ePadLink®

IntegriSign Desktop User Manual

Version 13.2

ePadLink®
IntegriSign Desktop User Manual

Table of Contents

ePadLink®
IntegriSign Desktop User Manual

Table of Contents

ePadLink®
IntegriSign Desktop User Manual

1.0 – Introduction and Installation

An IntegriSign plug-in allows you to create a document and sign it electronically with your handwritten signature using a Signature Capture Device. The plug-in facilitates:

1. **Signature Capture** - The signature trace is captured and stored on the electronic document in a signature object.

2. **Content Hashing** - The signature object is bound to the contents of the document such that any alteration of the document after signing it would render the signature invalid.

3. **Document Verification** – The document can be verified to ensure its integrity (i.e., confirming that it has not been tampered) after the act of signing.

1.1 – Before You Begin

1. IntegriSign Desktop runs on Windows 7 operating systems and later.
2. Your system should have a minimum of 50 MB free space on the hard drive, in addition to the free space requirements for Windows.
3. Before installing a new version of IntegriSign Desktop, uninstall any older versions of IntegriSign Desktop on your machine.
4. Close all the applications running on Windows.

1.2 – Installing the ePad Device

Refer to the manual provided by ePadLink for instructions on installing the device. Check if your computer recognizes the ePad.

1.3 – Uninstalling IntegriSign Desktop

To uninstall IntegriSign Desktop, go to "Start – Settings - Control Panel - Add/Remove" programs. You will find IntegriSign Desktop listed; select IntegriSign Desktop, and follow the instructions to uninstall the software.

Signatures that have been placed into documents are not removed during uninstallation.

Note: Deleting the IntegriSign Desktop installation folder directly will not uninstall the software completely.

2.0 – IntegriSign Desktop Preferences

The IntegriSign Desktop Preferences window can be invoked from "Start – Programs – IntegriSign Desktop – Desktop – Preferences Manager". IntegriSign Desktop Preferences facilitates the creation of profiles using the "Create" button.
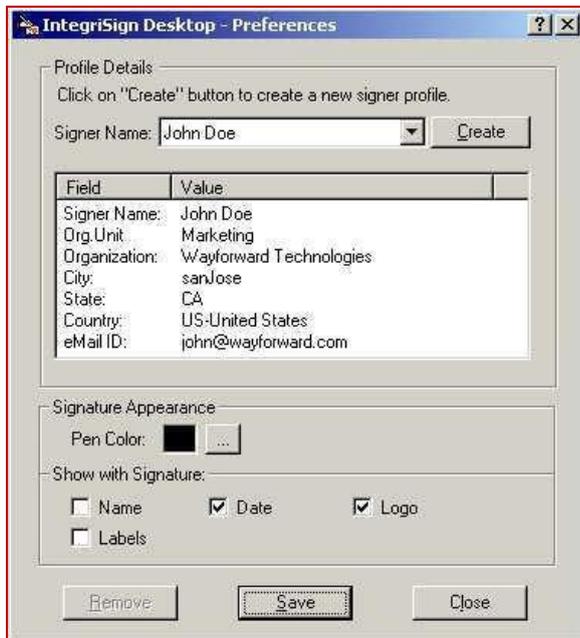
2.1 – IntegriSign Desktop – Configuration

"Pen Color" and other details to be displayed along with the signature like "Name", "Date", "Logo", and "Labels" for a public signer (no profile users) can be preset before creating a profile in the "IntegriSign Desktop - Desktop Configuration" window ("Start – Programs – IntegriSign Desktop – Desktop – Desktop Configuration").

You can also choose if "Anti-Aliasing" (technique used for signature smoothing) or "Thickness" needs to be used for signature drawing in documents. If "Thickness" is used, thickness value can be set.

The size of the signature placeholder can be preset using the "Custom Signature Size" setting option from the "IntegriSign Desktop - Desktop Configuration" window. The default signature placeholder size is Width – 180 and Height – 110.

The "Background Logo" option lets a user select the image that will be used as the logo to be displayed behind the signature. The width and height of the logo selected should not be more than 180 and 110 respectively.

The "Signature Processing" section lets the user enable or disable white space removal for signatures and, if enabled, to specify the maximum enlargement factor. By default, the "White Space Removal" option is enabled (checked) and the "Maximum Enlargement Factor" is set to 1.25.

After signing on the signature pad with the "White Space Removal" option disabled, the signature pad sends the entire image of the drawing surface of the pad to the PC. When the "White Space Removal" option is enabled, the pad removes the white space around the signature drawn on the pad and sends only the rectangle that contains the signature information to the PC. Thus, when the PC displays the signature in a signature field in the document, the signature typically appears larger and more legible (compared to no white space removal), especially in the usual case where the signature field in the document is small.

The "Maximum Enlargement Factor" option is used only in cases where the size of signature on the signature pad (after white space removal) is smaller than the size of the signature field in the document. When the signature drawn on the signature pad is smaller than the size of the signature field in the document, IntegriSign Desktop will enlarge the signature to fill the signature field. However, it will limit the enlargement to the value of the maximum enlargement factor. This prevents the signature from looking too pixelated or jagged. For example, the default width and height of the signature field in IntegriSign Desktop are 180 and 110 pixels, if not changed by the user. When translated into inches, the width is 1.875 inches and the height is 1.145 inches. If the signature field in the document is 4.0 inches wide and 2.0 inches high, IntegriSign Desktop will enlarge the signature to fill the signature field, but limit the enlargement to the maximum enlargement factor. If the maximum enlargement factor is 1.50, then the signature in the document will be no more than 50% larger than the signature captured on the signature pad. The maximum enlargement factor can range between 1.0 and 2.0.

IntegriSign Desktop applies the current "White Space Removal" and "Maximum Enlargement Factor" settings set in the Desktop Configuration to all the signatures in a document signed using IntegriSign Desktop (including previously signed signatures) when the document is opened. Thus, suppose you have signed a document with the "White Space Removal" option disabled and saved the document. Later, if you enable the "White Space Removal" option and open the previously signed document, IntegriSign Desktop applies its "White Space Removal" technique to the previously signed signatures. Furthermore, if IntegriSign Desktop has enlarged a signature to fill a signature field, it applies the "Maximum Enlargement Factor" option as appropriate.

The "Auto Select Signer Name from List" option selects a signer profile (if profiles exist) automatically in the signing window when checked. The functionality of this feature is that, if you have any profiles created using the "Preferences Manager", the last created signer profile is automatically selected if this option is set in the "Desktop Configuration" window. The selected signer profile will be of the last used signer, if there are no profiles created between the last usage and current usage. If this option is turned off, the profile will not be selected by default when the signature capture dialog pops-up.

The "Required Information" section allows you to make the "Signer Name" option mandatory for signing.

"ePad LCD" options allow the user to configure the ePad LCD devices (e.g. ePad-ink). The "Background Image" option lets the user select the image that needs to be displayed on the ePad LCD device during signature capture. Selecting "Default" displays the image that is selected in the ePad LCD device "Control Panel" applet (for ePad-ink, it is ePadInk-USB). Selecting "IntegriSign" displays an image with three buttons on the device: "OK", "CLEAR", and "CANCEL". The functionality associated with these buttons is same as the buttons in the "Signature Capture Dialog".

The "Text to display below signature" option lets the user specify the text to be displayed on the ePad LCD Device below the signature capture region and above the "OK", "CLEAR", and "CANCEL" buttons. A maximum of two lines on the device can be used to display this text. If the device is an ePad-ink, the text can contain a new line character "\n" to wrap the text into two lines. If no "\n" is supplied, then the software wraps the text into two lines (if the text cannot be fit into one line). If the device is an ePad-vision, "\n" is not required, the text is sent to the device "as-is", and the device displays the same in a text widget.

The "ePad-vision Options" section allows the user to specify if the compliance text options feature needs to be enabled. This feature is available only for ePad-vision devices. If the option "Enable compliance text options" is selected, the button "Options" gets enabled and you can choose the screens to be displayed during the act-of-signing. Clicking the "Options…" button will display the following window.

By default, only the "Affirmation Text" box is selected, and it cannot be unchecked since it is mandatory. However, the affirmation text can be edited according to your requirements. Also, you can choose to enable or disable the "Compliance Text" and "Agreement Text" screens and can edit the corresponding text. If all of the options are selected, during the act-of-signing, the screens are displayed in the following order:

1. "Agreement Text" screen containing "Decline" and "Accept" buttons
2. "Compliance Text" screen containing "Opt-out" and "Proceed" buttons
3. "Affirmation Text" screen where the affirmation text is displayed along with "OK", "CLEAR", and "CANCEL" buttons (including an area of signing)

If the option "Enable compliance text options" is selected in the "Desktop Configuration" window, the above screens are displayed for every signature capture in all the IntegriSign Desktop plug-ins.

2.2 – Creating User Profiles

User profiles can be created using "Create" option available in the "IntegriSign Desktop Preferences" window. Enter details like signer name, organization unit, organization name, email, etc. Only the "Signer" name field is mandatory.

2.2.1 – Public Signing

In public signing (e.g. customer signing), the signer can enter a name in the "Signer Name" field and start signing using an ePad device. The "Auto Select Signer Name from List" option in the "Desktop Configuration" window has to be unchecked for public signing in case a profile already exists.

3.0 – Steps for Configuring the Certificate Selection and User Profile Creation

1. A digital certificate is required for signing in Acrobat 10.0 and later. The certificate can be self-signed or from a trusted CA (Certificate Authority). If you don't already have a certificate for signing, follow these steps to import a certificate:
    i. Navigate to the IntegriSign Desktop installation folder (typically "C:\Program Files (x86)\IntegriSign Desktop\Desktop" for a 64-bit OS or "C:\Program Files\IntegriSign Desktop\Desktop" for a 32-bit OS) and select the certificate (for example, the certificate named pdocsignerTopaz.pfx is installed as part of the installation) and double-click on it.
    ii. Select the "Current User" option under "Store Location", and click on the "Next" button in the displayed "Certificate Import Wizard" window.
    iii. Click on the "Next" button in the displayed "Certificate Import Wizard" window.
    iv. Enter the password (for example, the password for the certificate pdocsignerTopaz.pfx is "43p4gL7Rn9N7"), and click the "Next" button in the displayed "Certificate Import Wizard" window.
    v. Make sure that the "Automatically select the certificate store based on the type of certificate" option is selected and click the "Next" button in the displayed "Certificate Import Wizard" window.
    vi. Click the "Finish" button in the displayed "Certificate Import Wizard" window.
    vii. Click the "OK" button in the displayed message.
2. Invoke the "IntegriSign Desktop Configuration" window from the following location: "Start - Programs - IntegriSign Desktop - Desktop - Desktop Configuration".
3. In the "Certificate Selection" sub-window, click the "Select" button.
4. In the "IntegriSign – Certificate Manager" window, select the certificate to be used when signing (for example, the certificate value "pDocSigner" corresponds to the pdocsignerTopaz.pfx certificate installed previously), then click the "OK" button.
5. Invoke the "IntegriSign Desktop – Preferences" window from the following location: "Start - Programs - IntegriSign Desktop - Desktop - Preferences Manager".
6. Create the "User Profile" in the "Preferences Manager" window.

Note: Expired certificates are not shown in the "IntegriSign – Certificate Manager" window.

4.0 – Steps for Signing in Adobe Acrobat

4.1 – Creating a Signature in Adobe Acrobat Professional 10.0

Signing in Adobe Acrobat Professional 10.0 can be accomplished in the following ways:

4.1.1 – Signing a New Signature Field

1. Open the PDF document to be signed.
2. Click on the "Tools" button, and then click on the "Sign & Certify" pane item in the "Tools" task pane.
3. Click "Place Signature" or "Sign Document" and then using the mouse, click and drag to draw the area where you would like the signature to appear in your document.
4. Start signing in the displayed signature window.

4.1.2 – Placing an Empty Signature Field

1. Open the PDF document to be signed.
2. Click on the "Edit" button under the "Forms" menu in the "Tools" task pane.
    i.   If the opened PDF does not contain any prior form fields, you will receive a message saying "Currently there are no form fields in this PDF. Do you want Acrobat to detect form fields for you?". Click on the "Yes" button. You will receive a message that "No new form field annotations were detected". Click on the "OK" button and "Design Mode" will be enabled.
    ii. If the PDF contains form fields, you will not receive any messages and will be taken directly to "Design Mode".
3. In "Design Mode", either click on the "Forms - Tasks - Add New Field" and then select "Digital Signature", or click on the "Add a digital signature" button in the toolbar.

4.2 – Signing in Adobe Acrobat Reader 10.0

Signing in Adobe Acrobat Reader 10.0 can be accomplished in the following ways.

Note: The PDF document must be rights-enabled before signing the signature in the Adobe Acrobat Reader 10 application.

4.2.1 – Signing a New Signature Field

1. Open the PDF document to be signed.
2. Click on the "Tools" tab, and then click on "Place Signature" or "Sign Document" in the "Tools" task pane.
3. Click and drag to draw the area where you would like the signature to appear in your document.
4. Start signing in the displayed signature window.

4.2.2 – Signing an Existing Signature Field

1. Open the PDF document which already has blank signature fields in the document.
2. Click on the signature field in the document.
3. Start signing in the displayed signature window.

4.2.3 – Signing in Enable Protected Mode

In Adobe Acrobat Reader 10.0, by default, the "Enable Protected Mode at Startup" option under "Edit - Preferences - General - Application Startup" should be in enabled mode.

When you try to sign a signature when this setting is on, after clicking on the "OK" button in the Signature Capture window or on the signature capture device, you will be prompted with the "Save As" screen. Once the document is saved, the signature is applied to the document. If "Enable Protected Mode at Startup" is disabled (i.e., unchecked), the signature gets applied to the PDF document without the "Save As" prompt and the document gets saved.

4.3 – Creating a Signature in Adobe Acrobat Professional 11.0

Signing in Adobe Acrobat Professional 11.0 can be accomplished in the following ways.

4.3.1 – Signing a New Signature Field

1. Open the PDF document to be signed.
2. Click on the "Tools" button, and then click on the "Sign & Certify" pane item in the "Tools" task pane.
3. Click "Place Signature" or "Sign Document" and then using the mouse, click and drag to draw the area where you would like the signature to appear in your document.
4. Start signing in the displayed signature window.

4.3.2 – Placing an Empty Signature Field

1. Open the PDF document to be signed.
2. Click on "Edit" button under the "Forms" menu in the "Tools" task pane.
    i. If the opened PDF does not contain any prior form fields, you will receive a message saying "Currently there are no form fields in this PDF. Do you want Acrobat to detect form fields for you?". Click on the "Yes" button. You will receive a message that says "No new form field annotations were detected". Click on the "OK" button, and "Design Mode" will be enabled.
    ii. If the PDF contains form fields, you will not receive any messages and will be taken directly to "Design Mode".
3. In "Design Mode", either click on "Forms - Tasks - Add New Field" and then select "Digital Signature", or click on "Add a digital signature" button in the toolbar.
4. Using the mouse, click and drag to draw the area where you would like the signature to appear on your document. Right click on the newly inserted signature field and then select "Properties".
5. The "Digital Signature Properties" window is now displayed. Enter an appropriate name in the "General" tab. In the "Appearance" tab, you can set the details like font, text color, borders, and more.

4.4 – Signing in Adobe Acrobat Reader 11.0

Signing in Adobe Acrobat Reader 11.0 can be accomplished in the following ways.

Note: The PDF document must be rights-enabled before signing the signature in the Adobe Reader 11 application.

4.4.1 – Signing a New Signature Field

1. Open the PDF document to be signed.
2. Click on the "Sign" tab, and then click on "Place Signature" in the "Sign" task pane.
3. Click on the "Next" button in the displayed confirmation message.
4. Click and drag to draw the area where you would like the signature to appear on your document.
5. Start signing in the displayed signature window.

4.4.2 – Signing an Existing Signature Field

1. Open the PDF document which already has blank signature fields in the document.
2. Click on the signature field in the document.
3. Start signing in the displayed signature window.

4.4.3 – Signing in Enable Protected Mode

In Adobe Acrobat Reader 11.0, by default, the "Enable Protected Mode at Startup" option under "Edit - Preferences - Security (Enhanced) - Sandbox Protections" should be in enabled mode.

When you try to sign a signature when this setting is on, after clicking on the "OK" button in the Signature Capture window or on the signature capture device, you will be prompted with the "Save As" screen. Once the document is saved, the signature is applied to the document. If "Enable Protected Mode at Startup" is disabled (i.e., unchecked), the signature gets applied to the PDF document without the "Save As" prompt and the document gets saved.

4.5 – Creating a Signature in Adobe Acrobat Pro DC

Signing in Adobe Acrobat Pro DC can be accomplished in the following ways.

4.5.1 – Signing a New Signature Field

1. Open the PDF document to be signed.
2. Click on the "Tools" tab, click on "Certificates" and then click on "Digitally Sign" (in the top toolbar).
3. Click and drag to draw the area where you would like the signature to appear in your document.
4. Start signing in the displayed signature window.

4.5.2 – Placing an Empty Signature Field

1. Click "Tools" and then "Prepare Form". Select the document you wish to sign, and then click the "Start" button.
2. Near the top of the window, click the "Add a digital signature" button.
3. Place the signature field where you would like the signature to appear in your document and drag the signature field to the desired size using the mouse. After doing so, name the signature field, check if it needs to be a "required field", and exit out of the signature box by clicking anywhere on the PDF.
4. Click the "X" in the "Prepare Form" menu to exit out of the "Prepare Form" mode.

4.6 – Signing in Adobe Acrobat Reader DC

Signing in Adobe Acrobat Reader DC can be accomplished in the following ways.

4.6.1 – Signing a New Signature Field

1. Open the PDF document to be signed.
2. Click on the "Tools" tab, click on "Certificates" and then click on the "Digitally Sign" (in the top toolbar).
3. Click and drag to draw the area where you would like the signature to appear in your document.
4. Start signing in the displayed signature window.

4.6.2 – Signing an Existing Signature Field

1. Open the PDF document which already has blank signature fields in the document.
2. Click on the signature field in the document.
3. Start signing in the displayed signature window.

4.6.3 – Signing in Enable Protected Mode

In Adobe Acrobat Reader DC, by default, the "Enable Protected Mode at Startup" option under "Edit - Preferences - Security (Enhanced) - Sandbox Protections" should be in enabled mode.

When you try to sign a signature when this setting is on, after clicking on the "OK" button in the Signature Capture window or on the signature capture device, you will be prompted with the "Save As" screen. Once the document is saved, the signature is applied to the document. If "Enable Protected Mode at Startup" is disabled (i.e., unchecked), the signature gets applied to the PDF document without the "Save As" prompt and the document gets saved.

5.0 – Document Verification in Adobe Acrobat

Right-click on the signed signature in the document. Acrobat 10.0, Acrobat 11.0 and Acrobat DC will display a window with the following options:

Clear Signature Field: Clears the signature field.

Validate Signature: IntegriSign for Acrobat checks to see if the document and the signature have been altered after signing.

View Signed Version: IntegriSign for Acrobat displays a window that shows the version of the file that existed at the time of signing.

Compare Signed Version to Current Document: If a document is signed more than once, IntegriSign for Acrobat maintains all of the signed versions in a single Adobe PDF file. The earlier versions can be compared with the current document with this option.

Properties: Clicking on this option shows a window with the image of the signature, ePad device information, and the signer information.

6.0 – Steps for Signing in Microsoft Excel

When IntegriSign Desktop is installed onto a system, the plug-in for MS Excel 2010/2013/2016/2019/2021 is automatically installed. On opening the application, you will be able to find the IntegriSign options under the "IntegriSign" menu, as shown below:
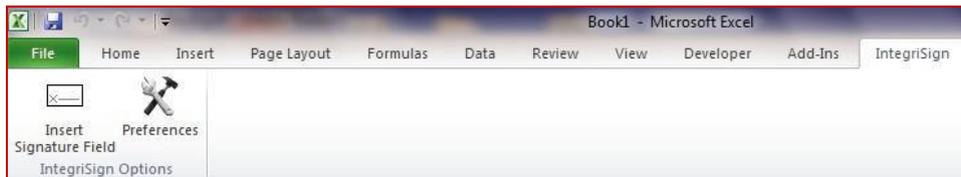
6.1 – Macro Security Settings

1. Click on the "Developer" tab.

   Note: If the "Developer" tab isn't visible, see the next page for instructions.

2. Click on the "Macro Security" button (i.e. "Yellow Exclamation" button) under the "Code" group. For reference, see the image below.

3. IntegriSign macros are digitally signed. Change the setting to "Disable all macros except digitally signed macros", as shown below.

4. Once the above setting is applied, restart MS Excel.
5. You might be prompted with a message bar saying "Security Warning ActiveX controls have been disabled" with an "Enable Content" button. Simply click on the button to proceed further.

Note: If the "Developer" tab is not visible, follow the steps below to enable the tab:

1. Open the "Excel Options" window using "File - Options".
2. Select the "Customize Ribbon" option on the left side of the "Excel Options" window.
3. Check the "Developer" option in the list under the "Customize the Ribbon" section.Click on the "OK" button to finalize.

See the below screenshot for reference.
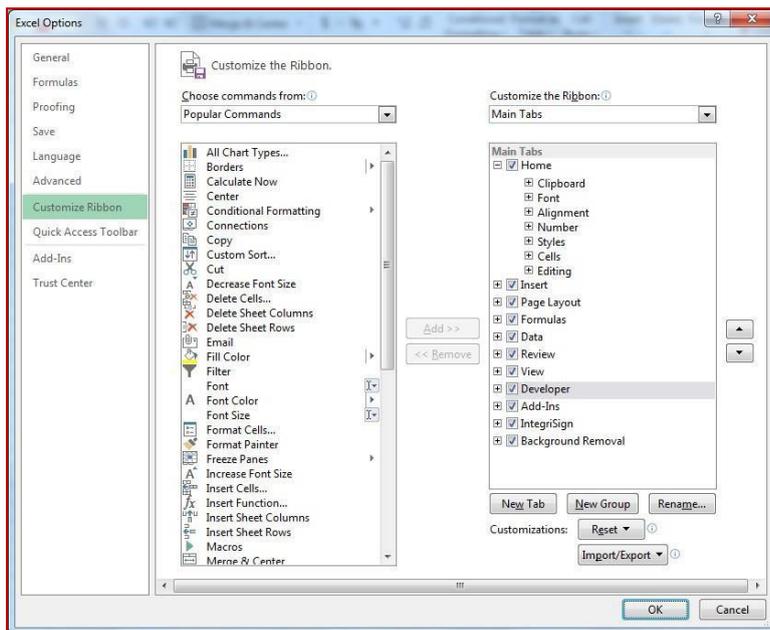
6.2 – Creating a Signature

Signing in MS Excel using IntegriSign can be accomplished by using the "Sign Document" option.

1. Make the entries in the Excel Sheet and compose the workbook.
2. Create sheets, depending on requirement (for more information, see the *Sheet-wise Signing* section below).
3. Place the cursor on the Sheet that requires a signature and click on the "Sign Document" button.
4. An "Authenticate" window is displayed which presents the signer with the option of authenticating a specific sheet or the entire workbook.
5. Choose single or multiple sheets for workbook authentication.
6. Click "OK" to place a signature placeholder with the words "Double-click to Sign". Double-click this placeholder to sign the sheet.
7. The signature capture screen is now displayed to capture inputs from the ePad.
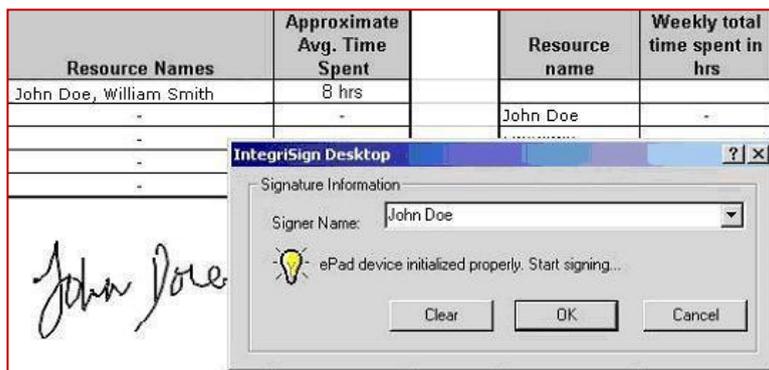
8. Select the "Signer" name from the list for a registered signer, or for public (non-registered) signing, the signer can just enter their name in the "Signer Name" field.

9. Sign using the ePad. The signature trace is shown in the signature placeholder. To apply the signature to the document, click on the "OK" button. To clear the signature, click on the "Clear" Button. To cancel signing, click on the "Cancel" button in the dialog displayed.

In addition to the basic functions mentioned in the Introduction, the IntegriSign MS Excel Plug-In also offers sheet-wise signing and workbook verification.

6.3 – Sheet-wise Signing

The IntegriSign MS Excel Plug-in allows you to create multiple sheets in a workbook such that each sheet is treated as an independent workbook. This is especially useful in cases where the same Excel sheet/workbook is being signed by multiple signers and should permit a second or third signer to add comments without affecting the first signer's signature. For example, the first signer (e.g. John) can create a sheet and authenticate it with his signature and forward it to the second signer (e.g. Nancy), who can then add her comments to the second sheet and authenticate it with her signature and so on.

6.4 – Workbook Verification

1. Double-click on the signature in the sheet.
2. A window is displayed with the image of the current signature, "Signature Capture Device" information, and the signer information.
3. If the sheet is modified after signing, then the signature on the sheet is invalidated with an "X" on the signature. Restoring the changes made to the sheet brings back the signature to its original state.

6.5 – Microsoft Excel Troubleshooting

Before you begin signing in Excel, you must ensure that you exit design mode by clicking on the "Design Mode" icon in the "Developer" tab.
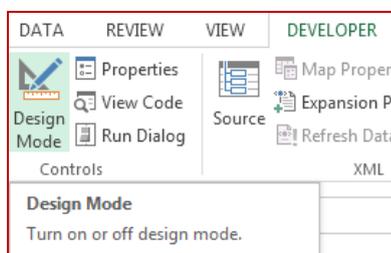
Note: Without exiting design mode, you will be unable to use IntegriSign Desktop.

7.0 – Steps for Signing in Microsoft Word

When IntegriSign Desktop is installed onto a system, the plug-in for MS Word 2010/2013/2016/2019/2021 is automatically installed. On opening the application, you will be able to find the IntegriSign options under the "IntegriSign" menu, as shown below:

7.1 – Macro Security Settings

1. Click on the "Developer" tab.

   Note: If the "Developer" tab isn't visible, see the next page for instructions.

2. Click on the "Macro Security" button (i.e. "Yellow Exclamation" button) under the "Code" group. For reference, see the image below.

3. IntegriSign macros are digitally signed. Change the setting to "Disable all macros except digitally signed macros", as shown below.

4. Once the above setting is applied, restart MS Word.

**Note:** If the "Developer" tab is not visible, follow the steps below to enable the tab:

4. Open the "Word Options" window using "File - Options".
5. Select the "Customize Ribbon" option on the left side of the "Word Options" window.
6. Check the "Developer" option in the list under the "Customize the Ribbon" section.
7. Click on the "OK" button to finalize.

See the below screenshot for reference.
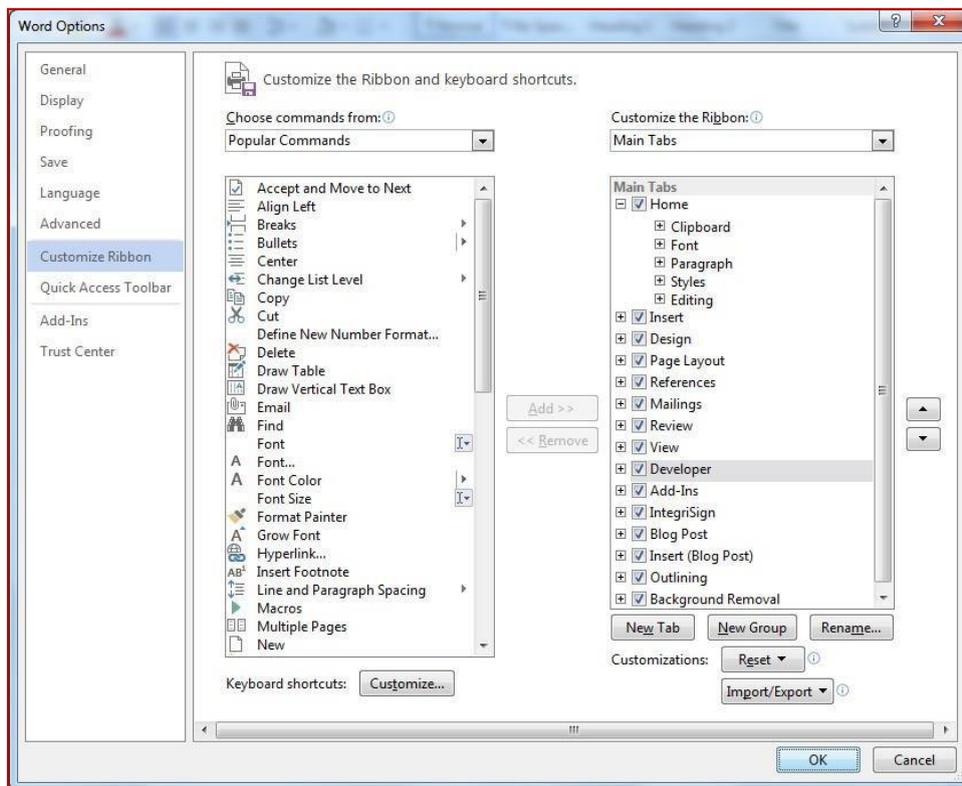
7.2 – Authenticate and Secure Signatures

The "Authenticate and Secure" window gives you the option of authenticating a specific section within the current document or the entire document for the current signature. The "Whole Document" option, when checked, includes the entire document for authentication.
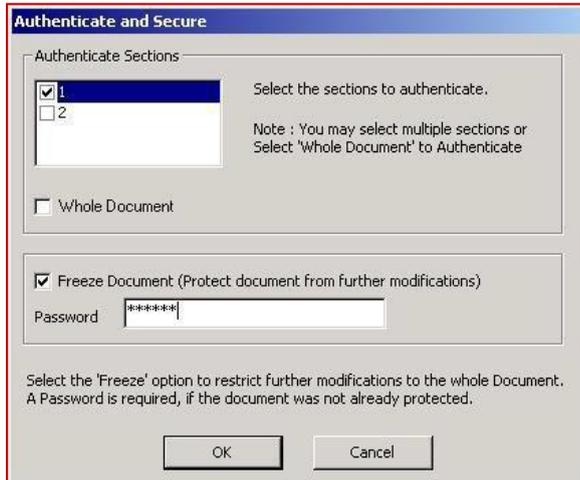
The "Authenticate and Secure" window is not shown during signing process by default. To enable this window, uncheck the "Do not show Authenticate and Secure window" under "Word – Configuration". This can be accessed from the "IntegriSign Configuration" menu. The "Freeze Document" option in IntegriSign for MS Word – Configuration is irreversible. Once a document is frozen, using this option cannot be unfrozen.
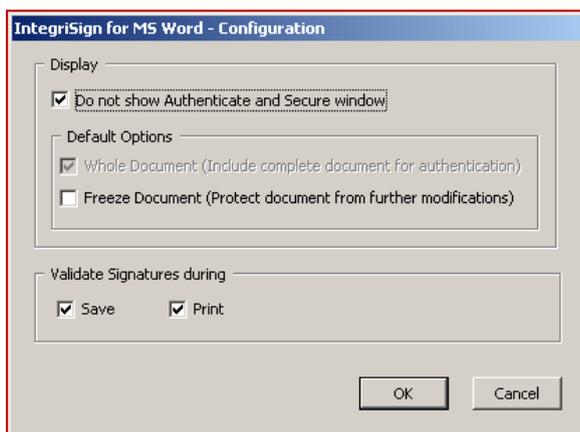
The document can be authenticated automatically in either "Save" or "Print" events. These events can be set from "IntegriSign – Configuration".

7.3 – Freezing a Document

The IntegriSign plug-in allows you to choose if you want to "freeze" the whole document from the "Authenticate and Secure" window. Freezing is accomplished through the act of signing, immobilizes the whole document, and does not allow any changes or modifications to be made. You are required to give a password when using the "Freeze" feature. Frozen documents can be unfrozen from "Developer Restrict Editing - Stop Protection".
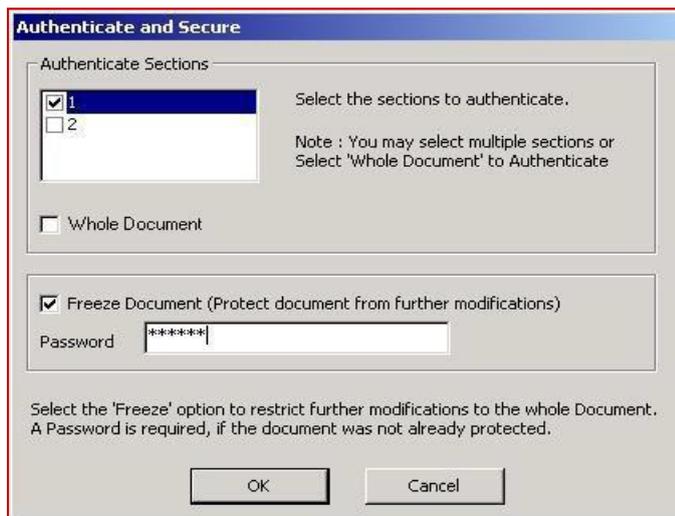
7.4 – Signing Protected Documents and Templates

Before protecting the document to be signed, click "Insert Signature Field" to place a signature placeholder in the Word document. Then, protect the document using the "Protect Document" feature from the "IntegriSign" menu so that you can sign at a later point of time. If the document is protected using the "Restrict Editing" option in the "Developer" menu, signing the document with the content authentication feature is not possible.

Place a signature placeholder in the Word document, and then protect the document. Select "Forms" from the "Protect documents for…" menu. Provide a password to complete the protection of the document process. To unprotect, go to "Developer - Restrict Editing - Stop Protection".

To initiate the act-of-signing on unsigned placeholders/fields in a protected document, use the "Sign Signature Field" option instead of double-clicking the placeholder. The "Sign Signature Field" option displays a window listing all the unsigned signature fields.

In our example below, the document has three unsigned signature fields. When Signature1 is selected, the selected signature is automatically highlighted in the document. Click on the "Sign" button to initiate the act-of-signing.

Note: In a protected document:

1. Blank signature fields in the Header/Footer cannot be signed using the "Sign Signature Field" option.
2. Signatures in the Header/Footer do not get verified when the "Verify All Signatures" option is used.

7.5 – Creating a Signature

Signing in MS Word using IntegriSign can be accomplished by using the "Insert Signature Field" option.

1. Compose the document.
2. Create sections, if desired (for further details on how to create sections in Word, see *Sectional Signing* later in this document).
3. Place the cursor where the signature needs to be placed on the document, and click on the "Insert Signature Field" button. A placeholder appears on the document with the words "Double-click to Sign". Double-click this placeholder to sign the document.
4. The "Authenticate and Secure" window displays, which presents the signer with the option of authenticating a specific section within the current document or the entire document.
5. Choose the sections to be authenticated. You may select one or more sections depending on how many sections you wish to authenticate with that signature.
6. You also have the option of freezing the entire document preventing any further modifications. Freezing an entire document will disable all editing features for the document and cannot be reversed.
7. The signature capture screen is now displayed to capture inputs from the ePad device.

8. Select the "Signer" name from the list for a registered signer, or for public (non-registered) signing, the signer can just enter their name in the "Signer Name" field.
9. Sign using the ePad. The signature trace is shown in the signature placeholder. To apply the signature to the document, click on the "OK" button. To clear the signature, click on the "Clear" Button. To cancel signing, click on the "Cancel" button in the dialog displayed.

In addition to the basic functions mentioned in the Introduction, the IntegriSign MS Word Plug-In also offers sectional signing and document verification.

7.6 – Sectional Signing

The IntegriSign MS Word plug-in allows you to create multiple sections in a document such that each section is treated as an independent document. This is especially useful in cases where the same document is being signed by multiple signers, and should permit a second or third signer to add remarks to any of the sections without affecting the first signer's signature. For example, the first signer (e.g. John) can create a section and authenticate it with his signature and forward it to the second signer (e.g. Nancy), who can then add her comments to the second section and authenticate it with her signature, and so on.

To create sections in MS Word, follow the steps below:

1. Go to "View" on the MS Word toolbar and click on "Draft".
2. Place the cursor at the location where the section break is required.
3. Go to the "Page Layout" toolbar and select "Breaks".
4. Select the type of section break to be inserted, e.g "Continuous" (if the section breaks are intended to be on the same page).
5. A section break is shown on the document where the cursor was located.

The document can be partitioned into any number of sections. Each section in a document is treated independently and can be signed and authenticated, depending on the functionality intended for the document.

7.7 – Document Verification

1. Double-click on the signature in the document. A window is displayed with the image of the current signature, as well as device and signer information.
2. If the document is modified after signing, then the signature on the document is invalidated with a large "X" through the signature. Reversing the change made to the document brings the signature back to its original state.

In case of protected documents, for document verification use the "Verify All Signatures" option. Any modifications made to the document after signing will invalidate the signatures made.

7.8 – Microsoft Word Troubleshooting

7.8.1 – Text with Special Effects

For optimum performance, we advise that you do not place a signature object next to text with special effects, such as strikethrough, superscript, subscript, shadow, and more.

7.8.2 – Auto-Text Fields

Using IntegriSign along with some of the auto-text fields in a Word document's "Header and Footer" are not supported. Using such fields will update the document content over time, thus modifying the signature and making it invalid. Use of the following auto-text fields with IntegriSign is not recommended:

1. Author
2. Page #
3. Date
4. Confidential
5. Last printed
6. Page X of Y

Note: In some cases, inserting the signature placeholder can alter the Table of Contents (e.g. page numbers might change). Signing without regenerating the Table of Contents and saving the document will invalidate the signature. It is advisable to regenerate the Table of Contents after placing all the signature placeholders. Then, save the document before signing.