

IntegriSign for MS Excel

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1. Introduction

An IntegriSign plug-in allows you to create a document and sign it electronically with your handwritten signature using a Signature Capture Device. The plug-in facilitates:

1. **Signature Capture** - The signature trace is captured and stored on the electronic document in a signature object.
2. **Content Hashing** - The signature object is bound to the contents of the document such that any alteration of the document after signing it would render the signature invalid.
3. **Document Verification** – The document can be verified to ensure its integrity (i.e., confirming that it has not been tampered) after the act of signing.

2. Using IntegriSign in MS Excel 2003

When IntegriSign Desktop is installed onto a system, plug-in for MS Excel is automatically installed. On opening the application, you will be able to view the following icons

Sign Document 
Preferences

The same options can also be accessed from the 'IntegriSign' drop down menu from the main menu of the MS Excel application.



2.1 Creating a Signature

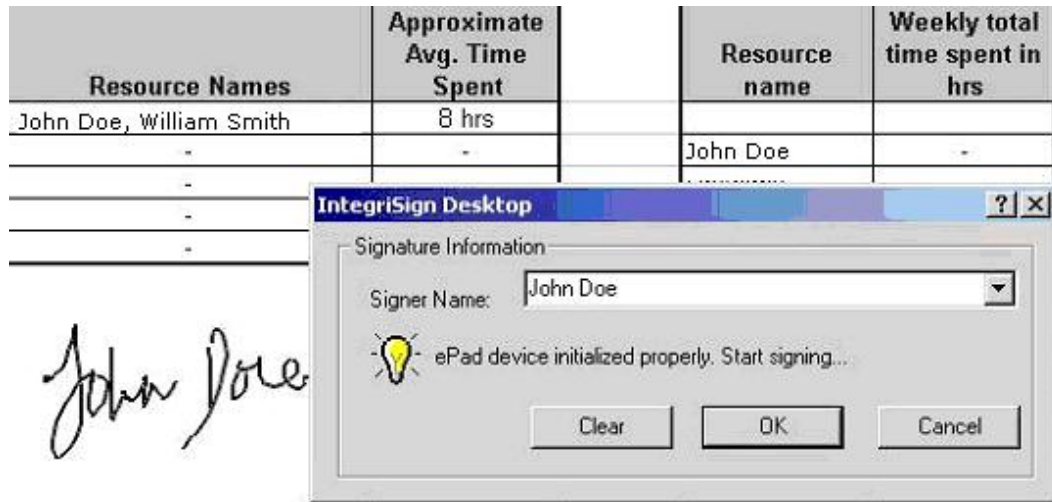
Signing in MS Excel using IntegriSign can be accomplished by using the 'Sign Document' option.

Sign Document

1. Make the entries in the Excel Sheet and compose the workbook.
2. Create sheets, depending on requirement (for more info see *Sheetwise Signing*)
3. Place the cursor on the Sheet that requires a signature and click on the '**Sign Document**' button.



4. A window with the title 'Authenticate' is displayed which presents the signer with the option of authenticating a specific sheet or the entire workbook.
5. Choose single or multiple sheets for workbook authentication.
6. Clicking on 'OK' will place a signature placeholder with the words "Double-click to Sign". Double-click this placeholder to sign the sheet.
7. The signature capture screen is now displayed to capture inputs from the Signature Capture Device.



8. Select the Signer name from the list for a registered signer or in case of Public Signing (e.g. customer signing) signer can just enter name in the Signer Name field.
9. Sign using the Signature Capture Device. As the signing continues, the signature trace is shown on the signature placeholder. To apply the signature on to document click on the 'OK' button, to clear the signature click on 'Clear' Button and to cancel the Act-of-Signing click on 'Cancel' button in the dialog displayed.

In addition to the basic functions mentioned in the Introduction, IntegriSign MS Excel Plug-In also has the following features:

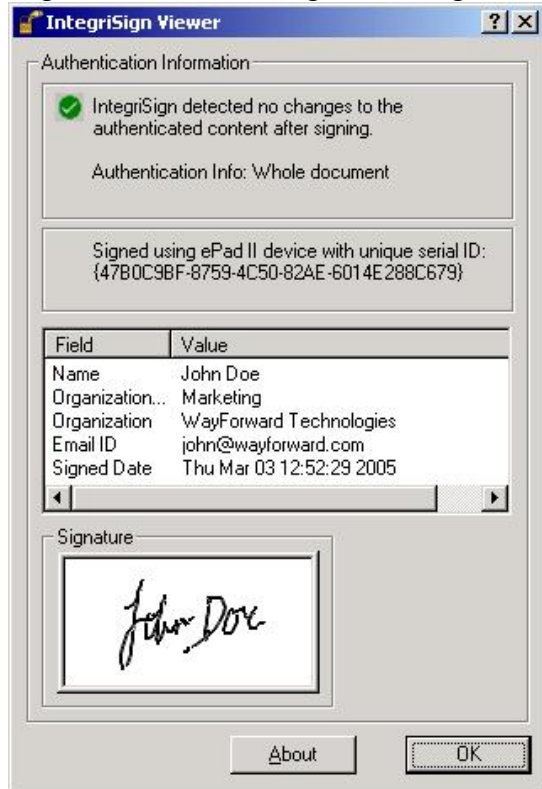
2.2 Sheetwise signing

The IntegriSign MS Excel Plug-in allows you to create multiple sheets in a workbook such that each sheet is treated as an independent workbook. This is especially useful in cases where the same Excel sheet/workbook is being signed by multiple signers and should permit a second or third signer to add comments without affecting the first signer's signature. For example the first signer (e.g. John) can create a sheet and authenticate it with his signature and forward it to the

second signer (e.g. Nancy), who can then add her comments to the second sheet and authenticate it with her signature and so on.

2.3 Workbook Verification

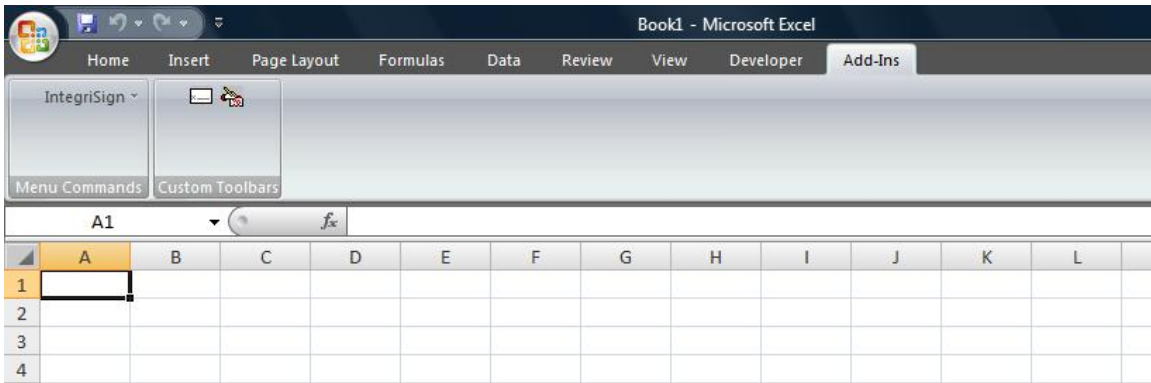
1. Double-click on the signature in the sheet.
2. A window is displayed with the image of the current signature, Signature Capture Device information and the signer information.
3. If the sheet is modified after signing, then the signature on the sheet is invalidated with a cross mark 'X' on the signature. Restoring the changes made to the sheet brings back the signature to its original state.



Signatures in an IntegriSign signed workbook are verified automatically in Save and Print events.

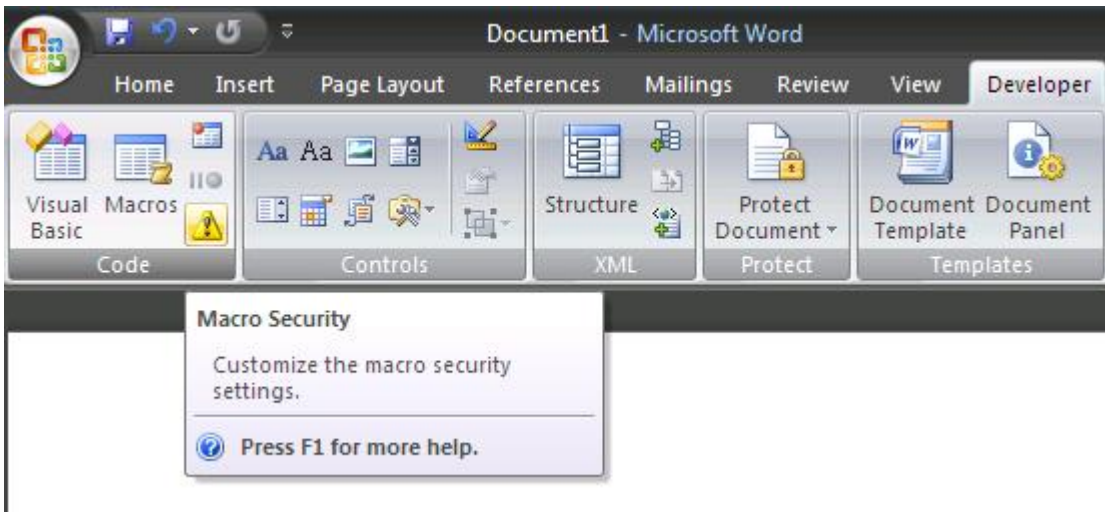
3. Using IntegriSign in MS Excel 2007/2010/2013/2016

When IntegriSign Desktop is installed onto a system, plug-in for MS Excel 2007/2010/2013/2016 is automatically installed. On opening the application, one will be able to find the IntegriSign menus and toolbars under “Add-ins” menu as shown below.



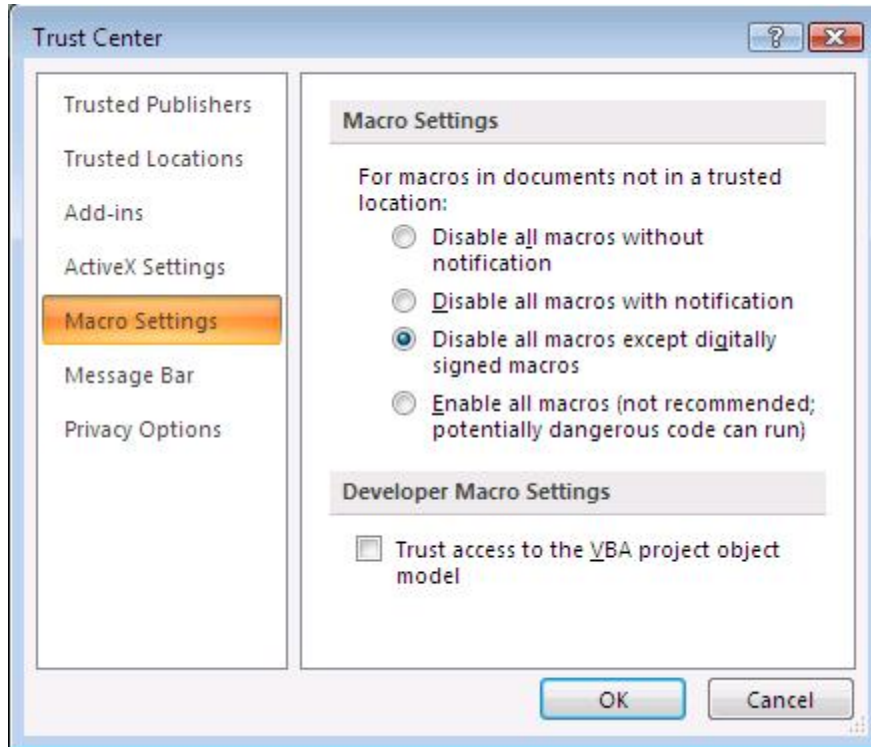
3.1 Macro Security Settings

For IntegriSign to properly work in Excel 2007, one needs to change the default macro security option. To change the Macro Security settings click on “Developer” menu and then click on “Macro Security” button (i.e. “Yellow Exclamation” button) under “Code” group. For reference, see the image below.



In the case of Excel 2010/2013/2016, click on “File → Options” menu item and in the displayed window, select “Trust Center” in the left hand side pane. Select “Trust Center Settings” and then click on “Macro Security” option in the left hand side pane. For reference, see the image below.

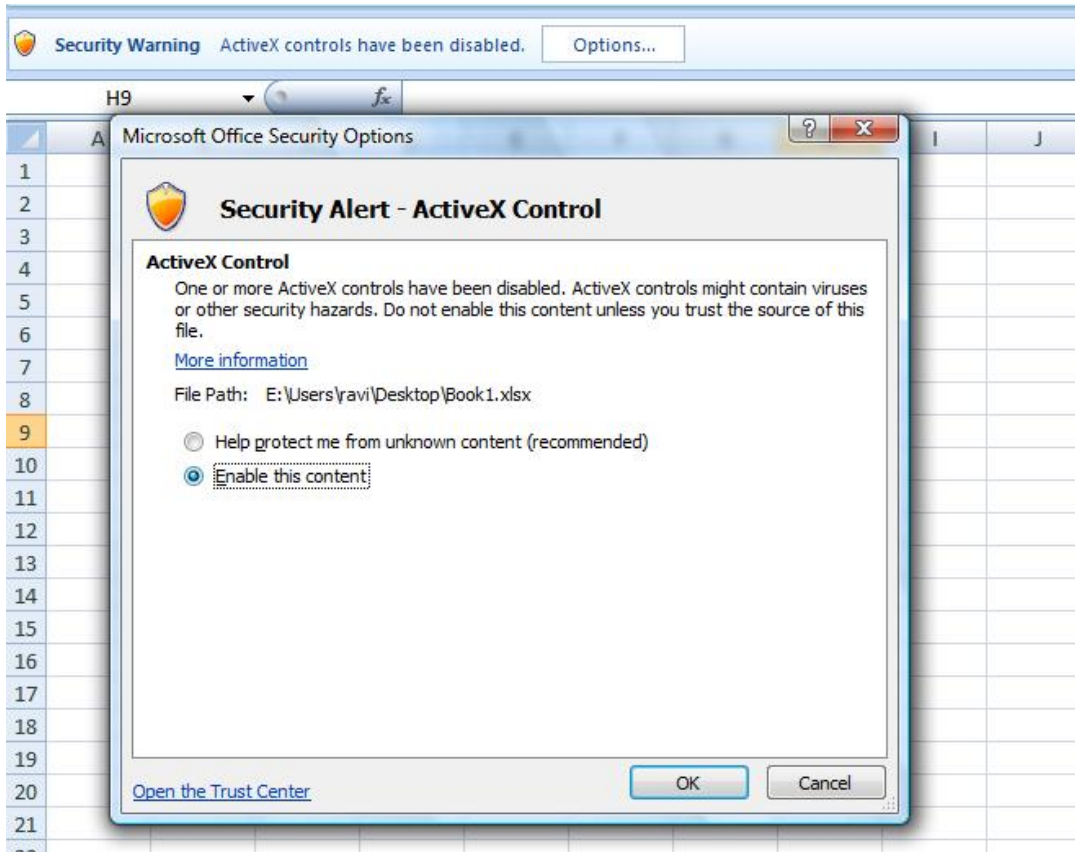
IntegriSign macros are digitally signed. Hence, change the setting to “Disable all macros except digitally signed macros” as shown below.



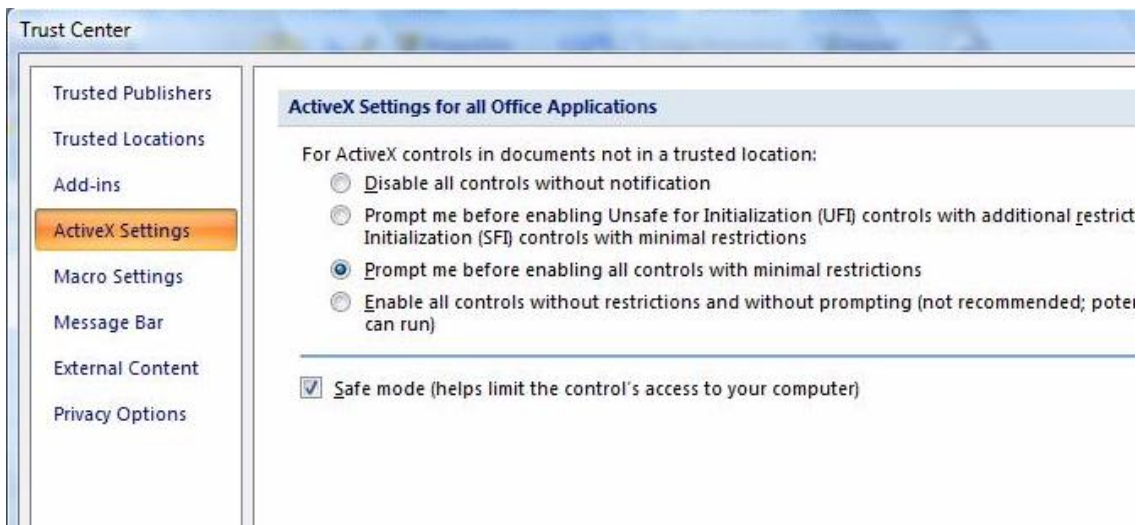
Once the above setting is applied, close and open MS Excel 2007/2010/2013/2016. Upon opening, if you are prompted with a macro dialog as shown below, click on “Trust all from Publisher” or “Enable Macros”.



Upon opening a signed Excel Spreadsheet, you might be prompted with a message bar saying “Security Warning ActiveX controls have been disabled.” Followed by a button named “Options...”. When one clicks on the button, the following dialog is displayed.



Select “Enable this Content” from the dialog. Also click on the “Open Trust Center” link provided at the bottom. This will bring up the “Trust Center” window. Under “ActiveX Settings”, select “Prompt me before enabling all controls with minimal restrictions” as shown below.



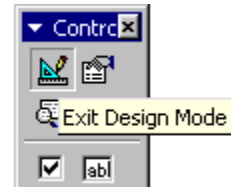
In Excel 2010/2013/2016, instead of the above dialog, you might be prompted with a message bar saying “Security Warning ActiveX controls have been disabled.” followed

by a button named “Enable Content”. One needs to click on the button to proceed further.

4. Troubleshooting

If you are using Excel 2003:

Before you begin signing in Excel, you must ensure that you exit design mode by clicking on the “exit design mode” icon in the control toolbox bar. **(Please note that without exiting design mode, you will be unable to use IntegriSign Desktop.)**



If you are using Excel 2007/2010/2013/2016:

Before you begin signing in Excel, you must ensure that the “Design Mode” icon present in the “Developer” tab is unselected. See the screenshot below.

