



# Infowise Signature Field User Guide

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## Introduction

Infowise Signature Field is a custom field that enables signing SharePoint items or document content and properties with user name and password to comply with regulatory requirements. The field stores, in an encrypted form, the user identity, time and date of signing, item version (if enabled) and a hash sum of signed fields' values.

The signature field supports different signature providers, such as Active Directory (user name and password combination), Topaz signature pad (hand-written signature) and Windows Integrated Authentication (using the currently logged-in user's credentials). Authenticating using the selected provider during the data entry or editing phase will sign the item, which will cause an icon to appear to indicate that the item has been signed and the signature is intact. If the item's signed field is edited afterwards, without re-signing, the signature is broken and the icon is replaced to indicate this fact.

The field can be set up to sign one or more of the other fields in the list, the signature will only affect the field that the field is attached to, changes to other fields of the item will not break the signature.

## Installation

Note: as the product is installed as a SharePoint Solution, you need to install it only once, regardless of the number of your front-end servers.

Double-click the installation file and follow the on-screen instructions. You do not have to change the default settings.

## Registration

If you have purchased the product, use the *Infowise Capability Dashboard* management page accessible through the *Central Administration* site. Enter the License Key under the corresponding product. If no License Key is entered, the version is time-limited to 30 days. Both full and time-limited versions contain the same functionality.

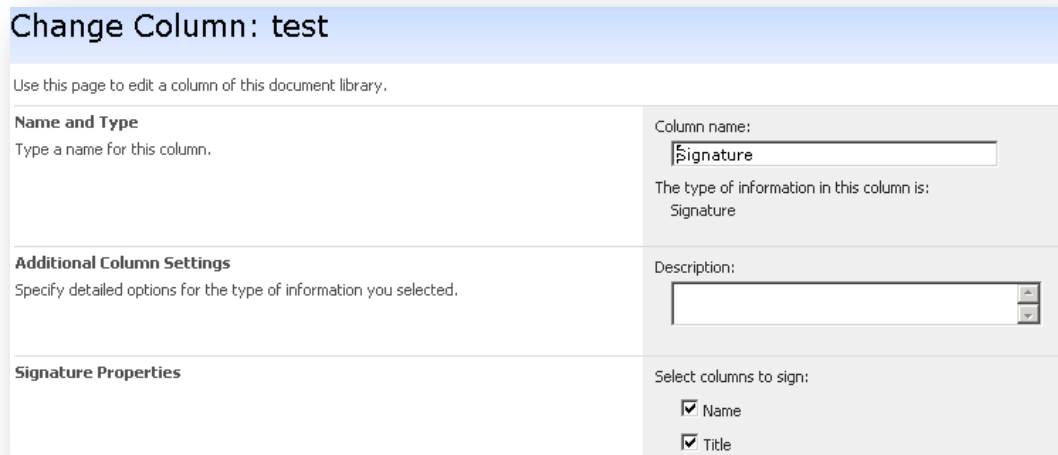
## Usage

The following instruction guides you step-by-step through the process of setting up a sample Infowise Signature Field implementation.

### 1. Adding Signature Field

- The Signature Field is added to a list as a new column.
- Click on Create Column in the Settings Menu
- Enter a field name (e.g. *Signature*)
- Select Signature field from the list of installed field types

- Select the fields to be signed by marking the checkboxes next to field names



**Figure 1 - Adding a signature field**

- Select the signature provider to use
  1. Active Directory – users will be required to enter a valid username/password combination
  2. Topaz Signature Pad – hand-written signature is entered using a Topaz Signature Pad (purchased separately).
  3. Windows Integrated Authentication – currently logged-in user’s identity is used, no username entry is required.

Please note: fields to be signed must be placed above the signature field. Use the field ordering settings page to achieve this.

Please note: adding a Signature field also adds an event receiver to the list that handles and validates all updates. Any change to the item may invalidate the signature, such as changes using web services, datasheet view, Office applications or programmatic access. This is done to ensure data integrity under all circumstances. If all signature fields are removed from the list, the event receiver is removed during the next run automatically.

Please note: it is recommended to enable versioning to maintain a complete audit trail.

Please note: due to the feature of SharePoint called Property Promotion/Demotion certain document properties are imported from documents or exported into documents when documents or their properties are saved. Due to this fact Office documents, such as MS-Word documents are updated every time any change is made to their properties. When adding a signature field that includes the document content, the signature will be broken each time any metadata column is updated, even if it’s not included in the actual signature. In this case you must enter username/password every time you edit the document or its properties if you want the document to remain signed.

## 2. Add a Signature

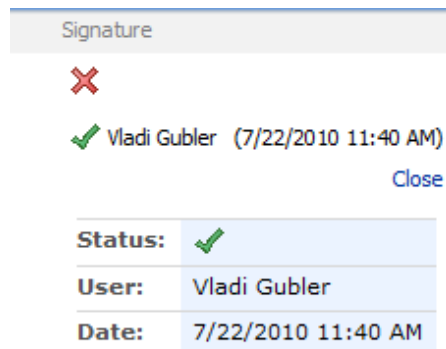
- Enter an item edit/add form
- Edit fields
- Expand the signature box
- Depending on the predefined provider:
  - Enter a valid user name and password pair, or
  - Enter display name, click *Sign* and sign using Topaz Signature Pad, or
  - Check *Add Signature* checkbox to indicate your willingness to add your signature
- Save the item

## 3. Validate Signature

The signature status is shown in views and on item display form as it is stored with the item, it is not recalculated in run-time. In multi-user environments the signature can be broken by another user while you are examining a signed item in a view. To check the validity of the signature in real-time without reloading the whole view you can use the validation feature of the field. Just click on the green signature validity mark to run the validation and present results in run-time.

The following steps are performed:

- A hash value of the signed fields is recalculated, taking into account the signer's name, date and item version
- The hash value is compared to the one stored in the item
- If they match, the signature is still valid, otherwise an invalid signature mark is shown



**Figure 2 - Validate a signature**