



Plug-In How-To Guide

Microsoft Excel XP - 2003

Copyright © Topaz Systems Inc. All rights reserved.

For Topaz Systems, Inc. trademarks and patents, visit www.topazsystems.com/legal.

Table of Contents

Overview.....	3
Signing in MS Excel.....	3
Naming Signatures	4
Pre-Placing Blank Signature Fields	5
Validating Signatures	6
Location of the TOPAZ.XLA File	7
Troubleshooting Tips.....	7

Overview

The Topaz MS Office Plug-In software allows users to electronically hand-sign an Excel spreadsheet using a Topaz signature pad and pen. Each embedded signature is bound solely to the content of the cells in the spreadsheet at the time it is signed so any changes made to the spreadsheet after signing renders the signature(s) invalid. If the file's content is returned to the state it was when signed, then the signature will once again be valid. A signature is bound strictly to the cells in the sheet it is embedded in. Please note that form fields (such as drop down menus, radio buttons, etc.) are excluded from the binding process.

Please make sure you first install the current version of SigPlus:

www.topazsystems.com/sigplusproactivex.html

Then, install the plug-in at:

www.topazsystems.com/plugins.html

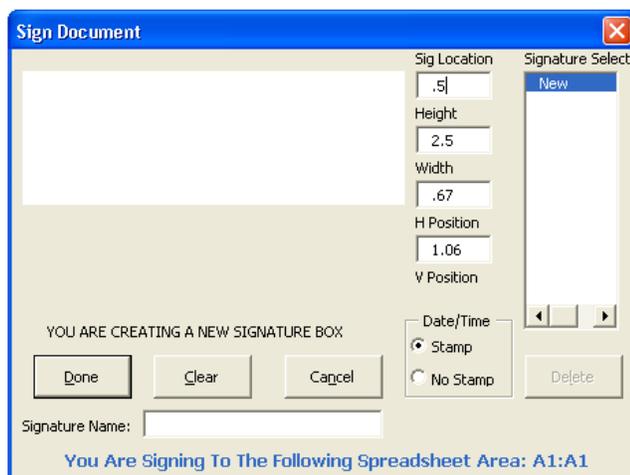
Signing in MS Excel

Click the Pencil icon on the Topaz toolbar, "Topaz: Sign Doc".



If you open Excel and don't see the Topaz toolbar, click on "Tools" → "Add-Ins". In the window that appears, you should see "Topaz Electronic Signatures" listed. Make sure it is checked. If it is checked, but the Topaz toolbar still isn't visible, you can make a new toolbar. Please see the directions in the troubleshooting portion at the end of this document.

The signing window will be displayed once the "Sign Doc" icon in the Topaz toolbar is clicked.



Once the signing window is open, there are a number of options a user can choose:

- The “Cancel” button will cancel the signature event.
- The “Clear” button will clear any signature in the signature window, allowing the user to sign again.
- The “Done” button will bind the signature to the spreadsheet text and then embed it into the spreadsheet.
- The user can name the signature by using the specified field, “Signature Name:”, located below the buttons.
- A time and date stamp can be toggled by choosing one of the “Stamp”/ “No Stamp” radio buttons in the lower right.

When signing in MS Excel, the signature’s top-left edge will be placed at the selected cell.

Naming Signatures

The “Signature Select” box will list all the signatures already embedded in your spreadsheet. The names listed in this box will correspond to the name of a particular signature. If no name was entered during signing, a default listing of SigPlus1, SigPlus2, etc. will be displayed. Each signature’s name can also be found in the bottom right corner of each signature field.



When you highlight a particular signature’s name in the “Signature Select” box, you may delete the signature by clicking the “Delete” button, or make a new signature by signing again and clicking “Done”. Highlighting “New” in the “Signature Select” box will create a new signature. If a user is unsure whether they are creating a new signature field or signing a currently existing one, there is a message below the signature window that indicates the function being performed.



Changing the Size of a Signature Field

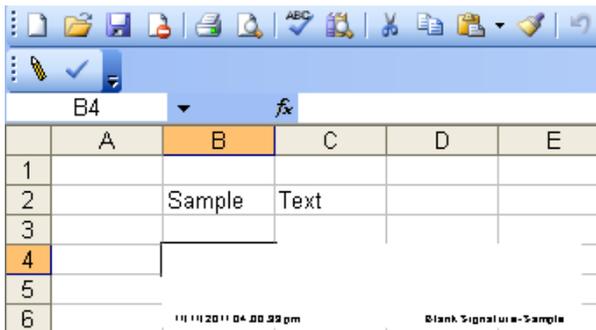
“Design Mode” is a useful tool that can alter the size and location of a signature field, blank or otherwise, to better fit the user’s needs. To access “Design Mode”, click on “View” → “Toolbars” → “Control Toolbox”. “Design Mode” is the first icon on this toolbar.

In “Design Mode”, you can now click on the signature field to position and size it. When finished, make sure to deactivate “Design Mode” by clicking on the “Design Mode” icon.

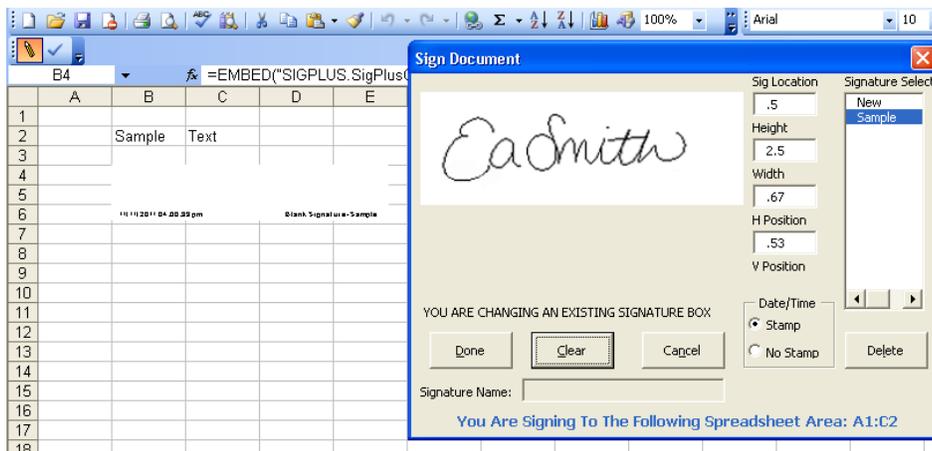
Pre-Placing Blank Signature Fields

A user can also pre-place a blank signature field into an Excel spreadsheet by following these steps:

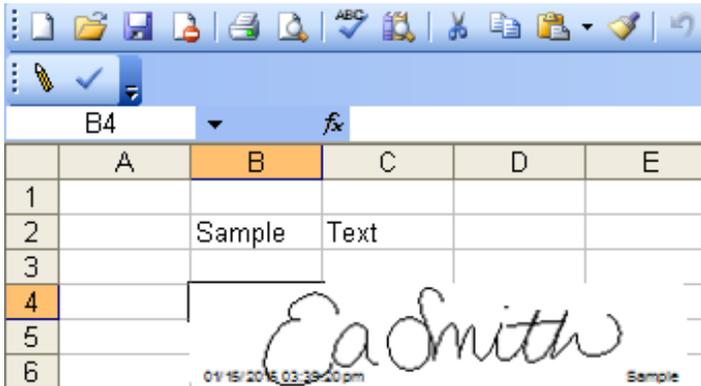
1. Place the cursor in the general location of the desired signature position.
2. Click the “Sign Doc” button, to open the “Sign Document” window. If desired, the user can name the signature and enable/disable the time stamp at this time as well. Click the “Done” button without signing and a blank signature field will be embedded in the spreadsheet.



To sign a blank signature field, click the “Sign Doc” icon. On the right hand side of the “Sign Document” window, you will find the “Signature Select” box. Choose the blank signature field (SigPlus1, SigPlus2, or the user defined name) that you want to sign.



Once the proper blank signature has been chosen, sign and click “Done”. The signature will be placed in the corresponding blank signature field.



The benefits of pre-placed blank signature fields include:

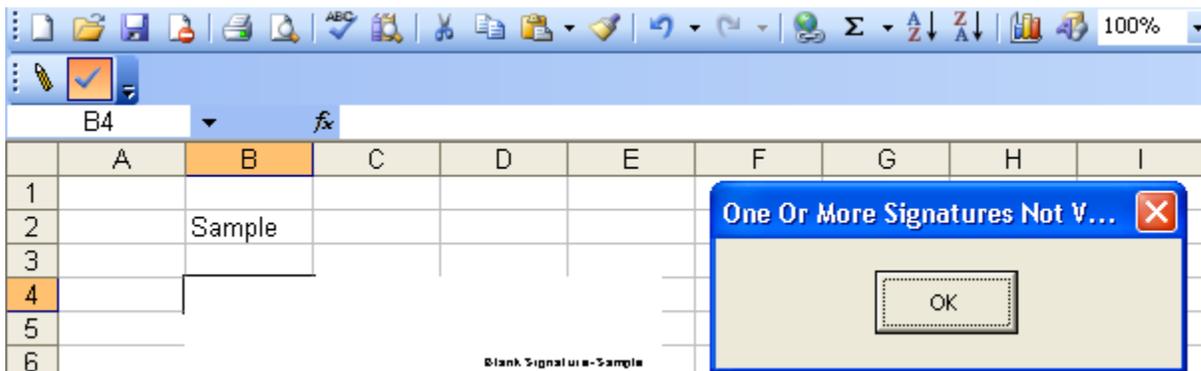
1. Consistent placement and size of signatures.
2. Ease of use as signature placement is independent of cursor position.
3. Dramatic reduction in time needed for signing process.

Validating Signatures

The “Validate Sig” button, located next to the Sign Doc button and denoted by a checkmark icon, will check the validity of each signature in the spreadsheet.



If changes have been made to the textual contents of a spreadsheet after signing has taken place, the signature(s) will be rendered invalid and appear to be blank. If a signature is invalid, the **ONLY** way to restore the signature to a valid state is to return the spreadsheet to the state it was in when signed and click “Validate Sig” again.



Any change to the spreadsheet can render a signature invalid. The “Validate Sig” button can be clicked at any time while the spreadsheet is open, and should be clicked any time the user wants to know the status of the signature(s).

A Topaz eSignature is original biometric data in secure encrypted form residing within the “signature field” on the spreadsheet. A Topaz eSignature is not an image captured by the pad, and therefore cannot be copied and placed into another spreadsheet. There is no way to access the signature, ensuring security of both signatures and spreadsheets.

Any of the following events will trigger signature validation:

1. Pressing the “Validate Sig” button
2. Closing a spreadsheet
3. Saving a spreadsheet
4. Opening a spreadsheet
5. Printing a spreadsheet

Location of the TOPAZ.XLA File

Topaz.xla is an Add-in that can embed e-signatures into Excel spreadsheets. The Topaz.xla file for MS Excel is automatically installed into the location specified by MS Office within the Windows registry. Most often, this is in one of two locations:

<WIN/Application Data/Microsoft/Addins> directory
<Program Files/MicrosoftOffice/Office/Library> folder

Troubleshooting Tips

1. **Do not use date fields when creating spreadsheets. Date fields can auto-update when the spreadsheet is opened. This will cause any signatures within the spreadsheet to become invalid. To avoid inadvertently invalidating signatures, it is best to manually enter dates into a spreadsheet.**
- Q. Printing a signed spreadsheet to a PDF:**
- A. When printing a signed spreadsheet to PDF, there is no guarantee that the signatures within the spreadsheet will be visible in the PDF. Additionally once the spreadsheet is converted to a PDF, any visible signatures within that PDF are no longer eSign compliant. This is because the distillation process from Excel spreadsheet to Acrobat PDF has no means to process Topaz’s SigPlus object, and will attempt to create an image based on the rendered signature. To create eSign compliant signatures in a PDF, download the Topaz Adobe Acrobat Plug-in and sign spreadsheets directly in Adobe Acrobat.

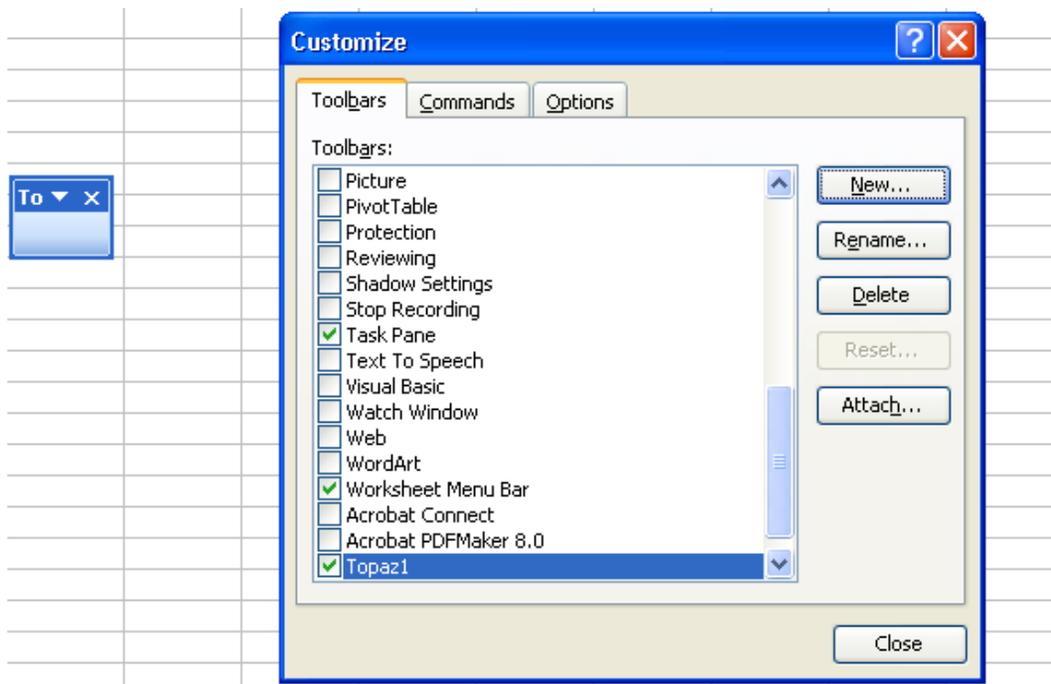
Q. Sending a signed Excel spreadsheet to someone else:

- A. If you want to send your signed Excel spreadsheet to someone else, that person must install SigPlus as well as the MS Office Plug-in. Without that software, they may not be able to see the signature(s), and even if they can see them, they will have no way of determining the validity of the signature(s).

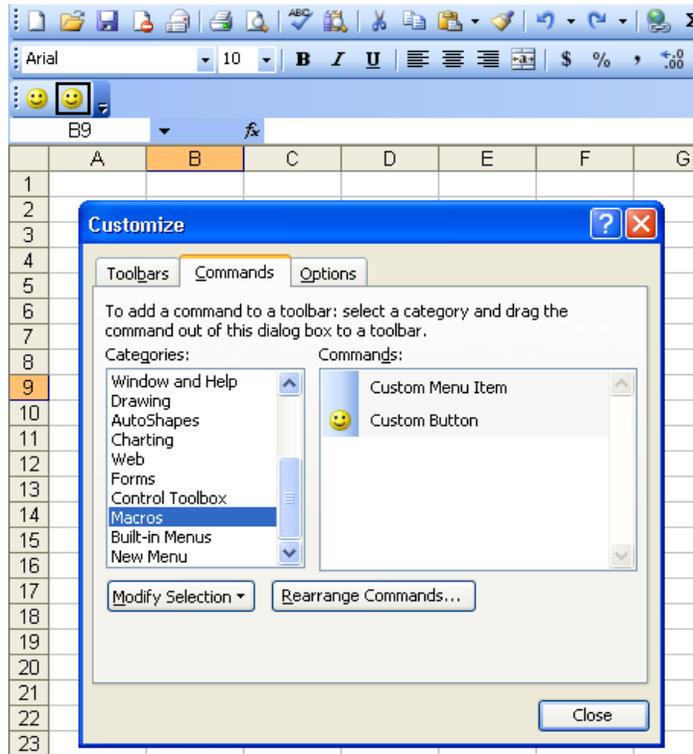
Q. Making a new toolbar:

- A. Click “Tools” → “Add-ins”, and make sure Topaz is listed and checked. If it is and the toolbar doesn't appear, you can make a new one.

Click “View” → “Toolbars” → “Customize”. Then, click the “Toolbars” tab and the “New” button. Name this new toolbar “Topaz1”. Click “Ok”, and this new toolbar will be floating in the document. Click and drag the toolbar up to the top with the other toolbars.



Now click on the “Commands” tab in the “Customize” window and click on “Macros” in the “Categories” list on the left side.



Now that “Macros” is selected, you will see a “Custom Button” on the right side. Drag two of these custom buttons into your new toolbar.

Right-click on the first of your new buttons and choose “Assign Macro”. In the “Macro Name” field, type the following:

`'C:\Program Files\Microsoft Office\OFFICE11\Library\ Topaz.xla!\SignDoc`

Then, click “Ok”. Right-click your other new button and choose “Assign Macro”. In the Macro Name field, type the following:

`'C:\Program Files\ Microsoft Office\ OFFICE11\Library\ Topaz.xla!\ValidateSig`

Then, click “Ok”. The above path names are for Excel 2003. If you are using Excel 2002/XP, use OFFICE10 in place of OFFICE11.

At this point, you can close the “Customize” window and your new toolbar is ready to use.