Enterprise **Instruction**	StandardTech.Biz

How to Set Up your User Information in Microsoft Word for Electronic Signing

Document Approvals

Role	Position	Name	Approval Signature	Date Approved
Document Author	Procedure Analyst	Bill Young	Signature on File	7/18/2006
Document Owner	Organization Officer	Samuel Spade	Signature on File	7/19/2006

Change History

(Shown in Reverse Chronological Order)

In the text, changes and additions are highlighted by *italics*, deleted text is indicated by an ellipsis (…), and all such modifications are also indicated by a vertical bar in the left margin, as shown for this paragraph.

(The **Table of Contents** begins on page **2**.)

Revision (*)	Date	Author(s) / Document Owner	Description
A	7/20/2006	Bill Young / Samuel Spade	1. Updated for MS Word 2002-2003; 2. Improved step flow by adding more screen captures.
--	2/9/2001	Bill Young / Samuel Spade	ORIGINAL Publication

(*) Does not include individual "drafts" (e.g. "Revision C, Draft #2"), only approved and published final Revisions (e.g. "Revision C").

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Table of Contents

1.0   Purpose

To provide step by step instructions on how to set up the User Information for an individual user workstation copy of Microsoft® (MS) Word, such that this information may be adequately used to insert a "secure" electronic signature (**4.5**) into any document edited by that copy of MS Word.

2.0   Scope

This instruction applies to ALL StandardTech.Biz (STBIZ) staff, specifically when setting up their workstation copy of MS Word for electronically signing documents.

Note: User Information in MS Word, and the procedure for editing it, is not that different between versions on or after Word 2002 and those versions before that; therefore, if you still have a version of MS Word prior to Word 2002, then you should still be able to use this latest instruction.

- Attention: All Quality Teams and Projects, All Qualifications Division (5) Staff
- Inclusion: All Document Control Administrator (DCA) Job Descriptions
- Inclusion: All STBIZ Document Control Administrator (DCA) Training Materials
- Document Series: Quality Standards for Document Control

3.0   Responsibility

- All STBIZ staff to follow this instruction prior to electronically signing documents with MS Word.
- All Document Control Administrators to implement the use of this instruction.
- All Executives, Managers, Supervisors, and Project Leads to support this instruction.
- The Qualifications Vice President and Executive Council to enforce this instruction.

4.0   Definitions

4.1   Document Control Administration

Actions by StandardTech.Biz (STBIZ) to accomplish standard Document Control, as recommended by the International Organization for Standardization (ISO) and industry best practices.

4.2   Document Control Administrator (DCA)

A person assigned, full time or as a "double duty", to handle all **Document Control Administration** for a specific area of StandardTech.Biz (STBIZ), as described in procedure STBIZ-PRO-100 (5.0).

4.3   document "author"

Any person who writes a document, whether stated in the document or not.

4.4 document "owner"

The person responsible for the document, including corrections or updates to the document.

4.5 electronic signature

In general, any special mark or set of data inserted or attached to an electronic document that represents the signature of an individual person.

At StandardTech.Biz (STBIZ), this is represented in Microsoft® (MS) Word documents by the use of the "Insert / Comment" command to insert both an identifying electronic mark and some comment text entered by the person "signing" the document, *as shown below:*

Document·Approvals¶

| Role¤	Position¤	Name¤	Approval·Signature¤	Date·Approved¤	
Document·Author¤	Lead·A/V·Support·Technician¤	Dirk·Aventurastas¤	DA¤	7/7/2006¤	Comment [007DIRKAV1]: Okayed. Dirk·Aventurasta¶
Document·Owner¤	A/V·Support·Manager¤	Srilatsalayla·Indira¤	SI¤	7/11/2006¤	Comment [SRMINDIRA2]: Approved by Srilatsalayla·Indira¶

¶

The actual "signature" for each person is the unique electronic "mark" surrounded by brackets when inserted by MS Word's "Insert / Comment" function. In the above sample document, the marks labeled [*007DIRKAV1*] and [SRMINDIRA2] represent the signatures for the two people listed.

The comment text each person types, such as "Okayed. Dirk Aventurasta", is entered only to further clarify what the signature indicates. The signature itself is really the "mark" in brackets.

The text between the brackets is automatically obtained by MS Word from the *User Information (4.6)* stored in each person's copy of the program on his/her desktop workstation.

4.6   User Information

In Microsoft® (MS) Word, that portion of the information and settings adjustable via the "Options" window under the "Tools" menu, which contains information that identifies the user of the program. An example is shown below.
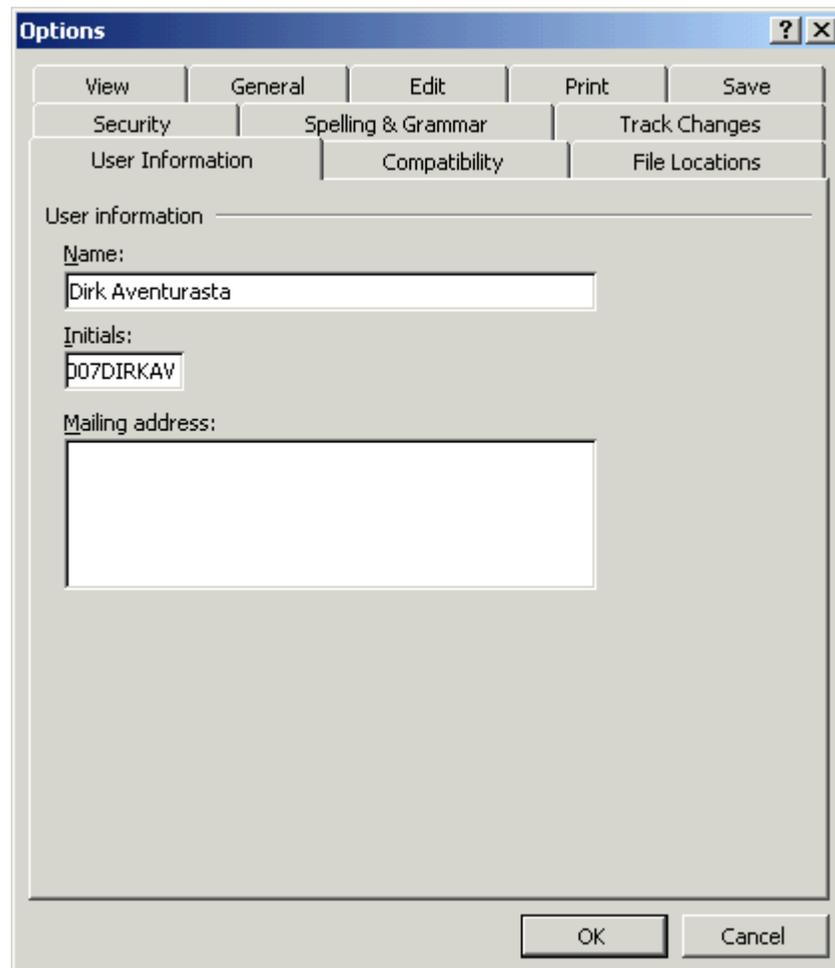
Section 7.0 below shows how to set this User Information, so that the resulting electronic "marks" appear with text similar to what is shown in the example signature shown in 4.5 above.

5.0   Reference Documents

- STBIZ-POL-005 – "Corporate Information Management and Protection"
- STBIZ-PRO-100 – "Document Control Resources and Processes"

6.0   Flow/Swim-Lane Chart

None.

7.0 INSTRUCTION

As described in **4.5**, the text content of your "electronic signature" will be based upon what you have entered as the **User Information** *(4.6)* in the copy of MS Word installed on your desktop workstation.

The following pages give instructions for correctly setting up your User Information in MS Word.

You will need to do perform this task at least once before signing any documents.

Per STBIZ standard document control (4.1), any document signed per this instruction for publication approval, is never published with the signatures present.

Instead, the area's DCA (4.2) files away the actual signed copy in highly a secure area, after making a copy for publication.

In the "publication copy", the DCA replaces each signature with "Signature on File" or some similar phrase per standard procedure, as shown below using the same example given in **4.5**:

Document Approvals

Role	Position	Name	Approval Signature	Date Approved
Document Author	Lead A/V Support Technician	Dirk Aventurastas	Signature on File	7/7/2006
Document Owner	A/V Support Manager	Srilatsalayla Indira	Signature on File	7/11/2006

Change History
(Shown in Reverse Chronological Order)

Revision (*)	Date	Author(s) / Document Owner	Description
--	7/11/2006	Dirk Aventurastas / Srilatsalayla Morgan	ORIGINAL Publication

This ensures that no one but yourself, your area's DCA, and possibly your managers, will ever see your actual electronic signature, thus protecting your signature from potential forgery.

However, unless the portion of your User Information that is placed in electronic signatures is unique and difficult to guess, even if no one sees it on the published document, there might be a chance that your signature could still be forged.

Therefore, please follow these instructions exactly.

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7.1 How to Access your User Information

7.1.1 From the command list at the upper left of the MS Word window, select "Tools", then when a menu choices list pops up, select "Options".
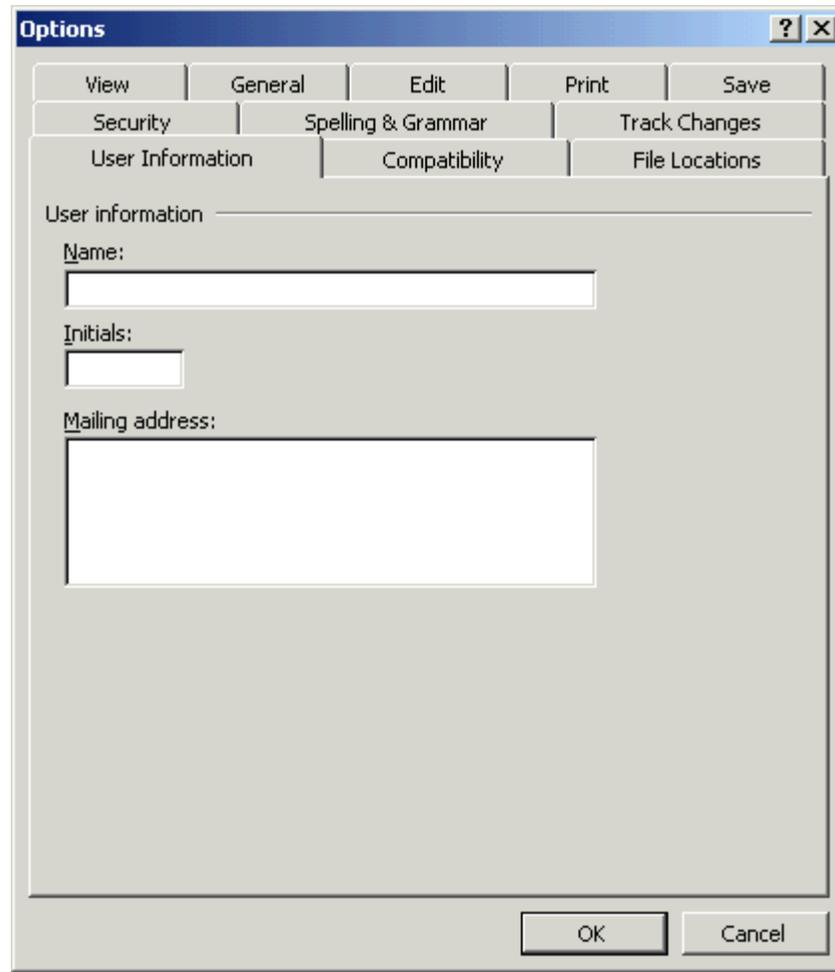
A new pop-up window will appear similar to what is shown below.
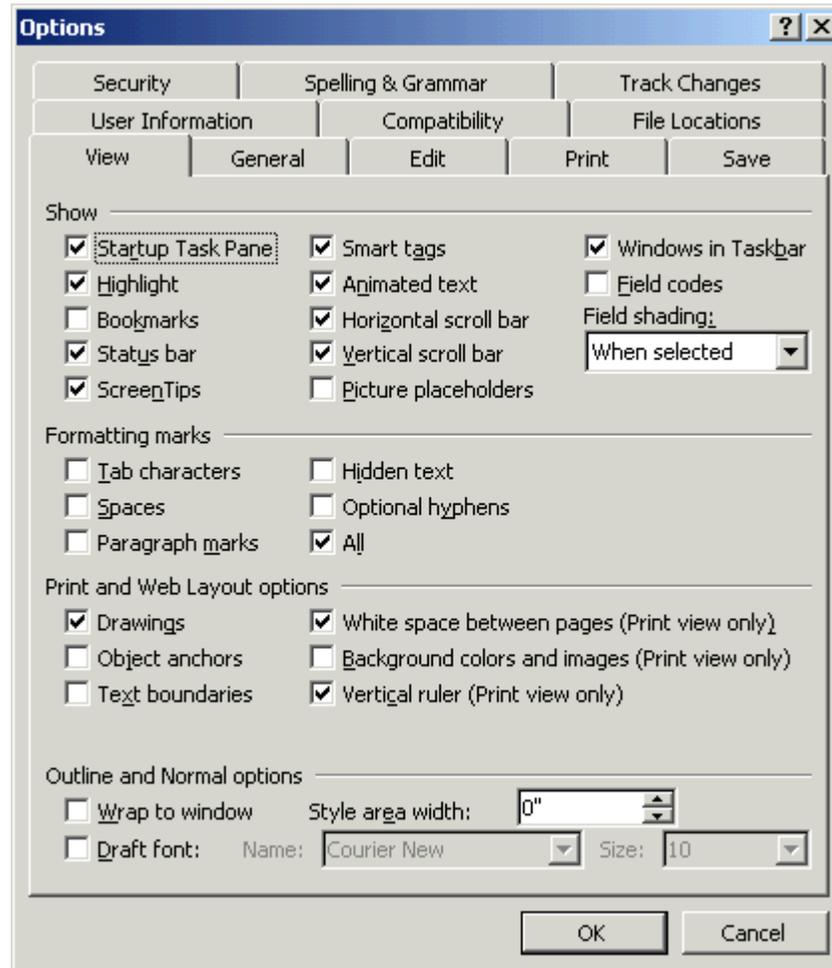
Note that there are various tabs, one for each set of options you can set for your individual copy of MS Word on your workstation.

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7.1.2 Select the **User Information** tab by <u>clicking</u> on it.

The Options window *will then appear* similar to what is shown below.

<u>Note</u>: The field that is used in electronic signatures is "**Initials**".

7.2   How to Modify your User Information to be Suitable for Electronic Signing

7.2.1   Click into the "**Name**" field. …

Among other uses, the text in this field populates (automatically fills in) the "Author" field under the "Properties" information when you create a new MS Word document.

Enter your full name in any way you choose, same or mixed case, long or short, no matter (since this field will not be used for electronic signatures).

7.2.2   Click into the "**I̲nitials**" field, then enter, in **all upper case**, any combination of letters and numbers (optional) that will <u>uniquely identify you</u>, but is **not** easy to duplicate by others.

You have *9 characters available*, and it is suggested that you <u>always use all *9*</u> for maximum uniqueness and difficulty for others to guess, as shown in the below example.

Using the above example of "Dirk Aventurasta", here are some examples that would be "difficult to guess" by someone looking to forge your electronic signature mark:

- DIRK81AV
- D346AVEN
- DI5AVENT

The idea is to make it as difficult as possible for someone to guess your "I̲nitials" content.
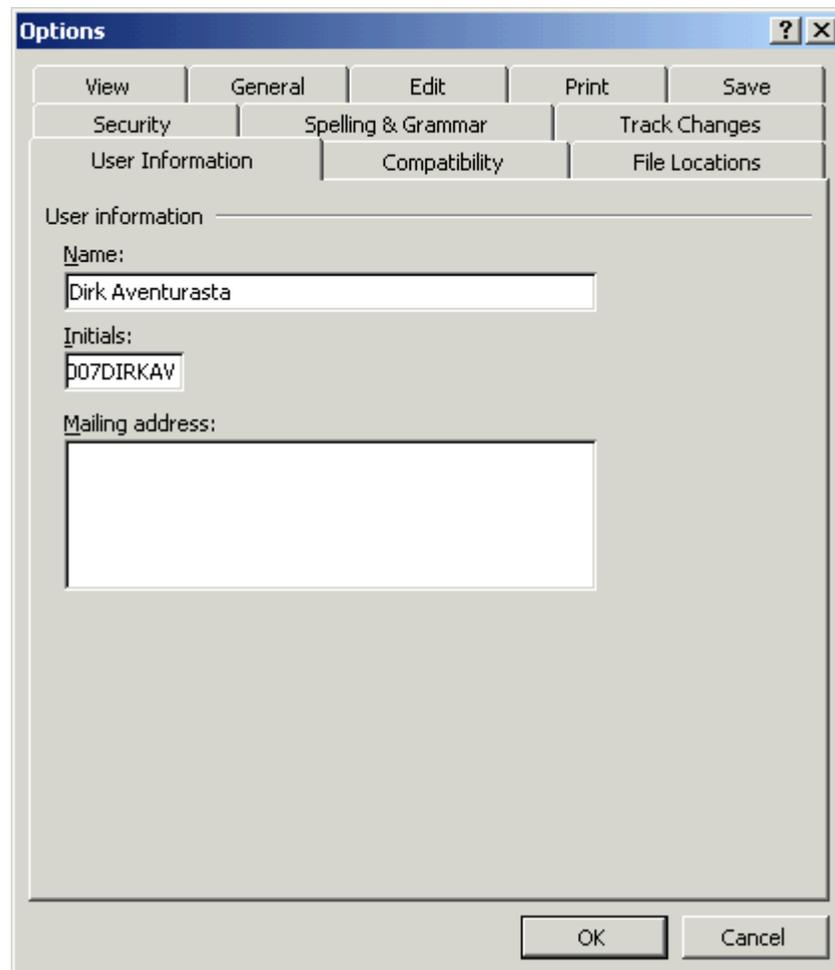
7.2.3   Click on the **OK** button or press the **Enter** key to <u>save</u> the User Information changes you have entered above.

You have now completed setting up your workstation copy of MS Word so that you can electronically "sign" documents per STBIZ standard procedures.

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8.0   Records

- Desktop workstation copies of MS Word with User Information set up per this instruction.