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**Enabling Macros in Excel**

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**Author:** Pesticide Reporting Service Bureau

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Background

We have provided several custom operations in the [Option B Excel eForms](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) for your convenience. These functions all require that macros be enabled. Before you can enable macros, you must set the appropriate macro security level.

[Macros](http://sbdocs.psur.cornell.edu/display/PSBD/Glossary#Glossary-Macro) can add a wide variety of custom behavior to Microsoft Excel workbooks, but they also pose a potential security risk. Consequently, each version of Excel has provided ways for users to enable or disable macros by setting the desired level of macro security from **Very High** to **Low**; the initial “default” setting provides a relatively high level of protection.

The process for enabling macros depends upon the version of Excel and whether the workbook has been [digitally signed](#scroll-bookmark-2).

Excel 2000 - 2003

To change the macro security level

Excel 2000 through Excel 2003 have four [macro security levels](#scroll-bookmark-5).

1. Start Excel.
2. On the **Tools** menu, point to **Macro** and click **Security**.
3. In the **Security** dialog box, click the **Security Level** tab.
4. Select the desired [macro security setting](#scroll-bookmark-5) and then click **OK**. (Use either **Medium** or **High** for [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide).)
5. Close Excel. (The security-level changes will not take effect until Excel is restarted).

To enable macros in the Option B workbooks

With macro security set to either **High** or **Medium**:

1. Start the [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) program (first usage, see this [note](http://sbdocs.psur.cornell.edu/display/PSBD/Notes#Notes-8)).
2. Choose the type of form and open a **Blank Form** or reopen a previously saved **Existing Form**.
3. When Excel 2000 - 2003 starts, you will be presented with a **Security Warning** dialog box. It should indicate that the workbook contains macros by *Cornell University*.

* If macro security is set to **High**, you may only enable macros from trusted publishers. The **Enable Macros** button is disabled until you check “**Always trust macros from this publisher**”. Check the box, then select **Enable Macros**.
* If macro security is set to **Medium**, you have two choices:
* Recommended: Check “**Always trust macros from this publisher**”, then select **Enable Macros**.
* Leave “**Always trust macros from this publisher**” unchecked and select **Enable Macros**. This approach enables macros only for this workbook and only for this session. You will need to enable macros every time you open an [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbook.

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| If you check “**Always trust macros from this publisher**”,you only need to do this once; from then on, all [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) forms should open with macros enabled. |

Excel 2007

To change the macro security level

Beginning with Excel 2007, there are still [four security levels](#scroll-bookmark-5) but their meanings are subtly different from those in Excel 2003 and earlier.

1. Start Excel.
2. Click the **Office Button** (the Windows™ logo in the upper left corner).
3. Select the **Excel Options** button.
4. In the left pane of the Excel **Options** dialog, select **Trust Center**.
5. Click the **Trust Center Settings** button in the right pane.
6. In the left pane of the **Trust Center** dialog, select **Macro Settings**.
7. In the right pane, select the desired [macro security setting](#scroll-bookmark-5). (Use either of the middle two settings; it does not matter for [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide).)
8. Click **OK** to close the **Trust Center**; click **OK** to close Excel **Options**.

To enable macros in the Option B workbooks

1. Start the [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) program (first usage, see this [note](#scroll-bookmark-10)).
2. Choose the type of form and open a **Blank Form** or reopen a previously saved **Existing Form**.
3. If you have not previously selected “**Trust all documents from this publisher**” with an [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) file, the workbook will open with macros disabled and a **Security Warning** bar between the **Ribbon** and the spreadsheet.

* Click the **Options…** button on the **Security Warning** bar.

1. The Microsoft Office **Security Options** dialog appears showing information about the [digital signature](#scroll-bookmark-2) for this form. The [digital signature](#scroll-bookmark-2) should be valid, but may have expired; the macros should be signed by Cornell University. You have two options:

* Recommended: Select “**Trust all documents from this publisher**”. (Not available if the [signature](#scroll-bookmark-2) has expired.) From now on, all [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbooks should open with macros enabled.
* Select “**Enable this content**”. You will need to enable macros the same way every time you open an [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbook.

1. Select **OK** to close the Security Options dialog.

Excel 2010 - 2013

To change the macro security level

Beginning with Excel 2007, there are still [four security levels](#scroll-bookmark-5) but their meanings are subtly different from those in Excel 2003 and earlier.

1. Start Excel.
2. Open the **File** menu[9](http://sbdocs.psur.cornell.edu/display/PSBD/Notes#Notes-9).
3. Select the **Options** button.
4. In the left pane of the Excel **Options** dialog, select **Trust Center**.
5. Click the **Trust Center Settings** button in the right pane.
6. In the left pane of the **Trust Center** dialog, select **Macro Settings**.
7. In the right pane, select the desired [macro security setting](#scroll-bookmark-5). (Use either of the middle two settings; it does not matter for [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide).)
8. Click **OK** to close the **Trust Center**; click **OK** to close Excel **Options**.

To enable macros in the Option B workbooks

1. Start the [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) program (first usage, see this [note](#scroll-bookmark-10)).
2. Choose the type of form and open a **Blank Form** or reopen a previously saved **Existing Form**.
3. If you have not previously selected “**Trust all documents from this publisher**” with an [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) file, the workbook will open with macros disabled and a **Security Warning** bar between the Ribbon and the spreadsheet.
4. **Do Not** select the **Enable Content** button in the **Security Warning** bar; that will enable macros only for this document. Instead, click the “**Macros have been disabled**” text to the left of the button (or open **Info** from the **File** menu).
5. In the **Security Warning** section of the **Info** screen, click the **Enable Content** drop-down button and choose **Advanced Options**.
6. The Microsoft Office **Security Options** dialog appears showing information about the [digital signature](#scroll-bookmark-2) for this form. The [digital signature](#scroll-bookmark-2) should be valid, but may have expired; the macros should be signed by Cornell University. You have two options:

* Recommended: Select “**Trust all documents from this publisher**”. (Not available if the [signature](#scroll-bookmark-2) has expired.) From now on, all [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbooks should open with macros enabled.
* Select “**Enable content** **for this session**”. You will need to enable macros the same way every time you open an [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbook.

1. Select **OK** to close the **Security Options** dialog.

Macros Disabled Warning

As the workbook is being saved, the “Macros Disabled” warning will briefly appear. This is normal and intended. [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbooks are saved with the the red “**Macros are disabled**” warning message *visible* in order to ensure that it is visible if you re-open the workbook with [macros](http://sbdocs.psur.cornell.edu/display/PSBD/Glossary#Glossary-Macro) disabled.

When an [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) workbook is opened, a [macro](http://sbdocs.psur.cornell.edu/display/PSBD/Glossary#Glossary-Macro) runs that reads some identity information from the [Control Center](http://sbdocs.psur.cornell.edu/display/PSBD/Glossary#Glossary-ControlCenter) and hides the red “**Macros are disabled**” warning in the header area of the spreadsheet.

Macro Security Levels

The macro security levels in Excel changed starting with Excel 2007.

Excel 2000 - 2003

### Very High

Only macros installed in trusted locations will be allowed to run. All other signed and unsigned macros are disabled. Not available in Excel 2000. Not recommended for use with Option B. (Option B features will only be available with significant setup effort.)

### High

Default setting; only signed macros from trusted sources will be allowed to run. Unsigned macros are automatically disabled. Recommended for Option B, unless you need a lower setting for other reasons.

### Medium

You can choose whether or not to enable macros in a particular workbook; digital signatures are not required. Acceptable for Option B.

### Low

Enable all macros. Not recommended, potentially dangerous code can run.

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| We previously recommended that you change the macro security level to **Medium**. At that time we were not signing the macros, so **Medium** security was the best setting compatible with [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide). |

Excel 2007 - 2013

### Disable all macros without notification

Not recommended (Some [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) features will not be available.)

### Disable all macros with notification

Acceptable (default setting for [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide))

### Disable all macros except digitally signed macros

Recommended for [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide).

### Enable all macros

Not recommended (potentially dangerous code can run)

Signed Macros and Excel

Macros in an Excel workbook can be digitally “signed”. This process identifies the publisher of the macros and assures you that the code has not been altered since publication. All current versions of our [Option B workbooks](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) include a digital signature from Cornell University.

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| If the digital signature has expired, you are probably using an old version of the [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) application. With an expired digital signature, you cannot choose to **Trust** the publisher. You will have to set the **Medium** security setting, which is a less secure setting, for [Option B](http://sbdocs.psur.cornell.edu/display/OB61/Option+B+User+Guide) to function correctly.  We recommend that you [update to the current version](http://www.nysprl.com/ClientSoftware.htm). |