

Enabling Macros in Excel

Background

We have provided several custom operations in the [Option B Excel eForms](#) 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](#) 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](#).

Excel 2000 through Excel 2003 have four [macro security levels](#).

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](#) and then click **OK**. (Use either **Medium** or **High** for [Option B](#).)
5. Close Excel. (The security-level changes will not take effect until Excel is restarted).

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

1. Start the [Option B](#) program (first usage, see this [note](#)).
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](#) workbook.



If you check “**Always trust macros from this publisher**”, you only need to do this once; from then on, all [Option B](#) forms should open with macros enabled.

Beginning with Excel 2007, there are still [four security levels](#) 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](#). (Use either of the middle two settings; it does not matter for [Option B](#).)
8. Click **OK** to close the **Trust Center**; click **OK** to close Excel **Options**.

1. Start the [Option B](#) program (first usage, see this [note](#)).
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](#) 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.
4. The Microsoft Office **Security Options** dialog appears showing information about the [digital signature](#) for this form. The [digital signature](#) 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](#) has expired.) From now on, all [Option B](#) 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](#) workbook.

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

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

1. Start Excel.
2. Open the **File** menu⁹.
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](#). (Use either of the middle two settings; it does not matter for [Option B](#).)
8. Click **OK** to close the **Trust Center**; click **OK** to close Excel **Options**.

1. Start the [Option B](#) program (first usage, see this [note](#)).
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](#) file, the workbook will open with macros disabled and a **Security Warning** bar between the Ribbon and the spreadsheet.
 - a. **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"** or **"Some active content has been disabled. Click for more details."** text to the left of the button (or open **Info** from the **File** menu).
 - b. In the **Security Warning** section of the **Info** screen, click the **Enable Content** drop-down button and choose **Advanced Options**.
4. The Microsoft Office **Security Options** dialog appears showing information about the [digital signature](#) for this form. The [digital signature](#) 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](#) has expired.) From now on, all [Option B](#) 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](#) workbook.
5. Select **OK** to close the **Security Options** dialog.