

David Newby Associates'

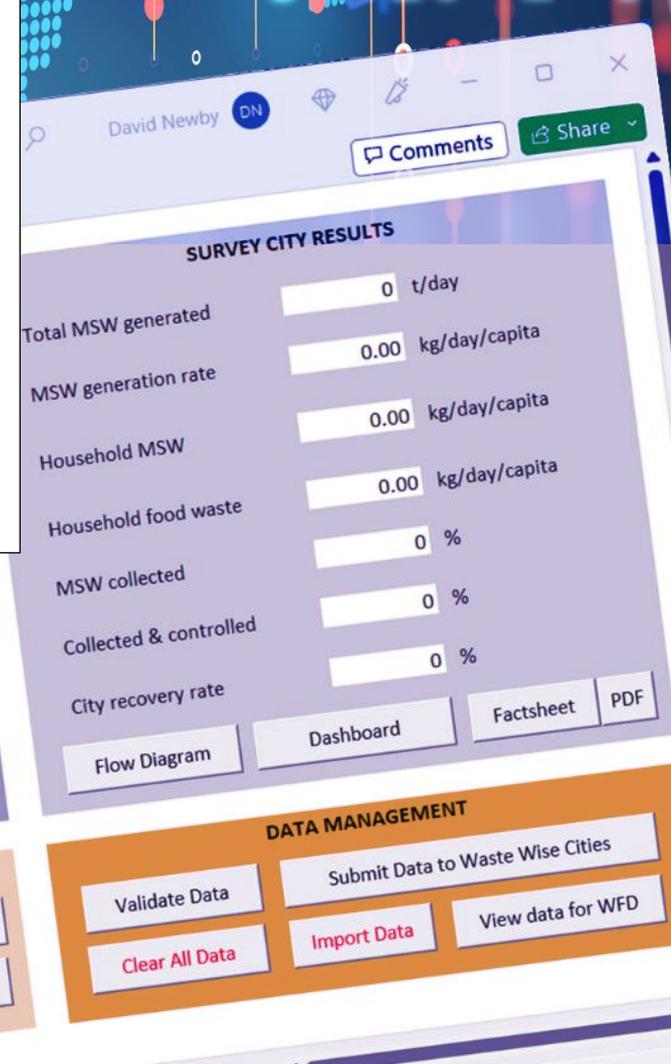
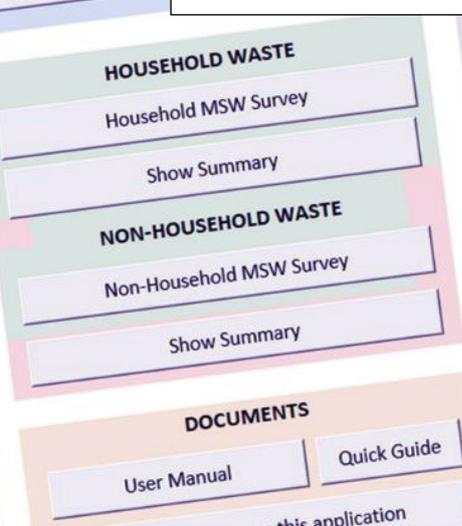
Microsoft Excel Applications

Configuring Excel Security

A number of Microsoft Excel Applications have been developed by David Newby Associates. Typically, the workbooks contain a full Microsoft Visual Basic for Applications (VBA) program (a suite of Excel VBA "macros"). Such Applications include:

- DNA DWMS© Template Documents
- DNA Control Level Assessment Tool
- UN Habitat WaCT DCA
- Data Upload Tool for GIZ WFD Tool
- World Bank PLAST Toolkit.

Revision 1, August 2023



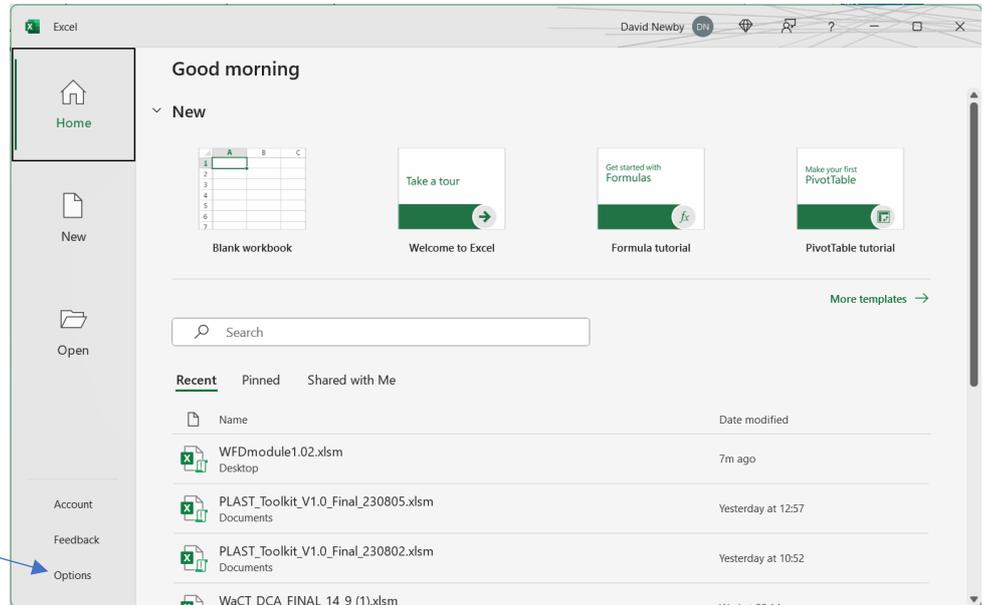
David Newby Associates' Excel Tools and Security

Most Excel applications developed by David Newby Associates (DNA) contain a full MS Office VBA application and a suite of Macros. To use the tool, Excel should be configured to allow the use of Macros and the VBA project object model. We strongly recommend installing the David Newby Associates digital certificate the application is signed with. There are other ways of configuring Excel to run our Excel applications not covered in this guide, contact your IT support if your Excel installation does not allow you full access to the Excel Trust Centre Settings.

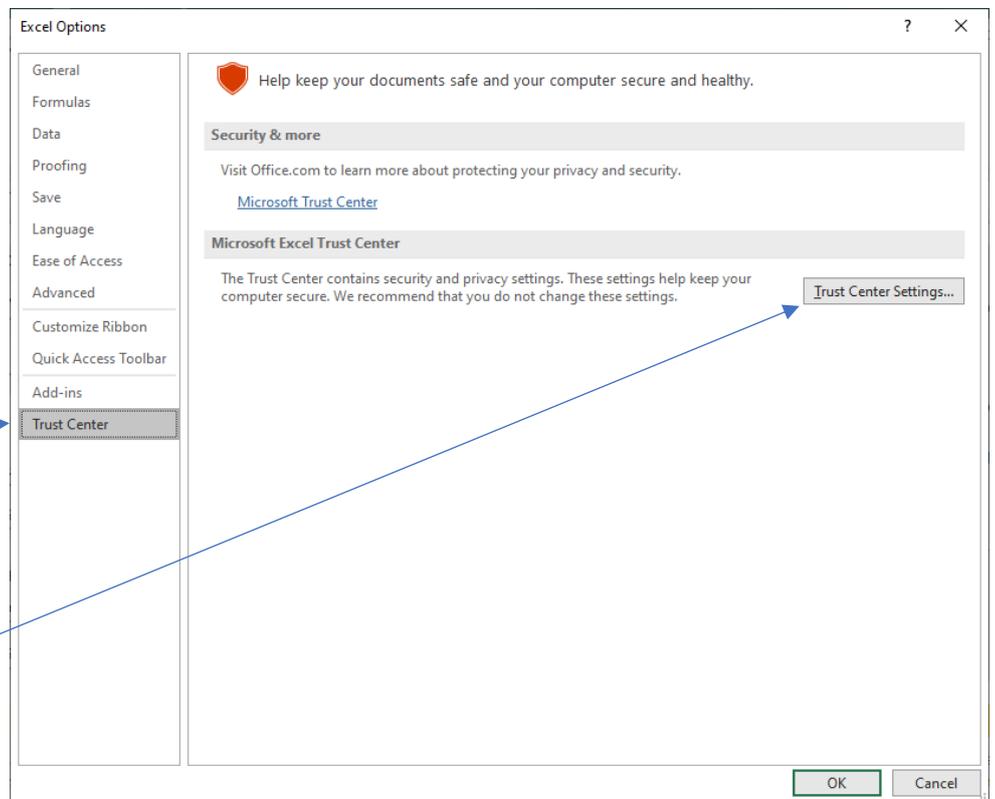
MICROSOFT WINDOWS

Step 1 Configure Settings In The Trust Centre (Windows)

Open Excel most newer versions of Excel open with a display like the one shown on the right, if not, click on **File** in the application main menu to see a similar screen:



1.1 Choose **Options** and you will see the following screen.



1.2 click on **Trust Centre** and you will see the document security screen.

1.3 Then click on **Trust Center Settings..** you will then see the following screen:

1.4 Choose the Macro Settings option.

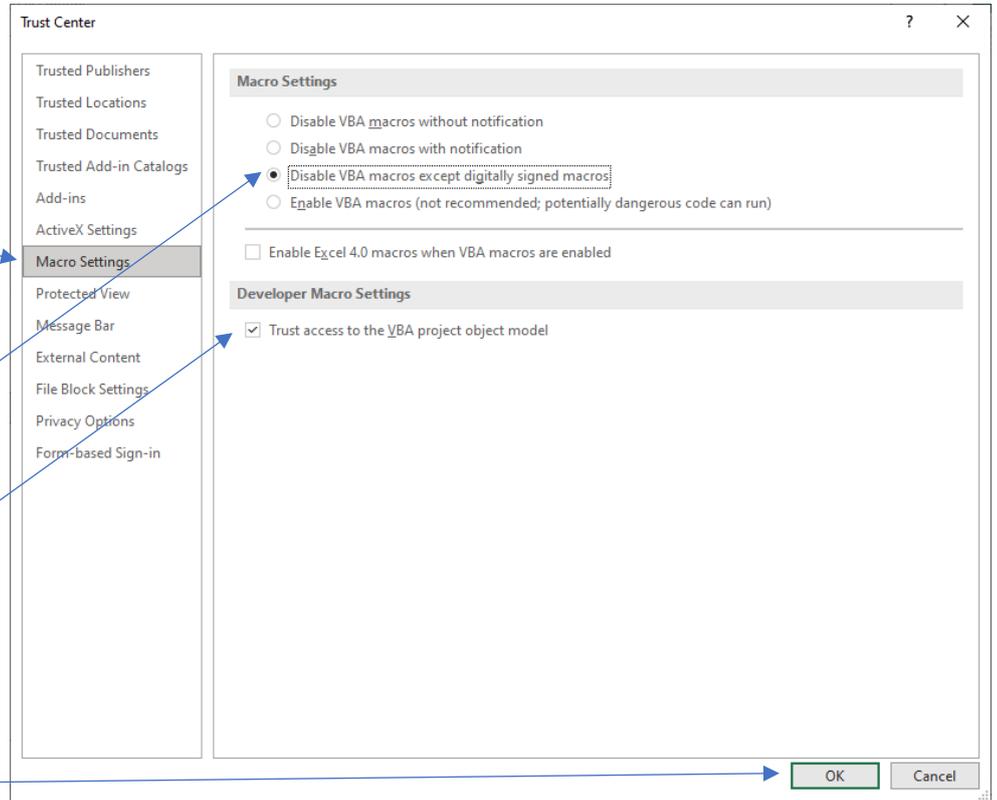
1.5 Select the setting “Disable VBA macros except digitally signed macros”.

1.6 Also tick the option “Trust access to the VBA project object model”.

Do **NOT** tick the option “Enable Excel 4.0 macros” if that option is displayed.

1.7 Click **OK** button to save settings and exit back to the Excel program.

1.8 Close Excel.



Step 2 Open the Spreadsheet Tool / Excel Application and Install DNA Digital Certificate (Windows)

Open the David Newby Associates Excel application, if the David Newby Associates’ developer digital certificate has not already been installed you may get error messages (ignore these), you should see a SECURITY WARNING like:

SECURITY WARNING Macros have been disabled Options...

2.1 Click on **Options..** button.



The dialog box is saying the digital signature is “invalid” because it has not yet been installed using the Excel Trust Centre.

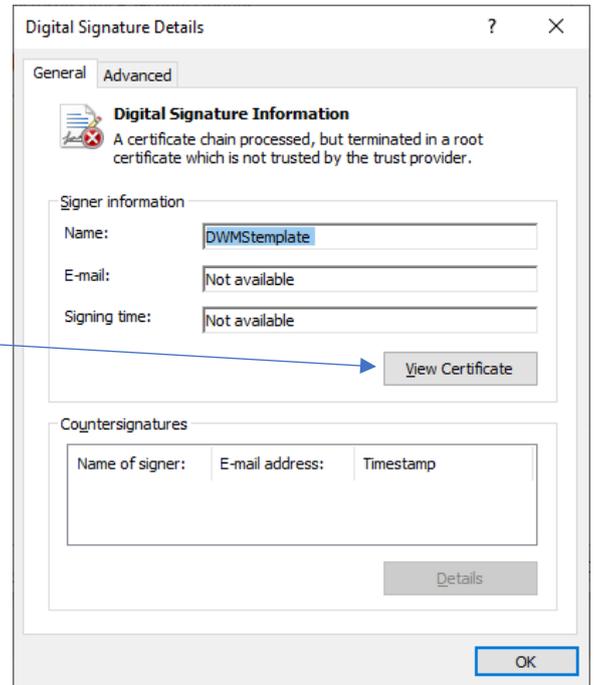
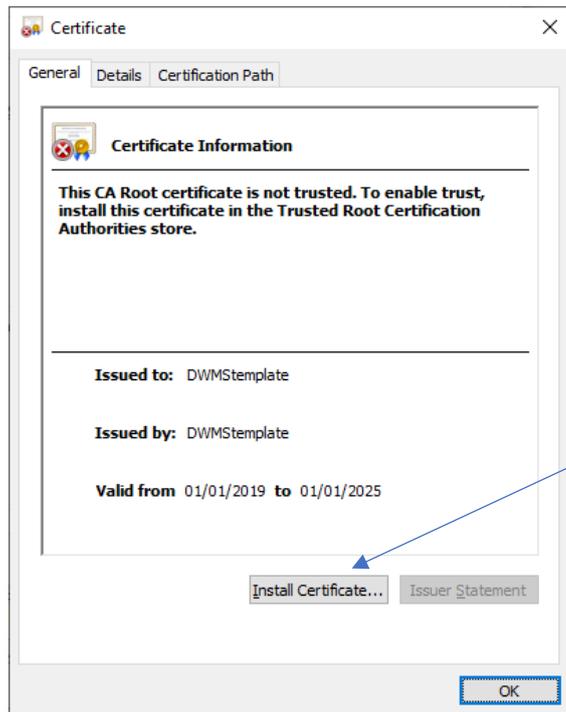
The dialog box that opens shows the certificate details that the spreadsheet model is digitally signed with.

2.2 Click on “Show Signature Details”.

A further "Digital Signature Details" dialog opens:

2.3 Click on the **View Certificate...** button:

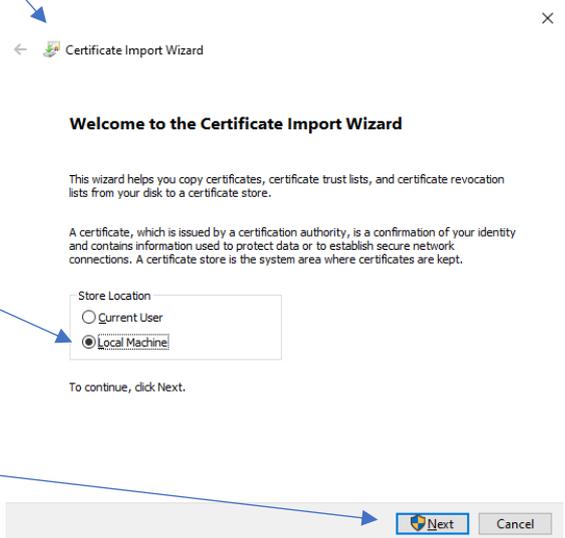
The following screen is displayed:



2.4 Now click on **Install Certificate...** button and the Certificate Import Wizard opens:

2.5 Select store location "Local Machine" from the list

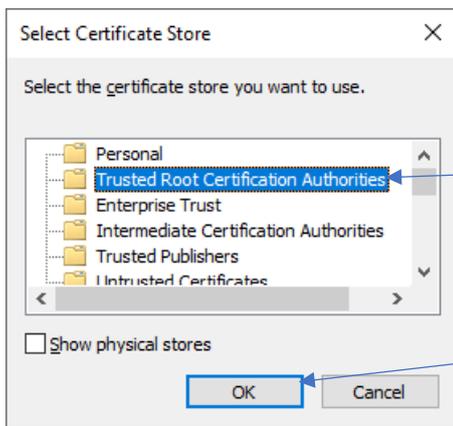
2.6 and click **Next** button:



2.7 Make sure the “Place all certificates in the following store” option is selected.

2.8 Now, choose where to save the certificate. To do this, you click on the **Browse...** button.

A dialog box opens to allow the user to specify the certificate store:



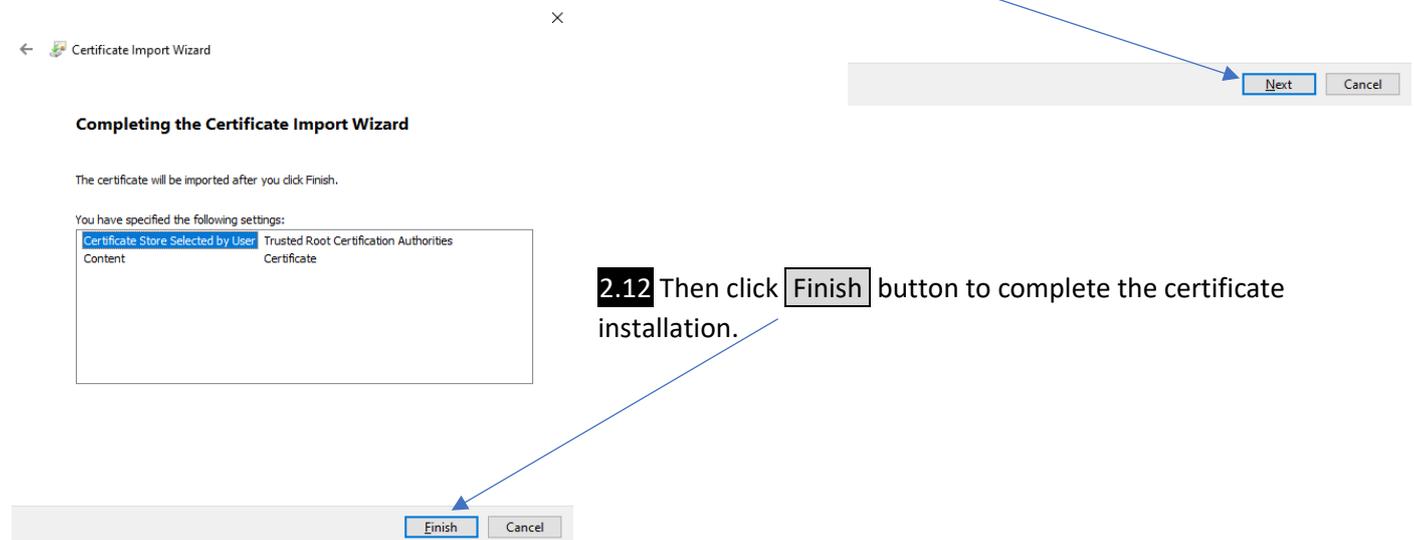
2.9 Choose “Trusted Root Certification Authorities”.

2.10 and click **OK** button:

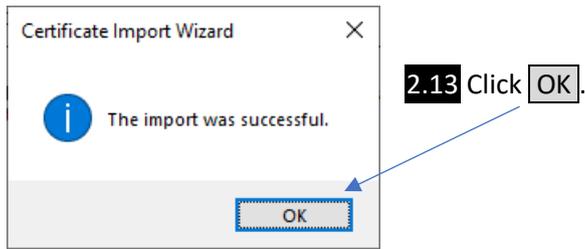
The selected store is displayed in the Import Wizard.

2.11 Having chosen the certificate store, click the **Next** button.

2.12 Then click **Finish** button to complete the certificate installation.



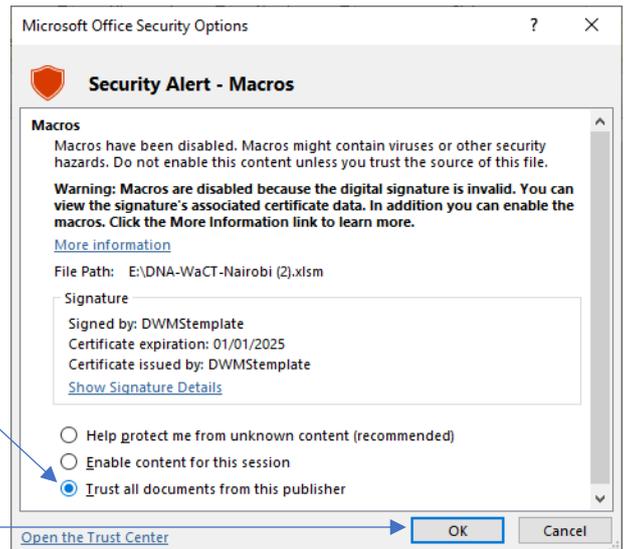
You will get a confirmation:



A final dialog box will be displayed:

2.14 Select the option “Trust all documents from this publisher”

2.15 Click **OK**.



At this point you may again see application error messages, ignore them.

2.16 Close Excel and

2.17 Reopen the Excel application and the system should be fully functional.

Other tools from David Newby Associates signed with the same DNA digital certificate should also run without further user intervention.

MACKINTOSH OS

On the Mac OS the situation is much simpler because Excel is run “sandboxed”:

Action: Enable Macros

When you open a spreadsheet tool containing macros, the Mac will pop up a dialog message saying “This workbook contains macros. Do you want to disable macros before opening the file?”

Click the **Enable Macros** button.

Note: doing this removes the DNA digital certificate - so once the workbook is saved on a Mac, the digital certificate is no longer present and the application will no longer function on a Windows PC with the Trust Centre configured as recommended above.

To subsequently open a workbook saved on a Mac in Excel on a Windows PC is necessary to enable all macros on Excel for Windows (not just digitally signed macros). This however is no longer secure and NOT recommended.

Note: Some David Newby Associates’ Excel applications are not designed to be Mac OS compatible, because Microsoft Excel for the Mac OS supports only a sub-set of VBA functionality. When a user attempts to run one of these on a Mackintosh a dialog box will display indicating this is the case, and the application will close.