

CoSign® Quick Guide **Signing Microsoft® Office 2000/XP/2003 Documents**

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CoSign enables you to add digital and graphical signatures to Word and Excel® documents in Office 2000, XP, 2003, 2007 and 2010.

CoSign Menu Options


Once installed, a **CoSign** menu is added to the menu bar of the Office application. (Figure 1)

From the **CoSign** menu, you may:

- » Sign a document.
- » Add Signature Field.
- » Enter **Design Mode** to change the size, location or layout of the signature field.
- » **View, Validate or Clear All Signatures.**
- » Configure the default appearance and general signature settings of a newly created digital signature (**Configure Signature Defaults**).

Creating and Signing a Digital Signature Field

To create a signature field:

- » Open the document you wish to sign.
- » Position the cursor on the desired location of the signature field and select **CoSign** →  **Add Signature Field**.
- » The signature field appears on the document.

To sign a signature field:

- » Right-click the signature field and select **Sign** from the drop-down menu.
- » You may be prompted to enter your user name and password.
- » The standard Signing Ceremony dialog box appears. Select or enter the relevant information.
- » Click **Sign**. The signature field is digitally signed.

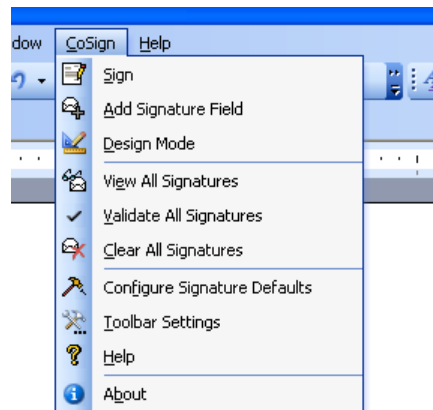





Figure 1: CoSign Menu

Validating Signatures

To validate a signature:

- » Right-click the signature and select **Validate** from the drop-down menu.
 - A green check  indicates a valid signature.
 - A red 'X'  indicates an invalid signature.
 - A yellow question mark  indicates a signature that has not yet been validated.


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 **Clear** from the drop-down menu.
- » The digital signature is cleared from the signature field. The signature field itself remains intact.

To delete a signature field:

- » Switch to **Design Mode** by clicking  on the toolbar or selecting CoSign → Design Mode.
- » Select the signature field and click **Delete** from your keyboard.
- » The signature field is deleted from the document.

Word Specific Signing Features

CoSign allows users to generate two content-based types of signatures in Word documents, in addition to the file-based signature:

- » **Document content signature** - This is the default signature type. This signature signs the entire textual and visible content of the document, but not the entire file. This mode is recommended in document management systems to avoid file access or network access to the document file.
- » **Section based signature** - Section-based signatures sign only the content of a specific section in the document. This functionality is useful for Word documents that are based on workflow operations. Using section-based signatures, each signer edits and signs a specific section, in no way affecting the signatures on other sections of the document.

Excel Specific Signing Features

In Excel, only content-based signatures are supported. File-based signatures are not supported. You can select both the scope (workbook, active sheet, or selected area) and the content within the scope that will be signed.

The different scopes include:

- » **Active sheet** - All the relevant content in the active sheet will be signed. Any change in the relevant content within the active sheet will invalidate the signature, while any change in other sheets will have no effect on the signature. This is the default value.

- » **Workbook** - All the relevant content in each of the workbook's sheets will be signed. Any change in the relevant content within any sheet of the workbook will invalidate the signature.
- » **Selection** - Only the relevant content in the cells of the selected area will be signed. Any change in the relevant content of any of the selected cells will invalidate the signature, while any change in other cells will have no effect on the signature. You must select the cells before signing the signature field, and you can only sign a single continuous selection, not multiple selections.

*Note: To view which selected area a specific signature applies to, right-click the signature field and select **Show** from the right-click menu. The signed cells are highlighted.*

The different values for the signature content include:

- » **Cell Values** - The values of the cells will be signed.
- » **Cell Formula** - The cell formula will be signed.

Note: Cell formulas may have dependencies on other unsigned cells. Even if the values of these cells change and cause the selected cell value to change, the signature remains valid as long as the cell formula remains the same.

- » **Cell Properties** - Cell properties, such as font name, font style (indicating whether the text is bold or italic), font size, hide row, and hide column, can be signed.

Modifying Documents Containing Digital Signatures


Modifying the signed data in a Word or Excel document invalidates all its relevant signatures (depending on the signature scope) and an **X** is displayed in each invalidated signature field.

If you attempt to save a file-based signed Word document that is modified, the following message appears: **Saving will remove all digital signatures in the document. Do you want to continue?** To delete the file based signatures and save the document, click **Yes**.

Using Design Mode

Design mode enables you to change the size, location, and layout of the signature field, as well as delete a signature field.

To use Design Mode:

- » Click  on the toolbar, or select **CoSign** → **Design Mode**.
- » Within Design Mode:
 - Modify the field's location by selecting the signature field and moving or resizing the field.
 - Modify the field's object's format:
 - In Word, you can change the field's size and layout. Right-click the signature field and select **Format Control**. The *Format Control* dialog box appears (Figure 2).

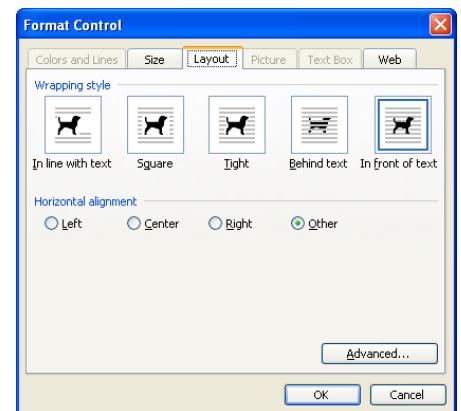



Figure 2: Word's Signature Field Format Control Dialog Box

- Use the **Layout** tab to specify the layout settings of the signature field.
 - Use the **Size** tab to specify the size settings of the signature field.
 - In Excel, you can change the field's colors and lines, size, and properties. Right-click the signature field and select **Format Object**. The *Format Object* dialog box appears (Figure 3).
 - Use the **Colors and Lines** tab to specify the color and line settings of the signature field.
 - Use the **Size** tab to specify the size settings of the signature field.
 - Use the **Properties** tab to specify the positioning and printing options of the signature field.
 - Delete the signature field by selecting the field and pressing **Delete** on your keyboard.
- » When you finish modifying the signature field, click  again to toggle out of Design Mode.

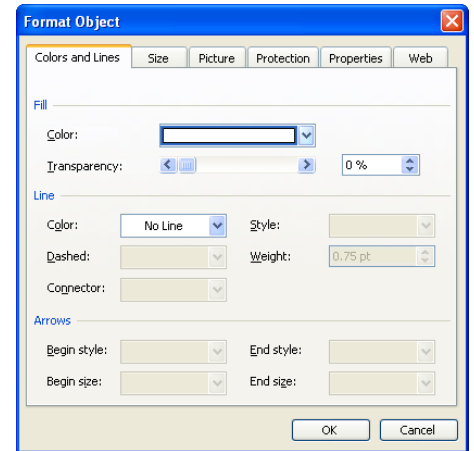


Figure 3: Excel's Signature Field Format Object Dialog Box

Validating Digital Signatures for Non-CoSign Users

The following sections describe how a non-CoSign user can validate CoSign digital signatures.

Anyone can validate a CoSign digital 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 **Validate**.

For a more detailed description of signing Microsoft Office 2000/XP/2003 documents, please refer to the [CoSign v5.4 User Guide \(Chapter 5: Signing Word and Excel Documents - Office XP/2003 Style\)](#).