


silanisTM e-Sign Desktop *Quick-Start Tutorial*

E-SIGN IN 3 EASY STEPS

- 1) Place the cursor where you want the e-signature to appear. and click on the  icon or go to **ApproveIt** → **Approve**.
- 2) Select **Johndemo401** as the sample electronic signature.
- 3) Enter the password "john" and Click **OK**.. It's that simple.

With faster processing times, increased customer satisfaction and cost savings being major drivers, businesses and governments alike are looking for ways to automate and streamline both internal and external processes. The task of creating secure, reliable and auditable, electronic approval processes is now viewed as a strategic business decision that provides significant advantages.

In evaluating Silanis' e-Sign® Desktop software, you will see that its support for multiple signatures emulates a paper-based signing process electronically without forcing you to learn an entirely new application. While the demo is limited to MS-Office, the full shipping version allows you to sign electronic documents and forms in a number of other file formats, including Adobe® Acrobat, Adobe Accelio® Capture Formflow Designer (formerly Jetform Formflow 99), Adobe Accelio Capture Classic Formflow Starter Kit (formerly Jetform Formflow 2.x), and PureEdge® InternetForms.

The only difference between this tutorial and the actual shipping version of e-Sign Desktop is that you cannot create your own unique electronic signature (ePersona) file. Instead, the demo provides sample ePersona files so you can immediately test the software's capabilities and experience first-hand, how easy it is to apply a secure and legally enforceable electronic signature.


e-Sign Desktop: Quick-Start Tutorial – Part I

Please note: We recommend that you print out a copy of this document before starting the tutorial. This tutorial will guide you through a typical approval process, showing you how to add multiple signatures to a document, what happens when unauthorized changes are made, and how to securely print signed documents.

Step 1: Preparing to sign

- 5 Close this document and go to the Microsoft Word document located in: Start → Programs → ApproveIt Desktop → ApproveIt for Office → ApproveIt Tutorial Form.
- 5 A typical hospital form will appear on your screen.
- 5 Notice that an e-Sign Desktop drop-down menu has been added to your top menu options. To add the e-Sign Desktop toolbar icons Click on **View** → **Toolbars** → **ApproveIt** and drag the ApproveIt icons onto your toolbar.

Step 2: Signing the form

- 5 Fill in the spaces provided on the top part of the form marked “Medical Information”. For the purpose of this test, simply enter any name and address in the appropriate fields. Do not enter anything under “Medical Insurance Provider”. Use the Tab key to skip from field to field.
- 5 Click on the  icon or go to **ApproveIt** → **Approve**
- 5 You will be prompted to select a sample ePersona electronic signature file to sign the form with. Select **Johndemo401** from the list and click **Open**.
- 5 Enter the password “john” to unlock the e-signature. Make sure you type the password in lower-case, as it is case sensitive. Click **OK**.
- 5 A pop-up screen displays the image of the signature as it will appear on the form, with the field it will replace in the bottom right hand corner. This should read: Place Signature at {SIGNATURE1}.
- 5 Click **OK** to sign the document. The signature will appear in the signature box beside **Signature of Patient**. (See Figure 1)

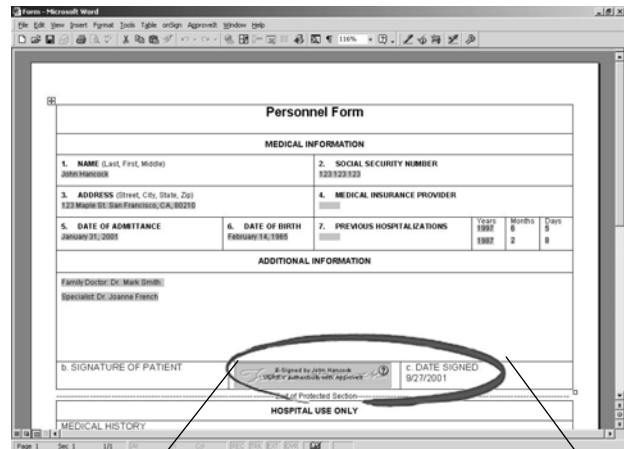
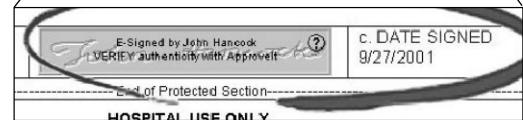


Figure 1




WHAT TO LOOK FOR

- 5 **Dynamic data placement**
Notice that the signature and the date on which the document was signed have been automatically inserted in the appropriate fields in the top half of the form. This feature is essential for many business processes, especially those that are industry regulated, and that require information such as the name, date and title to be entered alongside the signature. This enables organizations to continue using their existing forms to meet industry regulations.
- 5 **Signature state**
Notice that immediately after signing the form, the signature box has a green checkmark in the top right hand corner confirming its validity, but that once you click on the form, the signature changes and you see a grey box with a yellow question mark in the top right corner with the words “E-signed by John Hancock.” This ensures that the signature cannot be cut and pasted into another document without the signer’s knowledge, and also prompts you to authenticate the document.

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Step 3: Authenticating the form

- 5 Click on the  icon or go to **ApproveIt** → **Verify Approval**.
- 5 ApproveIt opens the Audit Trail window, which contains the document's signing history. (See Figure 2)

WHAT TO LOOK FOR

- 5 **Document authenticity**
Notice that the top of the window reads: "Document has not been modified". This tells you that the document is valid and authentic.
- 5 **Signing information**
Notice that the name John Hancock is listed with the date and time the signature was added. The green checkmark confirms the signature's validity.
- 5 **Certificate information**
Notice that the digital certificate information is easily accessible and verified by clicking on **Certificate: Show Details**. Click **OK** to return to the Audit Trail window.

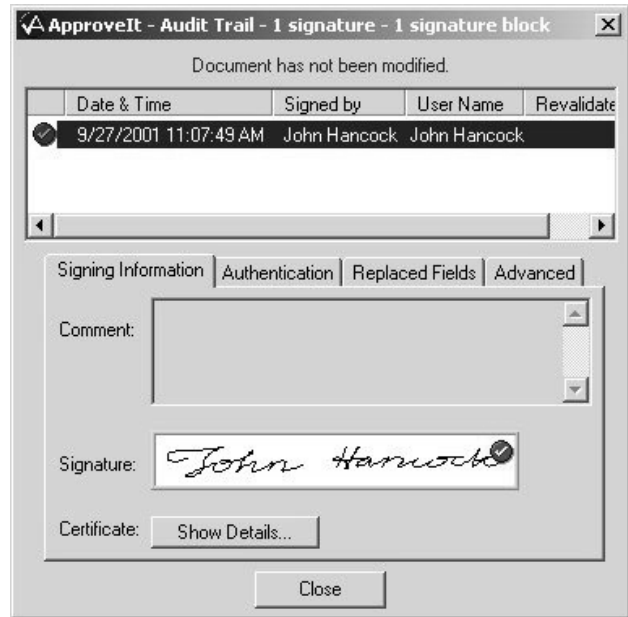



Figure 2

Step 4: Detecting changes

- 5 Return to the top part of the form and enter "Acme" in the Medical Insurance Provider section.
- 5 Click on the  icon or go to **ApproveIt** → **Verify Approval** to bring up the Audit Trail window

WHAT TO LOOK FOR

- 5 **Document authentication**
Notice that the top of the window now reads: "Document has been modified".
- 5 **Signature states**
Notice that the signature is now set off with an X, and that it has a red line through it. This indicates that the document is no longer authentic and should not be trusted as being valid. (See Figure 3)

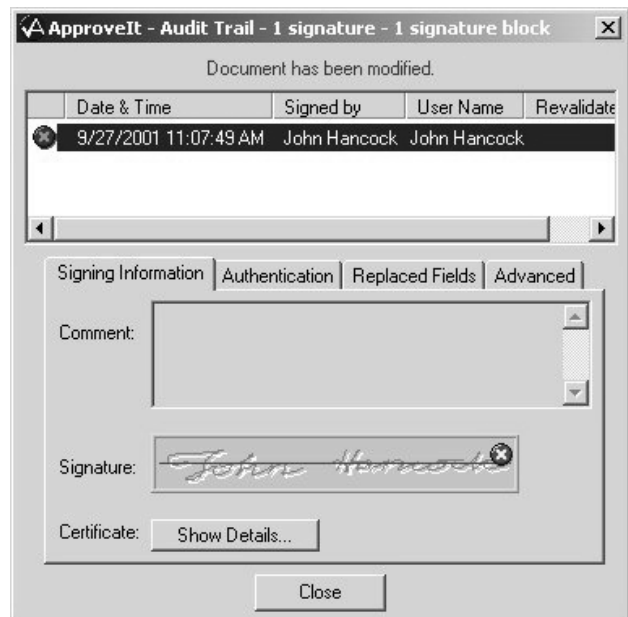




Figure 3

- 5 Return to the top part of the form and delete the word "Acme" that you had typed into the Medical Insurance Provider section.
- 5 Click on the  icon or go to **ApproveIt** → **Verify Approval** and notice that the document is once again valid and authentic.

e-Sign Desktop: Quick-Start Tutorial – Part I

Step 5: Adding a second signature

- 5 Go to the second part of the form marked “Hospital Use Only”. In the Medical History section, type the words “Patient is allergic to penicillin.”
- 5 Click on the  icon or go to **ApproveIt** → **Approve**.
- 5 ApproveIt notifies you that the document has already been approved and asks if you want to add another signature. Click **Yes** to add a second signature.
- 5 You will be prompted to select a sample ePersona electronic signature file to sign the form with. Select **Dawndemo401** from the list and click **Open**.
- 5 Enter the password “dawn” to unlock the e-signature. Make sure you type the password in lower-case, as it is case sensitive. Click **OK**.
- 5 A pop-up screen displays the image of the signature as it will appear on the form, with the field it will replace in the bottom right hand corner. This should read: Place Signature at {SIGNATURE2}.
- 5 Click **OK** to sign the document. The signature will appear in the signature box beside **Signature**. (See Figure 4)

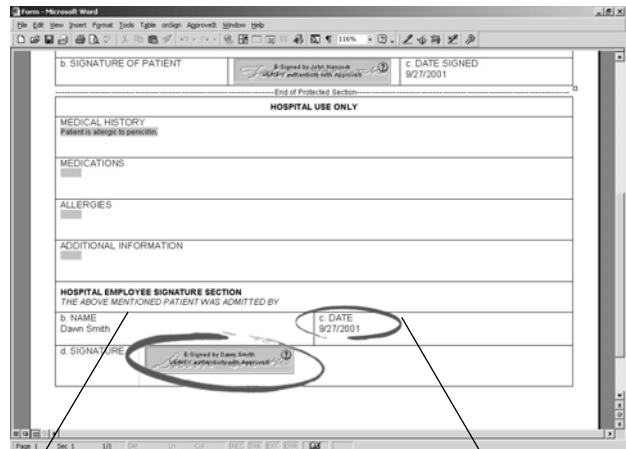



Figure 4

WHAT TO LOOK FOR

- 5 **Dynamic data placement**
Notice that the second signature and the date on which the document was signed have been automatically inserted in the appropriate fields in the bottom half of the form.
- 5 **Signature state**
Notice that immediately after signing the form, the signature box has a green checkmark in the top right hand corner confirming its validity.
- 5 **Sectional signing**
Notice how e-Sign Desktop enables multiple people to sign different sections of the same document without invalidating the previous signature. This is a limitation for other solutions that cannot detect the difference between an unauthorized change and the addition of a valid signature.

Step 6: Printing the document

- 5 Click on the  icon or go to **ApproveIt** → **Secure Print**.
- 5 Note that you must use the ApproveIt secure print command to generate the authenticated form. If you use the Word print command under the file menu, the page will display the grey signature boxes in their ‘Verify Approval’ states.
- 5 e-Sign Desktop performs the authentication process and displays the Word print menu.
- 5 Click **OK** to print

WHAT TO LOOK FOR


- 5 **Signature states**
Notice that when you print out the form, both signatures appear exactly as they would if the signers had used a pen and paper. This enables organizations to revert to paper at any time during the process so that a paper copy of the document can be made available to people without a computer, or so that hard copy archiving requirements can be met.

e-Sign Desktop: Quick-Start Tutorial – Part II


This part of the tutorial will guide you through the process of making a change to a document that has already been signed, and how you can take responsibility for that change by revalidating the document with a second signature.

Please note: Again, we recommend that you print out a copy of this document before starting.

Step 1: Signing the form

- 5 Reopen the file named “Form.doc” located in:
Start → Programs → ApproveIt Desktop → ApproveIt for Office → ApproveIt Tutorial Form.
- 5 Fill in the spaces provided on the top part of the form marked “Medical Information”. For the purpose of this test, simply enter any name and address in the appropriate fields. Do not enter anything under “Medical Insurance Provider”. Use the Tab key to skip from field to field.
- 5 Click on the  icon or go to **ApproveIt → Approve**.
- 5 You will be prompted to select a sample ePersona electronic signature file to sign the form with. Select **Johndemo401** from the list and click **Open**.
- 5 Enter the password “john” to unlock the e-signature. Make sure you type the password in lower-case, as it is case sensitive. Click **OK**.
- 5 A pop-up screen displays the image of the signature as it will appear on the form, with the field it will replace in the bottom right hand corner. This should read:
Place Signature at {SIGNATURE1}.
- 5 Click **OK** to sign the document. The signature will appear in the signature box beside **Signature of Patient**.

Step 2: Making a change and re-validating the document

- 5 Return to the top part of the form and enter “Acme Medical” in the Medical Insurance Provider section.
- 5 Go to the second part of the form marked “Hospital Use Only”. In the Medical History section, type the words “Patient is allergic to penicillin.”
- 5 Click on the  icon or go to **ApproveIt → Approve**.
- 5 ApproveIt notifies you that the document has been modified and asks if you want to continue with the approval. Click **Yes** to add a second signature.
- 5 Select **Dawndemo401** from the list and click **Open**.
- 5 Enter the password “dawn” to unlock the e-signature.

Make sure you type the password in lower-case, as it is case sensitive. Click **OK**.

- 5 A pop-up screen displays the image of the signature, as it will appear on the form. Type the words, “Patient forgot to enter Insurance Provider” in the **Comment** box.
- 5 Click **OK** to sign the document. The signature will appear in the signature box beside **Signature**.

WHAT TO LOOK FOR

- 5 **Accepting modifications**
Notice that before adding the second signature, you are informed that the document was modified. By accepting to sign the document, you accepted to take responsibility for the changes that were made after the first signature was applied – in this case, adding the medical insurance provider information that the patient forgot to enter in the top part of the form.

Step 3: Authenticating the form

- 5 Click on the  icon or go to **ApproveIt → Verify Approval**.



Figure 5

WHAT TO LOOK FOR

- 5 **Document authenticity**
Notice that the top of the window reads: Document has been modified and revalidated. This tells you that the document was validated, modified, and then revalidated during the signing process.
- 5 **Signing information**
Notice that the names of the signers are cited in chronological order and reference the date and time the respective signatures were added. Also notice the comment that you had entered at the time of signing, explaining why the change was made.
- 5 **Signature validity**
Notice that beside the first signer's name there is a green checkmark over-arched by a red arrow. This demonstrates that the second signer revalidated the first signature and took responsibility for the changes.
- 5 **Certificate information**
Notice that the digital certificate information for both signatures is easily accessible and verified by clicking on **Certificate: Show Details**. Click **OK** to return to the Audit Trail window.
- 5 **Authentication**
Notice that the first signer only has authentication rights for Section 1, whereas the second signer has authentication responsibility for both sections.
- 5 **Replaced fields**
Notice that the first signature replaced only the DATE1 field, whereas the second signature replaced DATE2 and CAPTURENAME2

Conclusion

If you have purchased e-Sign Desktop and are looking for instructions on how to create your own unique ePersona signature file, please refer to the electronic version of the ApproveIt for Office Manual found in the sub-menu of ApproveIt for Office (Start → Programs → ApproveIt Desktop → ApproveIt for Office → ApproveIt for Office Manual).

If you have not yet purchased e-Sign Desktop and would like more information, we've put together a series of relevant and to-the-point reference materials, all in a one-stop resource center. This E-Signature Evaluation Program will help you evaluate and test electronic signatures, as well as communicate the value and ROI to senior management.