informxl

Excel Setup Document

Date: May 18, 2021

Applicable to: informXL Analyzer v 4.0 and higher

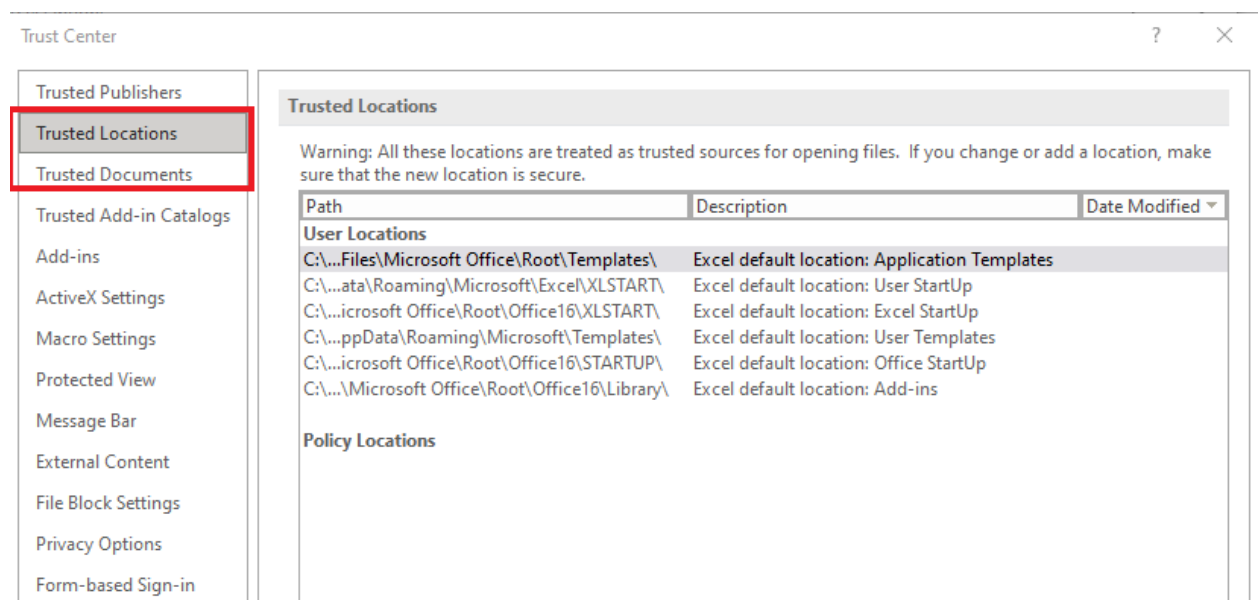## Microsoft Excel Security Setup

Users running informXL Analyzer will need to configure Microsoft Excel's security settings to allow the execution of Macros and External Data Content. Enableing Excel Macros and External Data Connections can be accomplished thorough various methods in Office, two methods which are mentioned below. informXL Inc. suggests you follow your company's IT security policy when configuring these settings.

Method A – Configure "Trusted Documents" and / or "Trusted Locations" *(recommended)*

Trusted Documents and Trusted Locations allow Excel files that have active content (Macros, ActiveX Controls, Data Connections, etc.) to open without the Message Bar prompting for approval. After a document or location is trusted it does not open in Protected View. Therefore, you should trust documents only if you trust the source of the file.

Enabling and configuring Trusted Documents and Trusted Locations can be done direcly in Excel through the Excel Trust Center. Details on how to configure these settings can be found on Microsoft's Office support site or through the following links:
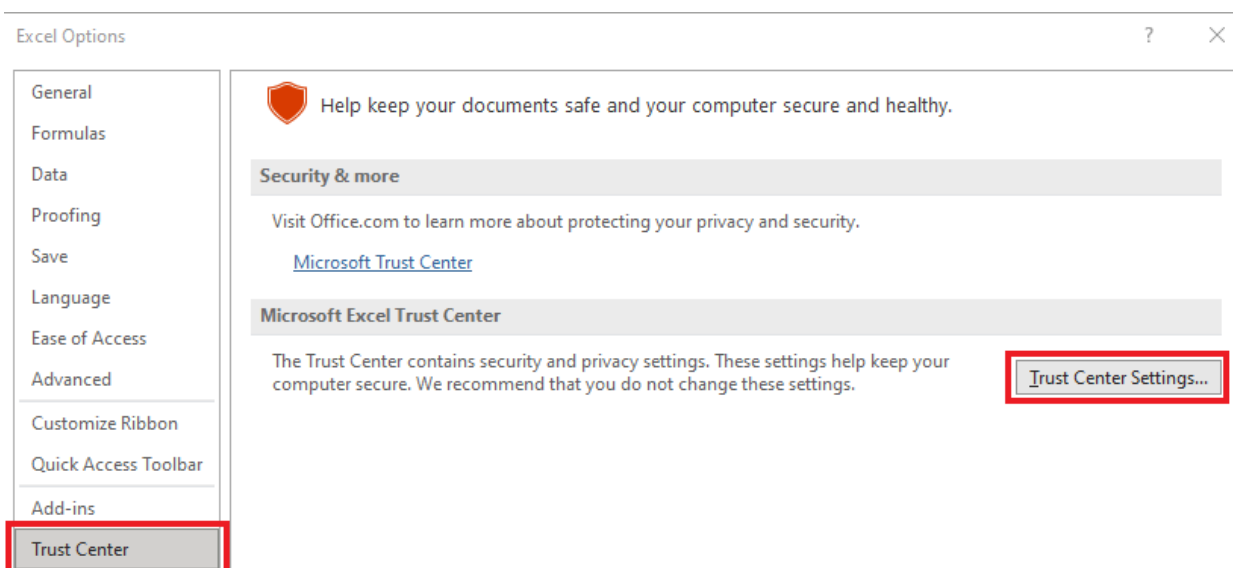
- Microsoft Support - Trusted Documents
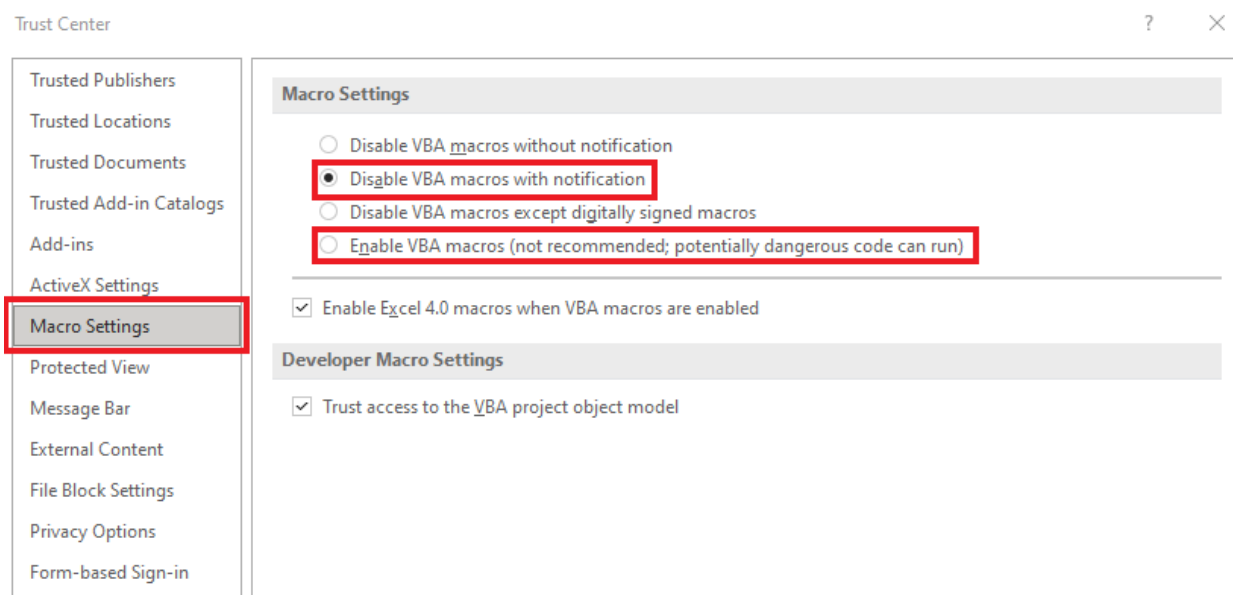- Microsoft Support - Trusted Locations

Method B – Enable Macros and External Data settings

Excel Macros and External Data Connections can be enabled to *'always allow'* or *'allow with prompts'* by manually setting the Excel Trust Center's "Macro Settings" and "External Content" settings.
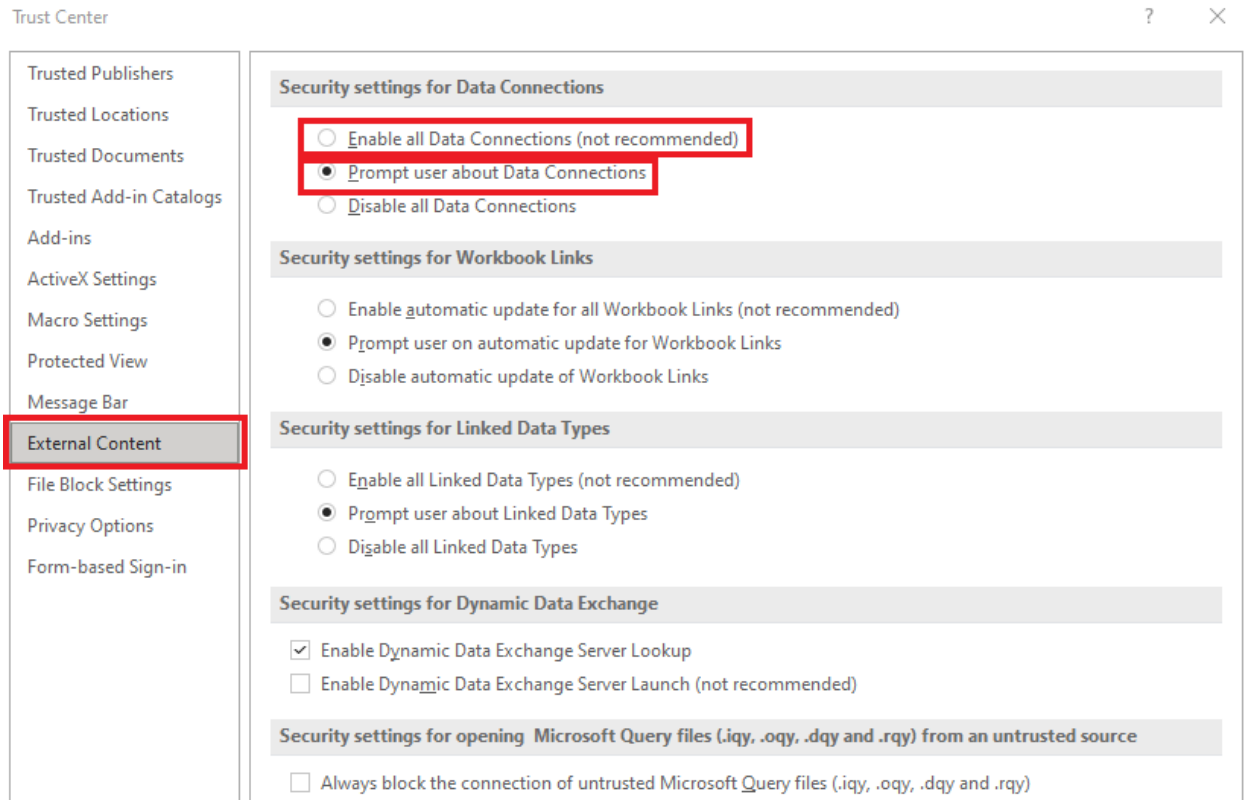
1. In **Microsoft Excel** click the **File** menu in the upper left hand corner, then choose the **Options** menu.

2. In the Excel Options menu screen, click the **Trust Center** menu in the left menu pane, then click the **Trust Center Settings…** button from the browse screen.

a) From the **Trust Center Menu** screen select the **Macro Settings** menu option in the left menu pane and choose **"Enable VBA macros"** _OR_ **"Disable VBA macros with notification"**. *The selection of this option should follow your companys IT security policy.*

b) From the **Trust Center Menu** screen select the **External Content** menu option in the left menu pane and choose **"Promt user about Data Connections"** _OR_ "**Enable all Data Connections**". _The selection of this option should follow your companys IT security policy._

c) Click **OK** to save.
d) **Exit** and **restart Excel**.

**Note:** Enabling Macros and External Data Connections could expose Microsoft Excel to potentially harmful or malicious code. When this option is selected users should use caution and only open Excel files from trusted sources.