

Classification Tool Users Guide

Version 2.0

An Add-In for Microsoft® Excel



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1.0 What is the Classification Tool?

The Classification Tool is an Add-In for Microsoft Excel which significantly simplifies the setting of Excel headers and footers in support of the proper NRO classification marking requirements by using a simple drop down, point and click menu interface. The tool is flexible, supporting both User Defined and Administrator defined classification markings. It also applies the appropriate classification block in the lower left part of each printed page, including the Personal Control Number (PCN). Based on the Administrators decision/policy, the tool also can force the user to put a classification heading onto a worksheet prior to allowing that worksheet to be printed out.

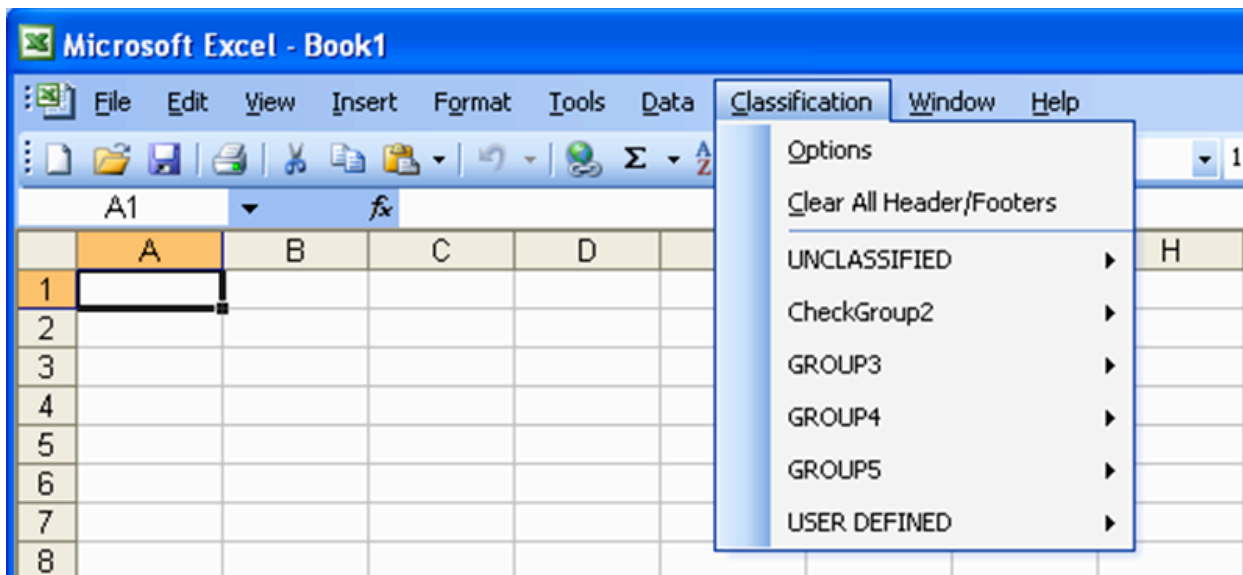


Figure 1: Classification Tool Drop Down Menu

2.0 Tool Setup by the System Administrator

In order to prepare the Classification Tool for distribution at an operational user site, the system Administrator (Admin) needs to perform several preparatory activities. These include:

- a) Tool Location Read/Write and Classified Information Policy Setup
- b) Administrator Installation
- c) Classification Tool Setup

2.1. Tool Location Read/Write and Classification Policy Setup

As noted previously, the Classification Tool is an Add-In for Microsoft Excel. As such, MS Excel needs to have access to the file when running. In network applications, MS Excel attempts to store add-ins in the user profile add-ins directory. Typically this is C:\Documents and Settings\username\Application Data\Microsoft\AddIns. However, the user will need to have write access to the add-in storage location since some of the header/footers and tool options can be changed by the user (and then must be saved). As such, Admin needs to determine if it is acceptable for users to have read/write permission to the local hard drive (this may not be permitted in some network applications). In addition, while the initial Add-In is at an unclassified level, the header/footers that will be stored in the Add-In by both Admin and by users will generally be at a classified level. This means that the Classification Tool Add-In can become classified itself. Admin needs to determine whether or not it is acceptable for classified information such as the Classification Tool Add-In to be stored onto the local hard drive.

The decisions to these two issues drive the type of installation the users (or Admin) will be required to implement when installing the Add-In.

Option A: If the user is permitted to write classified information to the local hard drive, then the instructions to the user for installation should allow Excel to save the Add-In to the directory above during installation by clicking "Yes" when asked (as shown in section 3.f).

Option B: In the event that user write access to the local hard drive or storage of classified information on the local hard drive is not allowed, instructions for the user for installation should require the user to locate the tool in their home user directory and prevent Excel from saving the Add-In in the directory above during installation by clicking "No" when asked (as shown in section 3.f).

2.2. Administrator Installation

In order to install the Add-In tool to perform set up prior to distribution to the users, the administrator should:

- a) copy the "Classification Tool v2.xla" file to a permitted directory/location on the user machine or network
- b) open MS Excel for Windows
- c) via the Excel menus, select the Tools/Add-Ins menu

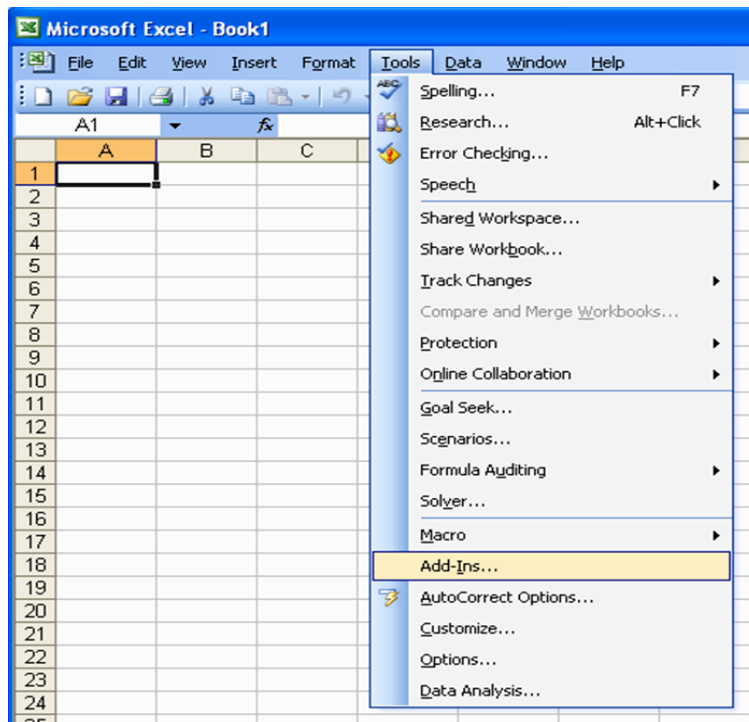


Figure 2: Add-Ins Command Button

d) next, click the "Browse" button

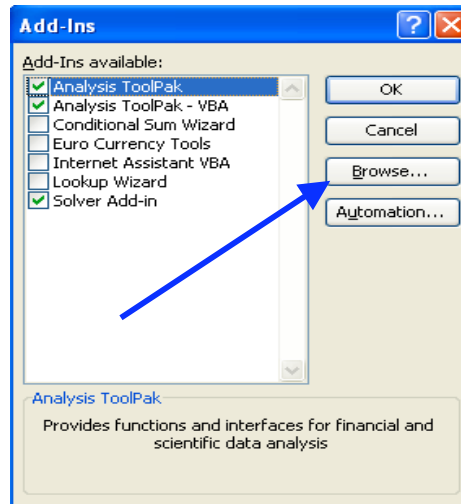


Figure 3: Select Add-In Browse Button

- e) navigate to the location of the "Classification Tool v2.xla" file defined in (a) above, select it and click OK
- f) Excel will now load the add-in. If you are on a network, Excel may ask if you wish to copy the Add-In to the Add-ins directory. If it is permitted to save classified information on the local machine hard drive based profile, select "Yes". If not permitted to save data to your local machine profile. Click "No".
- g) That's it! The Classification Tool is now installed as a Microsoft Excel Add-In.

2.3. Classification Tool Setup

Once installed, it is now time to set up the Classification Tool for your specific application. To do this, select the Classification menu from the Excel menu bar. Select the "Options" button on this menu. This will open the Options window which displays 4 tabs.

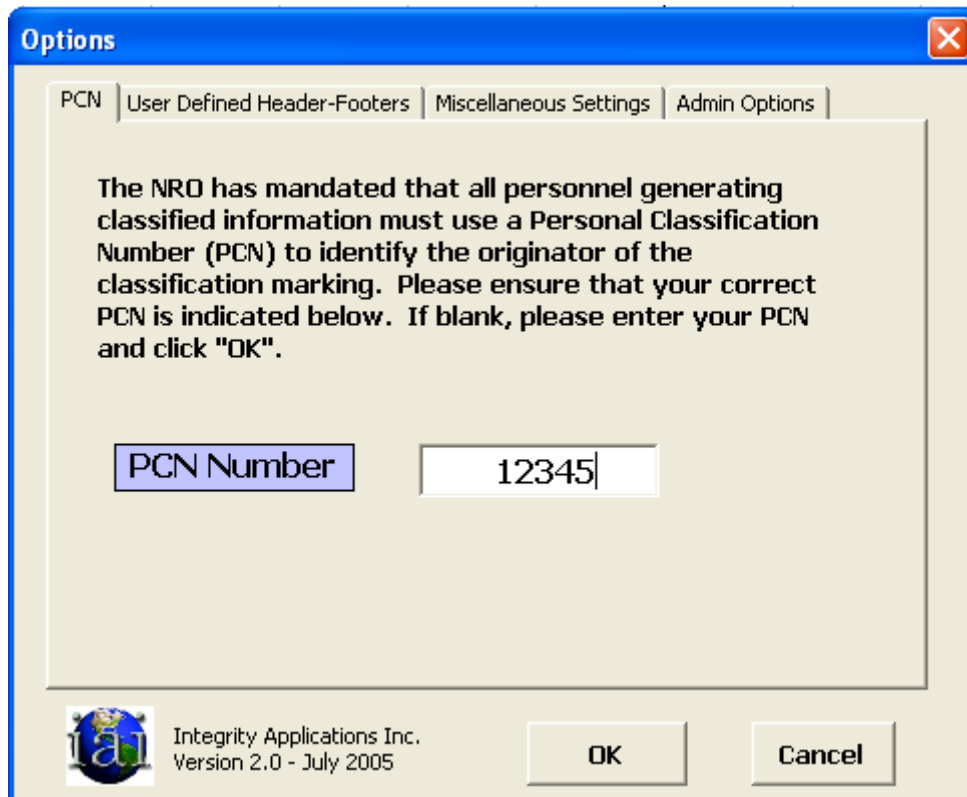


Figure 4: Options Menu

Select the Admin Options tab which will open the window shown below.

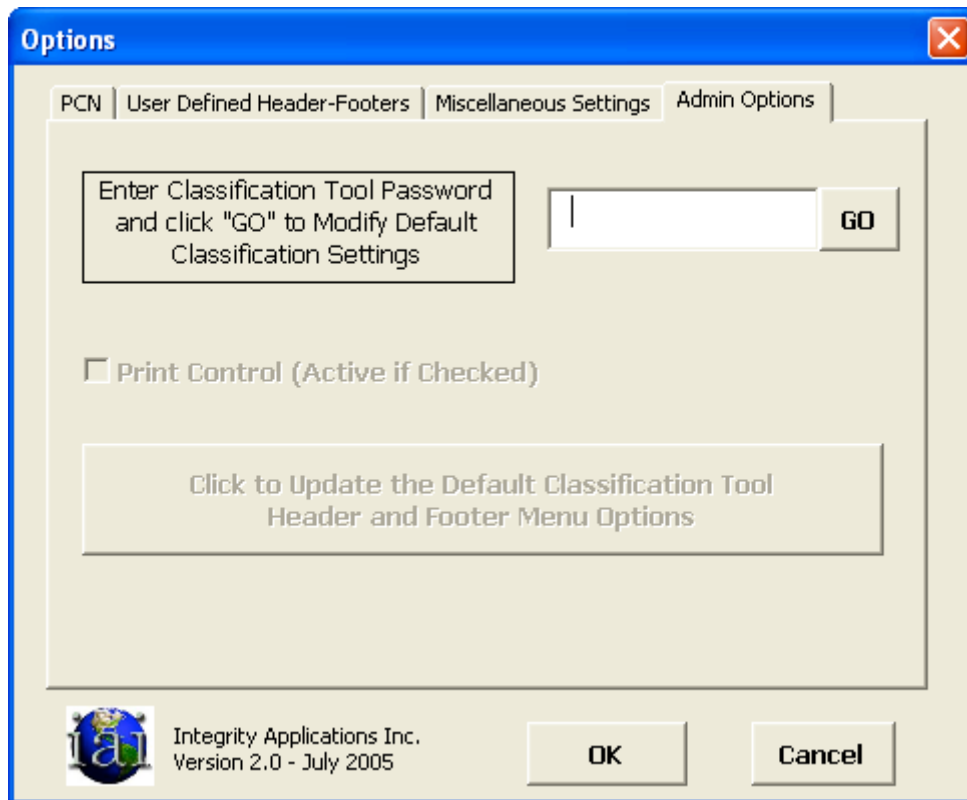


Figure 5: Admin Options Tab

In order to access the Admin options, the Admin password must be entered (password is provided with the software). Once this password has been entered, click on the GO button. This will activate the Admin option buttons and allow them to be modified. An incorrect password will result in the options remaining disabled (grayed out).

The first admin option is the Print Control checkbox. When the Print Control checkbox is checked, the user will be forced to apply a header and footer to each page before it is allowed to be printed. If the user attempts to print a page without a header and footer, the Classification Tool Add-In will warn the user and prompt them to apply a classification header and footer. For the case displayed above, one can see that the Print Control button is NOT checked and therefore, the user would be able to print without being required to include headers and footers on each page.

The second admin option is a command button to set up the default classification header/footers and "classified by" information. Click on the **"Click to Update the Default ..."** button to open the Classification Tool setup sheet interface shown below.

	A	B	C	D	E	
1	PCN Number	12345	Classification Groups	7	PCN Number is the user's saved Personal Classification Number - modified by the program interactively	"Classification Group user classification favorites and the user defined by ADMIN"
2	number of favorites to display	3	max levels per group	20	number of favorites to display - the number of user selected "last used" header/footers to display in the menu - modified by the program interactively	"max levels per group number of classification defined groups - this Defined labels - defined"
3	menuflag	FALSE	print control flag	FALSE	menuflag "FALSE" means headers/footers are applied to all sheets and charts in the workbook; "TRUE" means just those on the active sheet - modified by the program interactively	print control flag = user can print at any time that the center header blank entries in order ADMIN
4	page and date	TRUE		Once Changes Have Been Made, Click on This Button to Reset the Classification Tool to It's Normal Setting		page and date "FALSE" means page and date are not included in the upper right corner header; "TRUE" means they are - modified by the program interactively
5	Begin Header This Line		UNCLASSIFIED	5		
6				UNCLASSIFIED		
7				UNCLASSIFIED // FOUO		
8				UNCLASSIFIED // PROPIN		
9				UNCLASSIFIED // SOURCE SELECTION SENSITIVE		
10				UNCLASSIFIED // PROPIN // SOURCE SELECTION SENSITIVE		
11			CheckGroup2	3		
12				Label1	null	
13				Label2	null	
14				Label3	null	
15			GROUP3	3		
16				Label1	null	
17				Label2	null	
18				Label3	null	
19			GROUP4	2		
20				Label1	null	
21				Label2	null	
22			GROUP5	3		
23				Label1	null	
24				Label2	null	
25				Label3	null	

Figure 6: Classification Tool Setup Interface Worksheet

The Classification tool setup sheet interface is simply an excel spreadsheet that the Add-In uses to store information. This worksheet is always hidden when the Add-In is nominally configured. In order to set up the Add-In appropriately, Admin will need to make some changes to this sheet to configure it for the users needs. The details for each of the cells are defined below. Only some require Admin configuration, many are actually configured during program operation in conjunction with the user.

2.3.1. Control Parameters

Cell B1: this cell is the location where the Classification Tool Add-In saves the users PCN number. It is set interactively when the user first runs the add-in and attempts to load a classified header/footer. Admin does not need to modify A1:B1.

Cell B2: this cell is the location where the Classification Tool Add-In saves the user selected number of "Last Used" header/footers to display. This number of last used header/footers are displayed at the bottom of the Classification drop down menu. This value is set interactively by the user with the default being 3. Admin does not need to modify A2:B2.

Cell B3: this cell is the location where the Classification Tool Add-In saves a flag used by the Add-In to determine if the user selected header/footers should be applied to the active worksheet or to all worksheets in the workbook. When set to FALSE, the flag indicates that header/footers are to apply to all Worksheets and Charts in the active workbook. This value is set interactively by the user with the default being FALSE. Admin does not need to modify A3:B3.

Cell B4: this cell is the location where the Classification Tool Add-In saves a flag used by the Add-In to determine if the page number and date should be included in the header. When set to FALSE, the flag indicates that page and date are NOT included in the headers. This value is set interactively by the user with the default being FALSE. Admin does not need to modify A4:B4.

Cell D1: this cell is the location where the number of classification groups which will be displayed in the Classification menu is stored. A classification group is group of related classification markings (for example, in Figure 1 shown earlier, 5 Admin Defined classification groups are displayed, namely UNCLASSIFIED, Check Group2, GROUP3, GROUP4 and GROUP5. Another group, namely USER DEFINED is also displayed). This field (Cell D1) must contain the total number of classification groups which will be displayed on the menu, including the User Defined group and the Last Used group. For example, suppose the requirement is to have 3 default groups of classification, namely Unclassified, Check Group 2 and GROUP3. In this event, the value for this field would be set to 5; 3 for the Admin defined classification groups plus 2 for the user defined groups (User Defined and Last Used). This field must be set by Admin when defining the various classification groups and their individual entries (see below. Cell C5).

Cell D2: this cell is the location where the maximum number of entries in each classification group is stored. For example, in the UNCLASSIFIED group, up to 20 different entries could exist if this field was set to 20. The same maximum value applies to all groups. The minimum allowable entry for this field is 8. The recommended maximum for this field is 20. This field must be set by Admin when defining the various classification groups and their individual entries (see below. Cell C5).

Cell D3: this cell is the location where the Print Control Flag is stored. The Print Control flag allows Admin to force the user to include a header and footer on each page before allowing a page to be printed. This is generally a requirement in classified areas. This field is set by admin by checking the Print Control checkbox on the Admin options as described earlier.

Cell D4: Once all configuration changes have been made, Admin should click on Cell D4 which is actually a command button. This will reset the Add-In to the normal operational state and save all the changes made by Admin. At this point, the "Classification Tool v2.xla" file is ready for distribution to the general user population.

2.3.2. Admin Defined Classification Label Entries

Cell C5-D5: These cells mark the beginning of the section Admin uses to set the default classification groups and header/footer labels that Users will be able to use. Cell C5 contains the name of the first classification group and cell D5 contains the number of entries in that first group.

Cell D6-E6: These cells contain the first entry for the group name identified in C5-D5. Each entry in the group is then listed on subsequent rows in Column D and E. Note that for each entry, there are two fields required: column D contains the entry header/footer text that will be included in the center of each header and footer when that item is selected by the user; column E contains the text that provides the reference for the classification marking block that is printed in the lower left corner of each page.

It is very important the column E be filled out properly! The Classification Tool Add-In looks at the column E entries to determine if a classification block must be included on one of the excel pages to be printed. In the event that column E is empty, the Classification Tool Add-In assumes that no classification block is required. If an entry exists in column E, a classification block will be included. In the example graphic, because those entries for the Unclassified group are all blank (E6 through E10), no classification block will be printed when these entries are selected.

When Admin wants to enter another classification group, the name needs to be placed in Column C with the number of entries located in column D as described above for cell C5-D5. Group entries are then included as described above for cells D6-E6 although the row numbering will obviously be different.

IMPORTANT: The Classification Tool Add-In requires that no blank lines should exist between classification groups up through the end of the Admin defined default classification groups.

2.3.3. User Defined Classification Label Entries

The two additional classification groups, namely the Last Used group and the User Defined group, are generated by the program and as such, do not require any Admin changes. Admin can blank the entries and classification blocks in each group (columns D and E) but must ensure that the Group name fields (column C) are left intact. In addition, the Last Used group requires that space for at least 8 entries (rows) be kept prior to the User Defined group. The User Defined group is controlled by each individual user via the interface described in Section 4.1.2.

	A	B	C	D
26				
27	max of 8		LAST USED	0
	must keep space for 8 rows!			
28		1		
29		2		
30		3		
31		4		
32		5		
33		6		
34		7		
35		8		
36			USER DEFINED	0
37				

Figure 7: User Defined Classification Groups

2.3.4. Saving Admin Changes

Once all modifications have been made, click on the button in cell D4. This will close the interface and return to the nominal excel screen. Admin can then select the Classification drop down menu to see the results of the changes on the available header/footer options.

3.0 User Installation

To install the classification tool, apply the following procedure:

- a) copy the "Classification Tool v2.xla" file to a permitted directory/location on the user machine or network
- b) open MS Excel for Windows
- c) via the Excel menus, select the Tools/Add-Ins menu

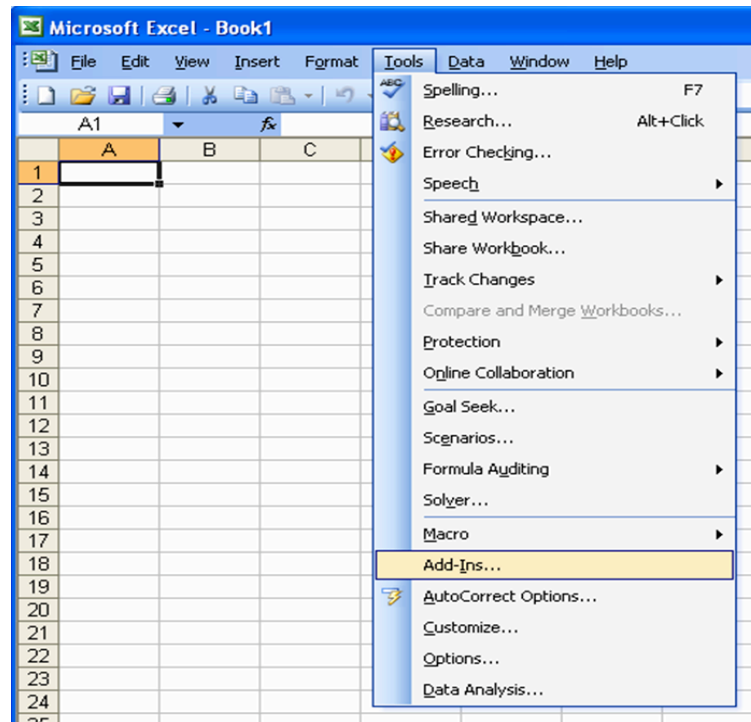


Figure 8: Add-Ins Command Button

d) click the "Browse" button

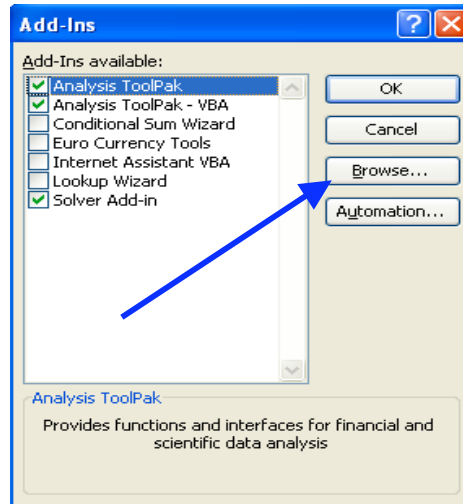


Figure 9: Select Add-In Browse Button

- e) navigate to the location of the "Classification Tool v2.xla" file location defined in (a) above, select it and click OK
- f) Excel will now load the add-in. If you are on a network, Excel may ask if you wish to copy the Add-In to the Add-ins directory. If your Administrator has permitted you to save classified information on the local machine hard drive based profile, select "Yes". If you are not permitted to save data to your local machine profile. Click "No".
- g) That's it! The Classification Tool is now installed as a Microsoft Excel Add-In.

4.0 Using the Classification Tool

Once installed, the Classification Tool is now ready for use. All access to the tool is via the Classification menu bar as depicted in Figure 1.

4.1. Options

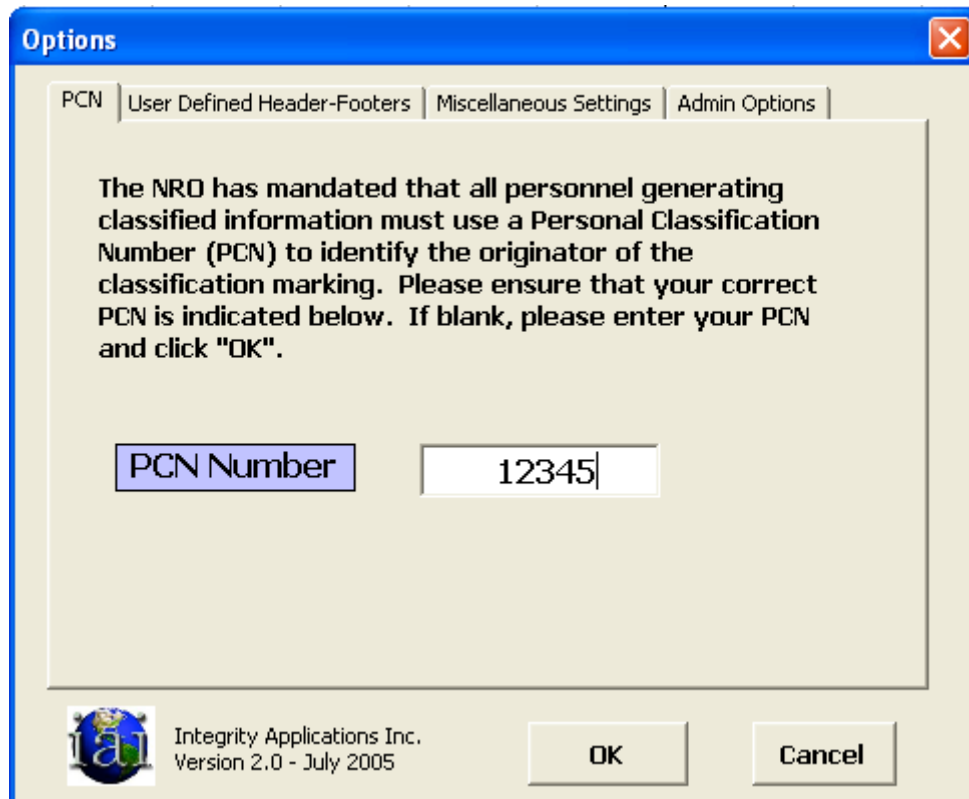


Figure 10: Options Menu

Selecting the Options button from the Classification drop down menu will give the user access to three different tabs, namely the PCN tab, the User Defined Header-Footer tab and the Miscellaneous settings tab. These are described below. The user cannot change anything on the Admin Options tab.

4.1.1. PCN Tab

The PCN tab is depicted above in Figure 10. The NRO requires that all users who classify information must identify themselves in the classification block via the use of a Personal Classification Number or PCN. The Classification Tool will require the user to enter their PCN before permitting header-footers of a classified nature to be applied to the workbook. To enter the PCN, simply type in the appropriate number into the text box and click OK. This will save the PCN so that future uses of the tool will not require reentering the number.

4.1.2. User Defined Header-Footers Tab

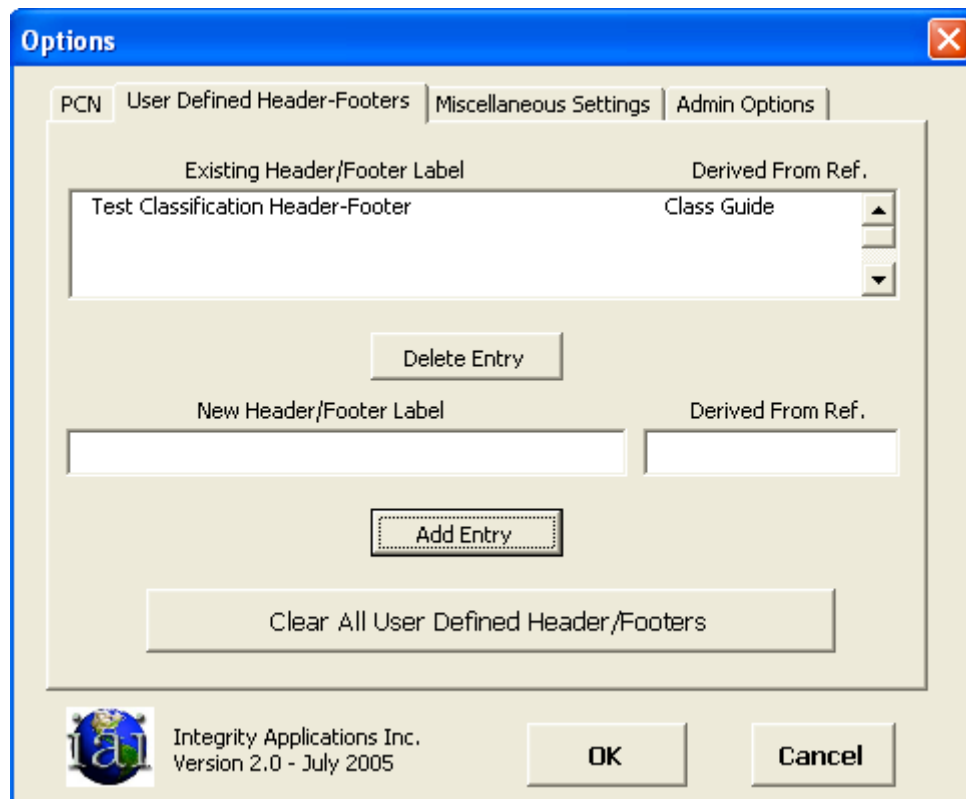


Figure 11: User Defined Header-Footer Tab

The User Defined Header-Footer tab is displayed above. This tab is used by the user to set personalized header-footers. To enter a new header-footer, simply enter the text string for the header-footer to be located in the middle of the top and bottom of each page into the box labeled "New Header/Footer Label". Next, type the appropriate

classification “derived from” reference, typically the appropriate classification guide, into the text box labeled “Derived From Ref.” Finally, click the Add Entry button. This will move the new header-footer and derived from reference up into the list box at the top of the tab.

IMPORTANT: Note that the “Derived From Ref.” entry is **REQUIRED** for any classified header-footer that the user adds. Failure to properly enter the derived from reference will cause the Classification Tool to fail to load the classification block in the lower left corner of printouts. For Unclassified header-footers, no derived from reference should be entered.

Multiple user defined header footers can be entered but the total number of user defined header-footers should not exceed 20. When finished, click on OK (or another tab). The information will be saved in the add-in and the new header-footer will be added to the User Defined group on the Classification drop down menu.

To remove user defined header-footers, simply select the appropriate one from the list in the top box and click the Delete Entry button. This will remove the entry from the list and from the drop down menu.

4.1.3. Miscellaneous Settings Tab

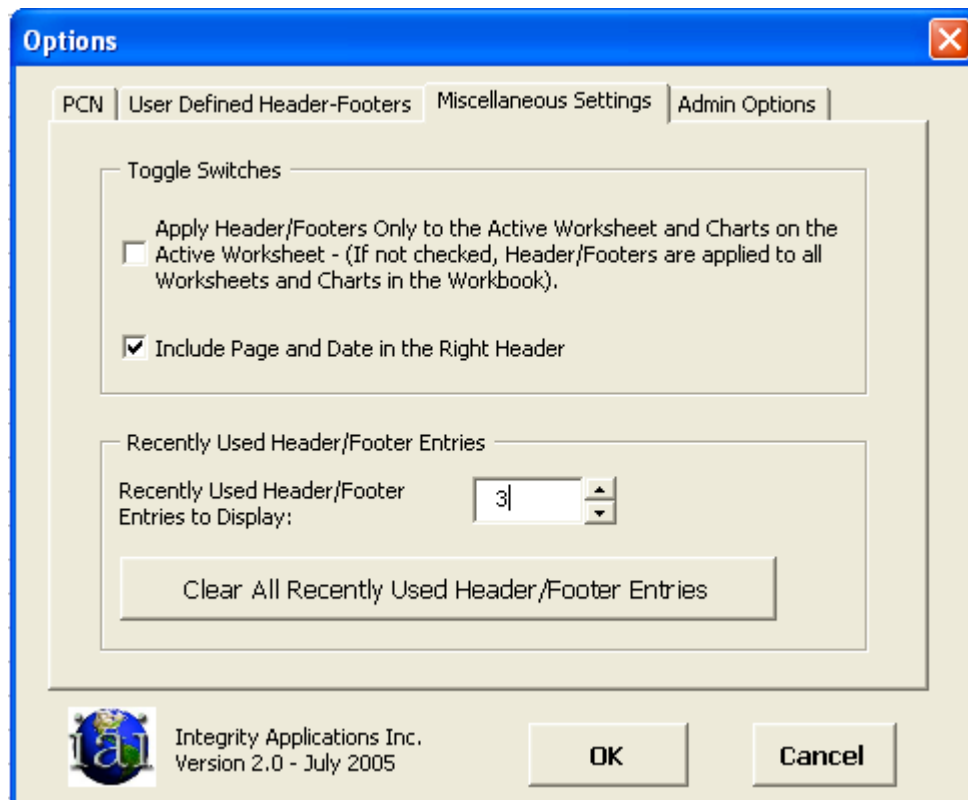


Figure 12: Miscellaneous Settings Tab

The Miscellaneous Settings tab is displayed above. This tab is used by the user to set some default Classification Tool behavior. There are 3 items that can be set to match the user preferences.

The first check box determines if the user would like the selected classification headers and footers to be applied to every sheet and chart in the workbook or just to the active worksheet when the classification label is selected. Checking the box tells the Classification Tool to apply the selected header and footer to the active worksheet only. An unchecked box tells the Classification Tool to apply the selected header and footer to all worksheets in the workbook.

The second check box tells the Classification tool if it should include the page number and date in the upper right part of the header. If the box is checked, the page and date are included; if it is unchecked, no page or date is included.

The final setting is the number of recently used Header/Footer entries to display. The Classification Tool can keep track of the recent header-footer entries that were applied

to worksheets. This setting allows the user to determine how many of those to display in the drop down menu (they will appear below the User Defined classification group). The maximum for this setting is 8 and the minimum is 3. Changes are made by clicking on the up and down arrows immediately to the right of the value. To delete the entire list of recently used header-footers, the user can click on the “Clear All Recently User Header/Footer Entries” button.

4.2. Clear All Header/Footers

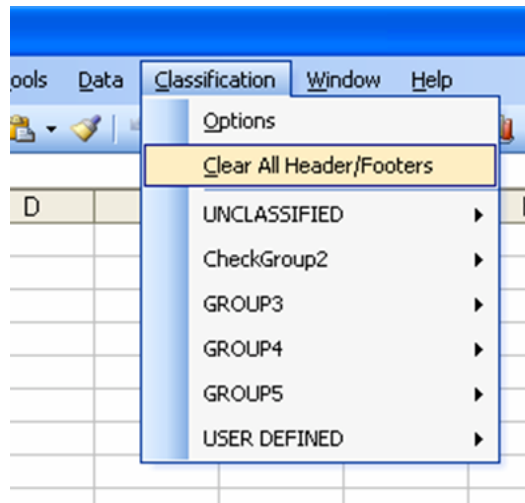


Figure 13: Clear All Header/Footers

The Clear All Header/Footers button, selected from the Classification drop down menu, simply provides the user with an easy way to clear all the headers and footers on the current worksheet or in the current workbook, depending on the setting described in the Miscellaneous Settings, Section 4.1.3.

4.3. Default Classification Labels

The default classification groups which have been set up by the system Administrator, are available from the Classification drop down menu. Selecting a classification is as simple as selecting a group and then, within that group, selecting a specific header/footer as shown in Figure 14 below. This label will then be applied to the worksheet or workbook according to the miscellaneous setting described above.

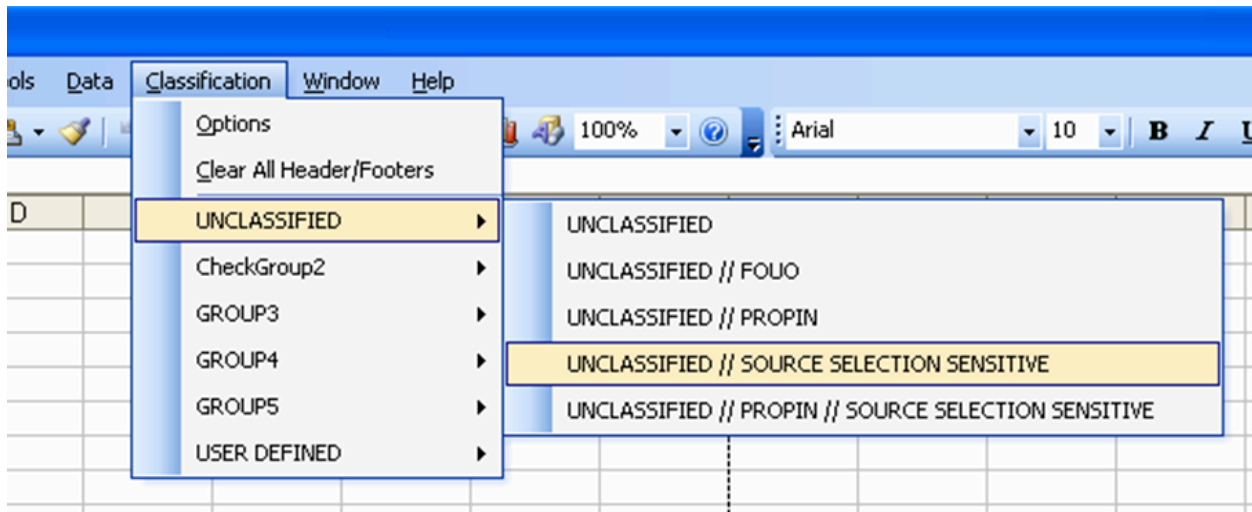


Figure 14: Selecting a Default Classification Header/Footer

4.4. Last Used Classification Labels

As noted earlier, the Classification Tool keeps track of recently used header-footers and makes them more easily available in the drop down menu. In Figure 15 below, one can see that immediately after selecting the Unclassified/Source Selection Sensitive header-footer shown in Section 4.3, that header-footer now appears in the drop down menu list. Last used entries can be selected directly from the Classification drop down menu without having to go through the default classification group menu.

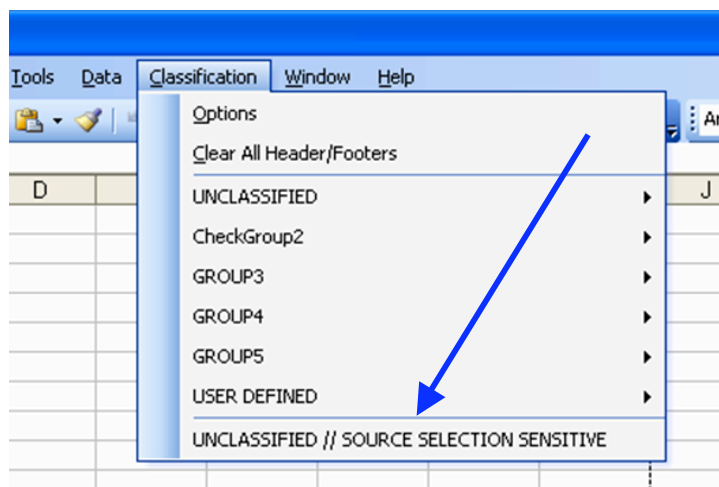


Figure 15: Last Used Header-Footer Entries

5.0 Tech Support/Pricing Data

The Classification Tool Add-In for MS Excel, version 2, software is delivered in a "use as is" state. Users requiring technical support can obtain it by contacting the author at the address below. The cost of that technical support will depend on the type user support required along with the expected duration of support. Support fees and pricing information are described in Section 5.2 below.

Be sure to have the following items available:

- 1) computer operating system (NT, XP, etc.) and
- 2) the version of Excel and PowerPoint being used
- 3) if possible, a description of the problem along with the excel file being used when the problem occurred

The Classification Tool, v2, was written for Microsoft Excel MSOffice 2002 and developed using the Windows XP environment. Contact IAI tech support for problems/bugs related to different versions of Excel or the operating system.

5.1. Tech Support Contact Information:

: Integrity Applications Incorporated
Easy Classifier Tech Support
Address: 5180 Parkstone Drive
Suite 260
Chantilly, VA 20151
email: easyclassifier@integrity-apps.com
Telephone: 703-378-8672 and follow the prompts

5.2. Classification Tool Support and Purchasing Fee Schedules

Technical Support contracts are customer specific. An example of a possible contract set up would be:

Support Type	Rate
Support for General Setup, Usage Issues, and Minor Bug Fixes (maximum of 50 calls @15 min. per call)	\$5000 base fee plus: \$15 per copy: 1 – 20 Copies \$12 per copy: 21 – 50 Copies \$10 per copy: 51 – 100 Copies \$7 per copy: 101 – 1000 Copies \$5 per copy: 1001+ Copies

Figure 16: Example Technical Support Contract

Purchase Schedule	
Number of Copies	Purchase Rate
1 - 20	\$50 per copy
21 - 50	\$40 per copy
51-100	\$35 per copy
101 - 1000	\$30 per copy
1001+	\$25 per copy

Figure 17: Classification Tool Purchase Schedule

6.0 End Use License Agreement (EULA)

IMPORTANT - READ CAREFULLY:

This End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single legal entity) and Integrity Applications Incorporated (IAI) of the Classification Tool, v2, dated 31 July, 2005 software (the "SOFTWARE"). The SOFTWARE includes computer software, and printed materials. The terms of this printed paper EULA, which may accompany the SOFTWARE, supersede the terms of any on-screen EULA. By installing, copying, downloading, accessing or otherwise using the SOFTWARE, you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA, you may not use, copy or distribute the SOFTWARE, and you should promptly contact IAI for instructions on return of the unused product(s) for a refund in accordance with IAI's return policies.

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