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** menu[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. (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.