. (Figure 8)

### Settings

The **Settings** tab (Figure 8) allows you to:

- » Specify the name of the signer (**Suggested signer**), role of the signer (**Suggested signer's title**), and email address of the signer (**Suggested signer's e-mail address**) to be displayed within the empty signature field.
- » Display **Instructions to the signer** during the signing 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 for signing the document, such as: "I am the author of this document."

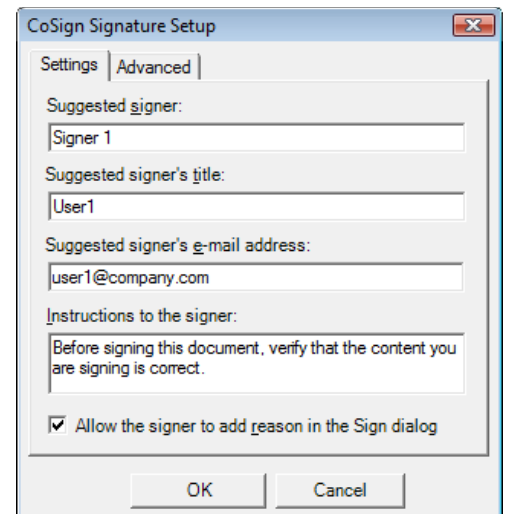


Figure 8: CoSign Signature Setup - Settings Tab

## Advanced Settings

In the **Advanced** tab (Figure 9) of the *CoSign Signature Setup* dialog box, you can configure the **Date and Time Format** and signature appearance:

- » **Date and Time Format** - Sets the format of the signature date and time.
- » **Show** - Specifies which elements of the signature to display, such as **Date and time**, **Reason**, **Signed by**, **Title**, and **Logo**. You may also specify whether the **Graphical image** of the signer will appear as **Signature** or **Initials**.

Note: In order for the **Reason** to be displayed, be sure to check **Allow the signer to add the reason in the Sign dialog** within the *Settings* tab (Figure 8).

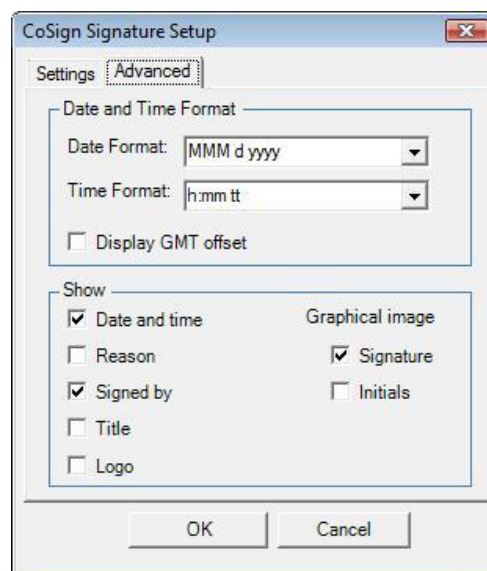


Figure 9: *CoSign Signature Setup - Advanced Tab*

## Validating Digital Signatures for Non-CoSign Users

Anyone can validate a CoSign signature, regardless of whether they have CoSign installed.

- » If the recipient of your signed document is a non-CoSign user, you first need to obtain your organization's ROOT CA Certificate (.cer file) and send it to them for installation. Refer to the [CoSign v5.4 User Guide \(Chapter 2: Installing the ROOT Certificate for Validation Purposes\)](#) for more information on installing a ROOT Certificate.

Note: If an external CA is used, or the CoSign certificate is based on a Worldwide verifiable CA, there is no need for the recipient to install the ROOT certificate.

- » Once the recipient has installed the ROOT Certificate, they may validate your signature by right-clicking on the signature and selecting **Signature Details**.

For a more detailed description of signing Microsoft Office 2007/2010 documents, please refer to the [CoSign v5.4 User Guide \(Chapter 5: Signing Office 2007/2010 Documents - New Document Style\)](#).