How-To Guide

Microsoft Excel

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For more information on Topaz signature pads and software, visit www.topazsystems.com.

Overview

The Topaz MS Office Plug-In software allows users to electronically capture a handwritten signature in a Microsoft Excel spreadsheet using a Topaz signature pad and pen. Each signature is embedded and bound to the content of the cells in the spreadsheet at the time it is signed. A change made to any part of spreadsheet after signing renders the signature invalid.

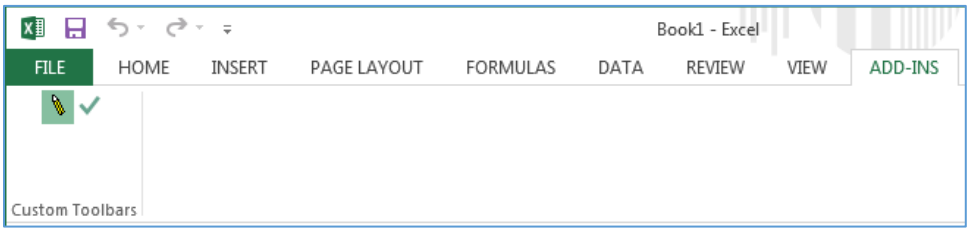
If the file's content is returned to the state it was when signed, then the signature will once again be valid. A signature is bound to the cells in the sheet it is embedded in. Please note that form fields (such as drop-down menus, radio buttons, etc.) are excluded from the binding process.

Note: This Topaz Office plugin is designed for installed versions of MS Office only.

Please make sure you first install the current version of SigPlus: **www.topazsystems.com/sigplusproactivex.html**. When using a 64-bit version of Office, please install the 64-bit version of SigPlus. Then, install the plug-in at: **www.topazsystems.com/plugins.html**.

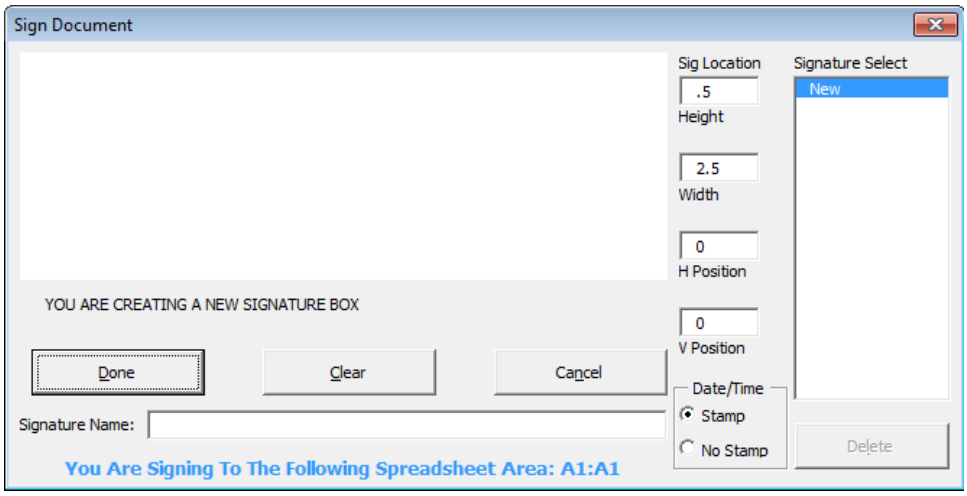
Signing in MS Excel

Go to the "Add-Ins" toolbar and click on the pencil icon, "Topaz: Sign Doc".



Note: If you don't see the "Add-Ins" tab, click on the "File" tab → "Options" → "Add-Ins". At the bottom of the window, change the dropdown to "Excel Add-ins" and click "Go". In the window that appears, you should see "Topaz Electronic Signatures" listed. Make sure it is checked.

The signing window will open once the "Sign Doc" icon under the "Add-Ins" tab is clicked.



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

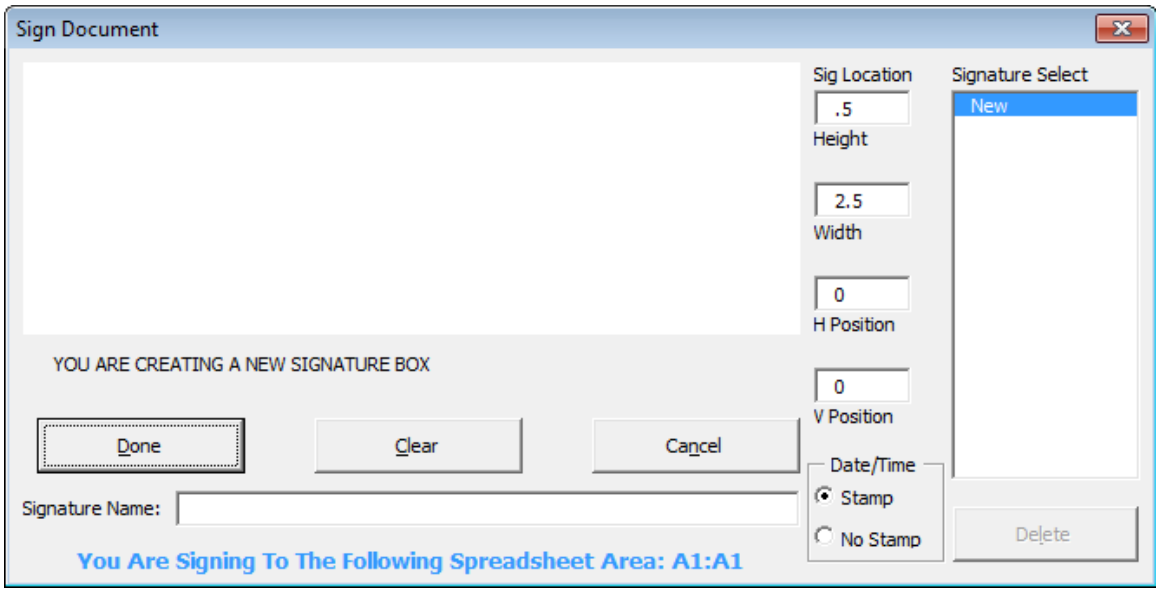
- The "Cancel" button will cancel the signature event.
- The "Clear" button will clear any signature in the signature window, allowing the user to sign again.
- The "Done" button will bind the signature to the spreadsheet's cell content and then embed it into the spreadsheet.
- The user can name the 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", found under the "Developer" tab, 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 the "Developer" tab at the top of the screen. If the "Developer" tab cannot be found along the Ribbon, click on the "File" tab → "Options" → "Customize Ribbon". Select "Main Tabs" from the drop-down menu on the left side of the window under "Customize the Ribbon". You should see "Developer" listed. Make sure that it is checked, and click "Ok".

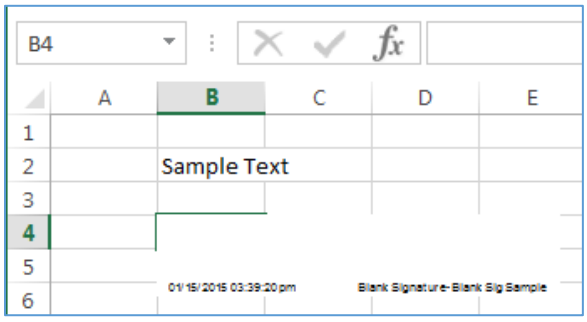
After you have completely exited the options window, "Developer" should appear as a tab at the top of the screen. In the "Developer" tab, click the "Design Mode" icon to activate "Design Mode". In "Design Mode", you can now click on the signature field to position and size it. When finished, make sure 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:

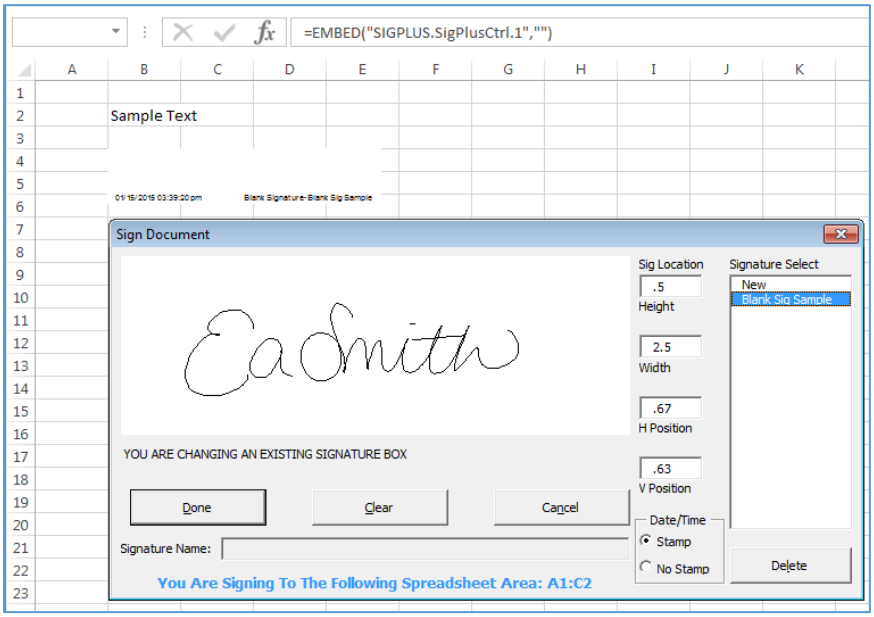
1. Click on a cell in the general location of the desired signature position. Then, click the "Sign Doc" button, to open the "Sign Document" window. If desired, the user can name the signature and enable/disable the time stamp at this time as well.

2. Click the "Done" button without signing and a blank signature field will be embedded in the spreadsheet.

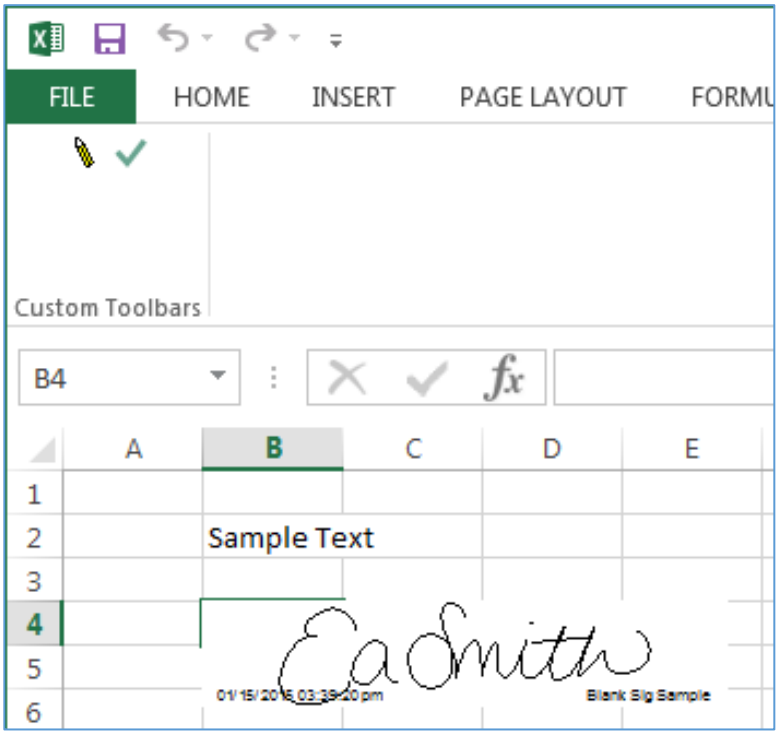


To sign a blank signature field, click the "Sign Doc" icon. On the right-hand side of the "Sign Document" window you will find the Signature Select box. Choose the blank signature field – SigPlus1, SigPlus2, or the user defined name – that you want to sign.

Once the proper blank signature has been chosen, sign and click "Done".



The signature will be placed in the corresponding blank signature field.

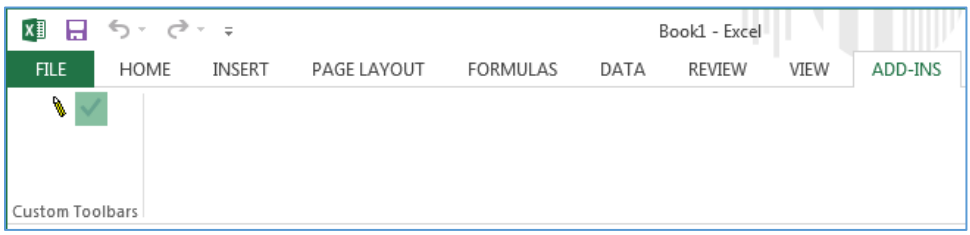


The benefits of pre-placed blank signature fields include:

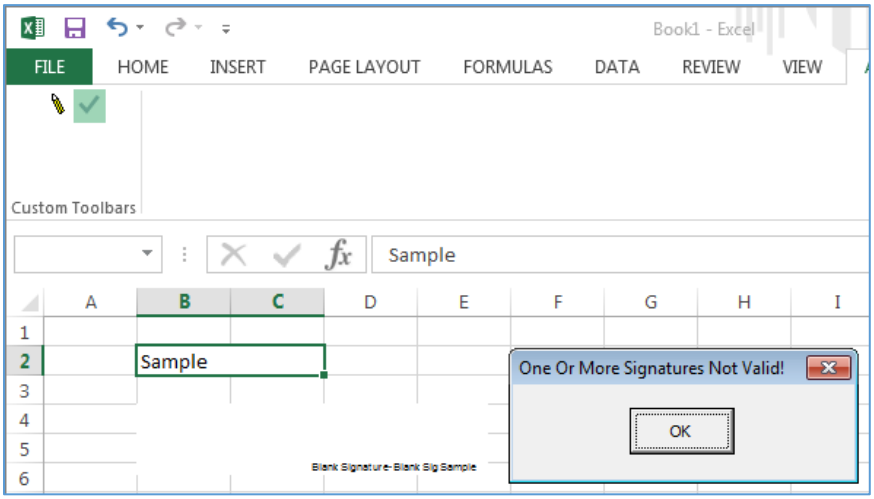
1. Consistent placement and size of signatures.
2. Ease of use as signature placement is independent of cursor position.
3. Dramatic reduction in time needed for signing process

Validating Signatures

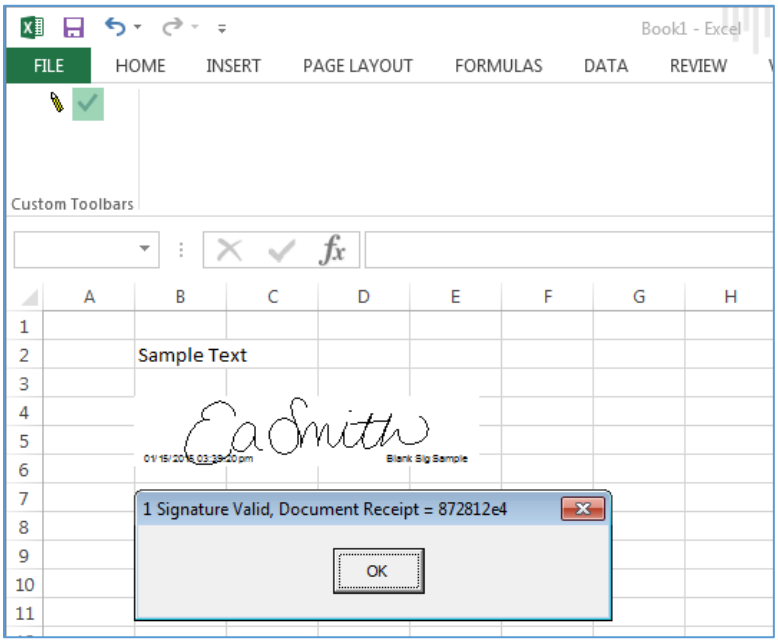
The "Validate Sig" button, located next to the "Sign Doc" button and denoted by a checkmark icon, will check the validity of each signature in the spreadsheet.



If changes have been made to the data in the cells of a spreadsheet after signing has taken place, or if data has been added to new cells, the signature(s) will be rendered invalid and appear to be blank.



If a signature is invalid, it may be possible to restore the signature to a valid state by returning 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).

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.XLAM File

Topaz.xlam is an add-in that can embed eSignatures into Excel spreadsheets. The Topaz.xlam 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/Microsoft Office/Office/Library> folder

Office 365
64 bit <C:\Program Files\Microsoft Office\root\Office16\ Library>
32 Bit <C:\Program Files (x86)\Microsoft Office\root\Office16\ Library>

Troubleshooting Tips

Note: 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).