

Everything You Need to Know to Use Your Personal Digital Certificate at the Health Science Center

Excel

When properly used, personal digital certificates allow the user to be definitively identified as the sender of an e-mail, as the final authority on a word processing document or spreadsheet, or as the signer of a PDF (Portable Document Format) file. This non-repudiation, especially for PDF files, is frequently used as a suitable substitute for a hand-written signature. In fact, digitally signing PDF files is the preferred format for distribution of certain documents at the Health Science Center.

The following topics are available:

Installing your certificate in your browser (**go here first!**)

Using your certificate with your Outlook 2010 e-mail

Using your certificate with Adobe Reader XI

Using your certificate with Microsoft Word 2010

Using your certificate with Microsoft Excel 2010

In the instructions, names found on windows, panes on windows, or buttons will be presented in ***Arial bold italics***. This will help you navigate and give you something to look for on the screen. Images of screens in this document may vary slightly from your computer, but are representative of the product versions most common at the Health Science Center.

Using your digital signature with Microsoft Office 2010

Microsoft Office and Microsoft Internet Explorer are tightly integrated, and your digital signature must be imported into Internet Explorer before it can be used in Microsoft Office products. If it is not already installed in Internet Explorer, follow the instructions for installing your certificate in the Internet Explorer portion of “*Install your digital certificate in your browser.*”

Once you've properly imported your digital signature into Internet Explorer, you can use it to finalize documents in Microsoft Word and Excel, preventing others from making unauthorized changes. You also have the opportunity to place signature blocks in Word documents and Excel spreadsheets. You can use a signature block as a visible indication of a finalized document or spreadsheet, or you can place multiple signature blocks to get electronic signatures from others.

DRAFT

Microsoft Excel

Finalizing an Excel spreadsheet

When all changes have been incorporated into a spreadsheet, it can be marked as finalized by signing it with a digital certificate. Thereafter, any changes to the spreadsheet will invalidate the signature. Finalize an Excel spreadsheet using the following steps.

1. Make all desired changes to the spreadsheet and save it, then click the **"File"** tab in the upper-left-hand corner of the spreadsheet.
2. Under the **"File"** tab, click the **"Info"** button.
3. In the **"Permissions"** pane, click the down triangle in the **"Protect Workbook"** button.
4. In the pulldown menu, click **"Add a Digital Signature"**.
5. The displayed window will appear each time the digital certificate/signature services in Microsoft Excel are used. Click **"OK"**.
6. In the **"Sign"** window, put a brief reason for signing the spreadsheet in the **"Purpose for signing this document:"** text box.
7. Make sure your name is shown next to **"Signing as:"**. If it is, go to Step 9. If not, click the **"Change"** button.
8. In the **"Windows Security"** window, click on your name and click the **"OK"** button.
9. Your name should now show next to **"Signing as:"**. Press the **"Sign"** button.
10. The operating system will confirm your choice to sign the spreadsheet. When the **"Request for Permission to Use a Key"** window appears, click the radio button next to **"Grant permission"** and click the **"OK"** button.
11. Depending on the speed of your computer, you may see a **"Signature"** window with a sliding bar. The window will close automatically when the spreadsheet has been successfully signed. This window may not appear for faster computers.
12. A **"Signature Confirmation"** window will appear. Your spreadsheet is finalized with your digital certificate. Click the **"OK"** button.
13. The display in the **"Info"** pane under the **"File"** tab will now show the spreadsheet has been signed and marked as final. The spreadsheet can now be closed.
14. When a user opens the signed spreadsheet, a yellow bar will appear showing it has been **"Marked as Final"**.
15. On the status bar at the bottom of the spreadsheet, a red ribbon will appear indicating the spreadsheet has been digitally signed.

16. Clicking on the red ribbon will open the **“Signatures”** pane on the right side of the spreadsheet screen. It will show the name associated with the digital certificate.
17. The name can be clicked on and a down triangle will appear. Click the down triangle and click **“Signature Details...”** from the dropdown menu.
18. The **“Signature Details”** window will open. To get more information on the signer of the spreadsheet, click the **“View...”** button.
19. The **“Certificate”** window will open, allowing detailed examination of the digital certificate. This information can be used to verify the authenticity of the certificate. When finished, click the **“OK”** button.

Finalizing an Excel spreadsheet with a visible signature

When all changes have been incorporated into a spreadsheet, it can be visibly marked as finalized with a signature block by signing it with a digital certificate. Thereafter, any changes to the spreadsheet will invalidate the signature. Place a signature block using the following steps.

20. Make all desired changes to the spreadsheet and save it. Place the mouse pointer in the general desired location for the signature block and click the left mouse button; the signature block can be moved to its final location after it has been placed.
21. Click the **“Insert”** tab in the upper-left-hand corner of the spreadsheet.
22. In the **“Text”** pane, click the down triangle next to **“Signature Line”**.
23. In the pulldown menu, click **“Microsoft Office Signature Line...”**.
24. The displayed window will appear each time the digital certificate/signature services in Microsoft Excel are used. Click **“OK”**.
25. Fill out the sections shown in the **“Signature Setup”** window. This information will appear below the signature line in the signature block. When finished, click the **“OK”** button.
26. An unsigned signature block will appear with the information from the previous step. You can now sign the spreadsheet. If the intended signer is someone else, the spreadsheet can now be saved and sent to that person. The spreadsheet is not finalized until it has been signed.

Regardless of who signs the spreadsheet, the process is the same.

27. RIGHT-click in the signature block and a pulldown menu will appear. Click the **“Sign...”** button.
28. The displayed window will appear each time the digital certificate/signature services in Microsoft Excel are used. Click **“OK”**.
29. In the **“Sign”** window, click in the text box next to the large **“X”** and type your name as you would like it to appear on the signature line.

30. Make sure your name is shown next to **“Signing as:”**. If it is, go to Step 32. If not, click the **“Change”** button.
31. In the **“Windows Security”** window, click on your name and click the **“OK”** button.
32. Your name should now show next to **“Signing as:”**. Press the **“Sign”** button.
33. After the digital signature is associated with the spreadsheet, the **“Signature Confirmation”** window will appear. Click the **“OK”** button.
34. The spreadsheet has been finalized and the information for the appropriate digital certificate is shown, including the date the spreadsheet was digitally signed.
35. Images may be used in the signature block instead of typing a name, such as a scanned copy of one’s written signature. When the **“Sign”** window opens (as seen beginning in Step 29), click **“Select Image...”**.
36. In the **“Select Signature Image”** window, navigate to the location of the desired image. Click the name of the image and click the **“Open”** button.
37. An example of how the signature will display will appear. Click the **“Sign”** button after ensuring all other information is correct.
38. As with the typed name in the signature block, the digital certificate will be attached to the finalized spreadsheet. When the **“Signature Confirmation”** window opens, click the **“OK”** button.
39. The spreadsheet has been finalized and the information for the appropriate digital certificate is shown, including the date the spreadsheet was digitally signed.
40. An Excel spreadsheet can also gather multiple signatures by inserting the appropriate number of signature blocks. After the first signature block is inserted, repeat Steps 21 through 26 until the desired number of blocks has been placed.
41. The spreadsheet is considered finalized after the first certificate/signature has been inserted, and the spreadsheet can be forwarded to those who also need to sign it. When the spreadsheet is opened, the yellow bar will show the spreadsheet has been finalized. An additional yellow bar will be displayed if any additional certificates/signatures are required; clicking the **“View Signatures...”** button will move to the location of any unsigned signature