



Creating a Digital Signature

BlueStep™ Digital Signature

BlueStep™ now offers the security of online digital signatures. Digital signatures are a reliable way to attach your valid acceptance, verification or authorization to an electronic document. This important feature provides another layer of protection to your most critical data and assures vital information is reviewed, authorized or verified by the responsible individuals.

There are two types of signatures:


- The simple signature that, when checked, provides a name and stamped date/time which cannot be changed and can only be removed by an organization administrator. This signature is a feature of Relate™ and HQ™.
- The notarized digital signature in a legally-binding electronic format that, when entered, provides a name and stamped date/time, which cannot be changed and can only be removed by an organization administrator. This signature is a feature of HQ™ only.

Of these two, the notarized digital signature offers the much greater protection of a secure, individual passphrase and a notarized account held outside of your organization, within BlueStep's corporate structure. However, the simple signature offers convenience and ease-of-use for non-legal verifications, while maintaining the integrity of data entered into your organization's records.

In both cases, the beginning step to incorporating a signature into your data system is to add a signature field to the requisite forms.


Adding a Signature Field

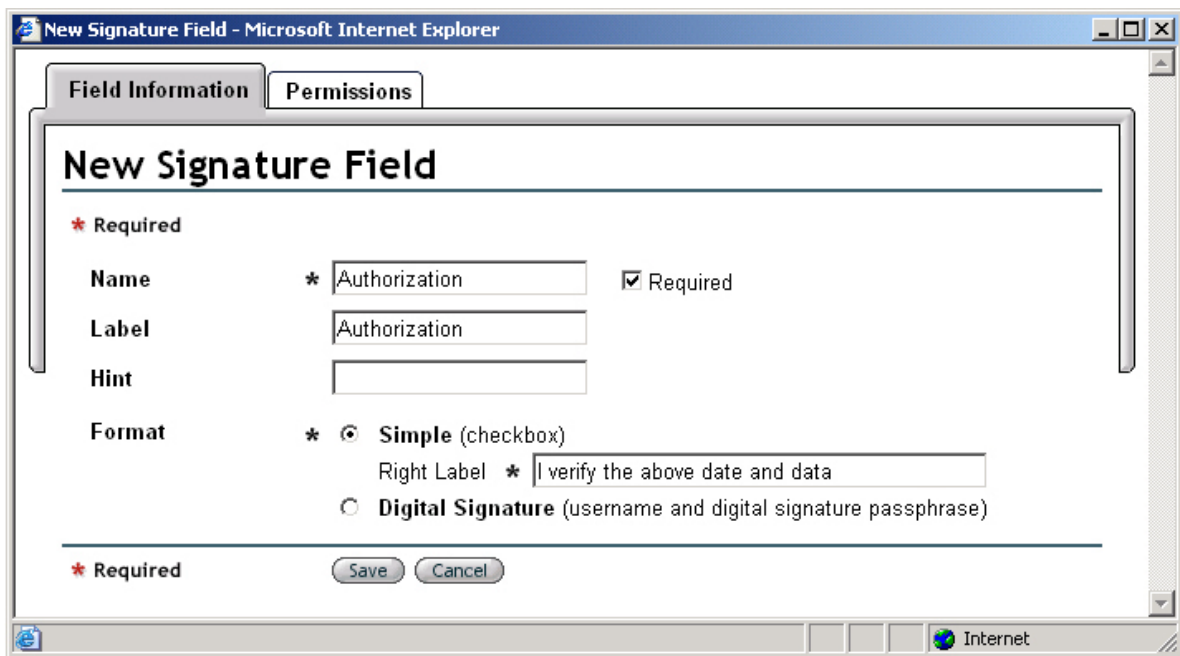
Simple Signature

Users who have a Relate™ license can add a simple signature field to any Relate™ form where it is appropriate. To add a simple signature field, navigate to Relate™ and click the Relate Forms link on the Admin drop-down. Click on the edit pencil icon  opposite the name of the desired form. You may also add this field to a new form during its creation.

When the Edit Form or New Form screen returns, make entries as desired, then look for the New Data Field button on the lower right. Mousing over this button produces a drop-down of all the available field types, seen below.




Select the Signature Field link. On the resulting screen enter values for all fields as desired, then choose the Simple radio button (which provides a checkbox on the resulting form) and enter any desired value in the Right Label field, as in the example below. The contents of the Right Label field will be displayed on the form and will provide explanation to the signatory as to what he or she is signing, agreeing to or verifying. When done, click the Save button  at the bottom of the screen.



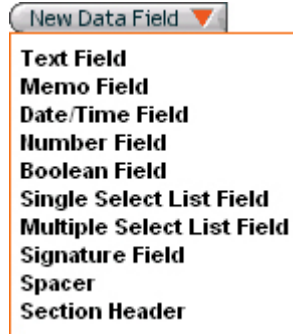
When all aspects of the form have been created and the fields are in the correct order, click the Save button at the bottom of the New Form or Edit Form screen. This will post all new fields and any other changes you have made to the form.


There is no limit to the number of signature fields that can be added to a form and creating a signature field on one form does not preclude creating signature fields on as many other forms as needed. Also, both simple signature and digital signature fields may be used on the same forms or applied to the same records, as needed; however, digital signatures are only available for use within HQ™.

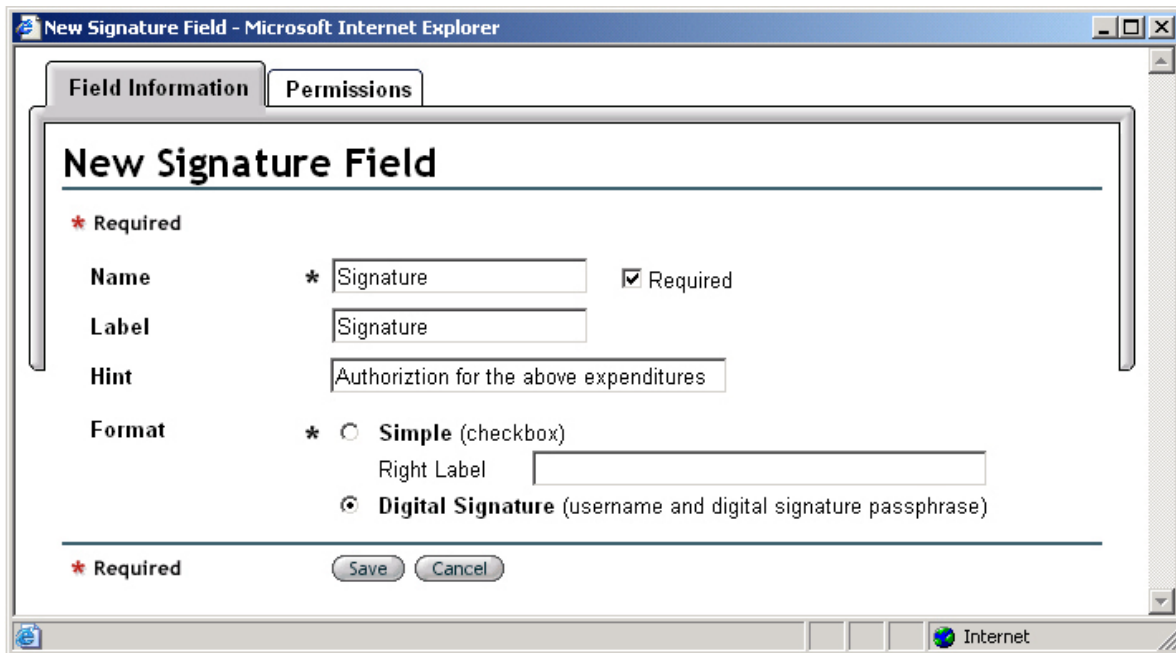
Notarized Digital Signature

HQ™ users who have a Relate™ license can add a notarized digital signature field to any Relate™ form where it is appropriate. To add a digital signature field, navigate to Relate™ and click the Relate Forms link on the Admin drop-down. Click on the edit pencil icon  opposite the name of the desired form. You may also add this field to a new form during its creation.

When the Edit Form or New Form screen returns, make entries as desired, then look for the New Data Field button on the lower right. Mousing over this button produces a drop-down of all the available field types, seen below.



Select the Signature Field link. On the resulting screen enter values for all fields as desired, then choose the Digital Signature radio button (which will ask the user for his username and digital signature passphrase on the resulting form), as shown in the example below. When done, click the Save button  at the bottom of the screen.



When all aspects of the form have been created and the fields are in the correct order, click the Save button at the bottom of the New Form or Edit Form screen. This will post all new fields and any other changes you have made to the form.




Applying for a Digital Signature

Using the simple signature requires no action on the part of users except for filling out the form to be signed and checking the signature checkbox when appropriate. However, a notarized digital signature requires that the HQ™ user set up a digital signature account before being allowed to digitally sign documents.

To do this, log in to HQ™ as usual and click the My Profile link at the top right of the screen. On the left-side navigation menu, select the [Digital Signature](#) link. On the resulting screen the signature steps are outlined as follows:

- Verify your name and contact information
- Enter a digital signature passphrase
- Print and complete the BlueStep Digital Signature agreement (Read, sign, notarize and mail the agreement to BlueStep)
- Upon receiving the agreement, BlueStep will activate your BlueStep Digital Signature account and you will be notified by e-mail.

When you have read through the steps, click the Next button  at the bottom of the screen and you will automatically begin the signature account process.

On the resulting screen, your information as entered into your database record will be displayed, as in the example below.

Verify Your Information

Please verify the following information. If any of the information is inaccurate, click the 'Change My Information' link, update your information, then return to this page.

First Name	Janet
Last Name	Watson
Email Address	jwatson@anats.com

[Change My Information](#)

If there is a problem with any of the information, click the [Change My Information](#) link and make the necessary corrections. Save the information edit page, then return to this screen and be sure that each item is recorded correctly. When done, click the Next button.

On the following screen, example below, enter a passphrase, then retype it to verify. DO NOT use passwords that you use in any other application as a passphrase. DO NOT use a passphrase that can be surmised by those who know you or have access to your personal records.



In particular, guard against hackers who have tips and tricks for gaining the confidence of business personnel with access to your records and/or the expertise to acquire backdoor personal information. In general, do not use your name, birth date, birth city or state, anniversary date, height, weight, age, graduation date, etc. or any of this same information regarding your spouse/children/parents as a passphrase. In the example below, the name of a TV sitcom family (not on current broadcast) was selected. This passphrase is not related to personal information that could be accessed or guessed by a hacker.

Digital Signature Passphrase

*A Digital Signature Passphrase is required to use your BlueStep Digital Signature, and you will be prompted for it every time you "digitally sign" a document. **If you forget or lose your Digital Signature Passphrase you will have to re-activate your account.***

New Passphrase	*	<input type="password" value="*****"/>
Verify New Passphrase	*	<input type="password" value="*****"/>
Passphrase Hint	*	<input type="text" value="sitcom family"/>

* Required

Next

Cancel

In the third field, enter a hint word or phrase that will remind you of the passphrase should you forget. If the hint does not help you remember the passphrase, you will need to re-activate your signature account. Contact BlueStep client care to do so. When done, click the Next button.

On the resulting screen, seen below, a copy of the Digital Signature Agreement is available from the link at the bottom of the screen. This document is in PDF (Portable Document Format) and requires Adobe Acrobat Reader. If you do not already have Acrobat Reader installed on your computer, a link to download a free version of the software is provided in the hint section of the screen header.

BlueStep Digital Signature Agreement

The BlueStep Digital Signature Agreement is in PDF (Portable Document Format) and you will need the Adobe Acrobat Reader software to open it. If you don't have Acrobat Reader, [click here to download Adobe Acrobat Reader for free.](#)

Print the BlueStep Digital Signature Agreement by clicking on the link below. Complete the process by following the instructions printed on the form. You will be asked to read, sign, notarize and mail the agreement to BlueStep.

[BlueStep Digital Signature Agreement](#)

Next

Cancel



Open the agreement from the [BlueStep Digital Signature Agreement](#) link and print it. Read the agreement conditions. Sign, date and have the agreement notarized in the appropriate areas, then mail the completed **original** document to:

BlueStep Digital Signature
563 West 500 South, Suite 170
Bountiful, Utah 84010

Please note that the agreement is not in force and will not be honored by BlueStep if it is received without notarization. Unfortunately, faxed or photocopied documents are not legally acceptable.

When the agreement has been received by BlueStep, a client care specialist will activate your digital signature. You will receive notification by e-mail that the account is active and you now have the option of appending your digital signature to any necessary documents.

Using Signature Fields

Signature fields that have been added to on a form will appear as a checkbox in one of two ways, as shown below.

Simple Signature

If a simple signature field has been added to the Relate™ form or used in HQ™, it will appear on the form with the field label to the left ('Authorization', in this case), an asterisk if it is a required field, a checkbox for the user to select and the Right Label text ('I verify the above date and data', in this instance), as was configured at the time the field was added to the form. When a user is filling out the form and desires to add a simple signature, he or she clicks the checkbox, followed by the Save button at the bottom of the screen.

Authorization * I verify the above date and data

Digital Signature

If a notarized digital signature field has been used in HQ™, it will appear on the form with the field label to the left ('Signature' in this case), followed by an italicized field hint if one has been added, an asterisk if it is a required field, a field for the user's username and a field for the user's passphrase. When a user is filling out the form and desires to add a digital signature, he or she enters his/her login username (as regularly used to login to HQ™), the digital signature passphrase created for his/her account and clicks the Save button at the bottom of the screen.

Signature * *Authorization for the above expenditures.* Username Signature Passphrase

Once saved, either type of signature field will appear on the form as in the example below. The field name with any associated hint remains as originally shown, but the text and fields to the right have been replaced with the signatory's name plus the date and time signed. In the case of a digital signature, this signature is as legally binding and enforceable as a personally written pen-and-ink signature.

Signature


*Authorization for the
above expenditures.*

* Janet Watson, 04/14/2005 4:46:06PM

Removing Signatures

Neither type of signature can be altered once it appears on a form. However, an organization administrator can remove the signature and require that the form be re-signed by the same or another individual.

To remove an existing signature, the organization administrator must be sure that the signature field in question is not a 'Required' field. If it is, go to the Relate™ form containing the signature field.

Click the edit pencil icon  opposite the field and uncheck the 'Required' checkbox. Save the field and the form.

Return to the signature that needs to be removed. Uncheck the signature checkbox and save the form. Navigate back to Relate™ and reapply the 'Required' constraint to the signature field, if necessary.

If the removed signature is a simple signature, another user may login and re-sign the form immediately or at any time. If it is a notarized digital signature, another HQ™ user may enter his/her username and passphrase (without logging in to HQ™) and re-sign the form immediately or at any time.

Once a form has been signed by either method, edits may still be made to the data on the form; however, the date/time of last modification will appear in the upper right of the screen. Since the signature is date/time stamped, comparing the two will alert you to changes made since the form was signed.



Step-by-Step in Digital Signatures

Adding a Signature Field to a Form

Simple Signature

- In Relate™, select the form where the signature field should appear and click the edit pencil icon
- Select Signature Field from the New Data Field drop-down
- Enter a name into the Name field and in the Label and Hint fields, as desired
- Click the Simple (checkbox) radio button
- Enter explanatory text into the Right Label field
- Click the Save button on the field pop-up and the form screen

Digital Signature

- In Relate™, select the form where the signature field should appear and click the edit pencil icon
- Select Signature Field from the New Data Field drop-down
- Enter a name into the Name field and in the Label and Hint fields, as desired
- Click the Digital Signature (username and digital signature passphrase) radio button
- Click the Save button on the field pop-up and the form screen



Applying for a Digital Signature

- Log into HQ™
- Click the My Profile link at the top of the screen
- Select the Digital Signature link in the left-side navigation menu
- Read the BlueStep Digital Signature Process page and click the Next button
- Verify your personal information
- Make any necessary information changes using the [Change My Information](#) link
- Return to the information screen and click the Next button
- Enter a passphrase
- Retype the passphrase to verify
- Add a passphrase hint
- Click the Next button
- If you do not have Adobe Acrobat Reader installed, click the free Adobe download link
- Click the [BlueStep Digital Signature Agreement](#) link
- Print the agreement form
- Read, sign and date the agreement
- Have the agreement notarized
- Mail the **original** agreement to BlueStep at:
 - BlueStep Digital Signature
 - 563 West 500 South, Suite 170
 - Bountiful, Utah 84010
- Begin using digital signature after you receive e-mail verification that the account is active

Using Signature Fields

Simple Signature

- Scroll to the signature field
- Read the hint, if any, and the right label information
- Click the checkbox
- Click the Save button

Digital Signature

- Scroll to the signature field
- Read the hint, if any
- Enter your username
- Enter your signature passphrase
- Click the Save button

Removing Signatures

- If the signature field is a 'Required' field, navigate to Relate™
- Select the form containing the signature field and click the edit pencil icon
- Uncheck the 'Required' checkbox
- Click the Save button on the field pop-up and on the Edit Form screen
- Return to the signature that needs to be removed and uncheck the checkbox
- Click the Save button
- Reenter the Relate™ form containing the signature field and click the edit pencil icon
- Recheck the 'Required' checkbox
- Click the Save button on the field pop-up and on the form screen