

# Technical Notes: Working with MS Excel-Based Tools



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# Basic Configuration & Information

Read this section to learn about requirements your hard- and software need to fulfill as well as other important information you need to know to be able to work efficiently with next level Excel-based tools.

## System Requirements

**Software:** All tools are based on a Microsoft (MS) Windows environment, more specifically MS Excel. We recommend you use the latest versions of Excel, because only the latest versions are updated regularly.

**Hardware:** No specific requirements, though Microsoft Excel will run more smoothly the more RAM is provided. This will increase your work experience and stability of the tools.

## MS Excel Updates

Keep your Excel version updated. Microsoft provides updates to increase the performance, stability and to fix bugs within MS Excel.

## Enable Macros, Correct Data Format

Keep in mind that all next level tools require VBA scripts to run properly. It is therefore necessary to enable macros to ensure that all functions are available to you. If macros are deactivated, some formulas will not deliver expected results and none of the buttons will work within the tools. The same will happen in Excel versions 2007 or higher if you save your file in the wrong data format. Saving it as ".xlsx" will remove all macros from your file. This is explained in more detail in the last section

**"Required Configuration"** (page 6).

**Be sure to always enable macros when working with next level tools.**

## Drag & Drop, Copy & Paste

When working with MS Excel-based tools, some rules need to be followed. In general, the templates are locked, however, using Excel functions like copy & paste or drag & drop within editable cells is still possible to some extent. While copy & paste can only harm the layout, cut & paste or drag & drop might damage the tool's structure and, consequently, its functionality (e.g. formulas referring to cells that don't exist anymore lead to error messages and malfunction of the tool).

**Never use standard functions like drag & drop or copy/cut & paste when running next level tools within a MS Excel application.**

Alternatively, the option "Paste Contents" can be used (in MS Excel 2002/2003 in the "Edit" menu; in MS Excel 2007/2010 in the "Start" menu). If the content of the clipboard is inserted as a value, it won't harm the structure or layout.

The tools are basically locked, no worksheets can be deleted, renamed, or pasted. Rows or columns cannot be manually inserted, moved or deleted. Even texts cannot be manually edited, and cells cannot be formatted.

**If endless changes within the application were allowed, the functionality of the tool could not be guaranteed. Editable cells can be visualized by clicking a button on the cover page.**

## Data Storage

MS Excel-based tools can be treated like any common data and can therefore be uploaded to any given data-storage system. When using web-solutions (e.g. Intranet, SharePoint, etc.) be sure not to open MS Excel files in your browser. It is recommended to save the file on your computer and then open it in MS Excel. Basically, we suggest temporarily storing your files on your desktop and working with them offline. Once you are done with your work, reupload your file to the service in use.

## Exchanging Project Data with Co-Workers

The tools offer many ways of exchanging project data with others. These possibilities were integrated as interfaces. The existing function "Share Workbook" in MS Excel, which enables several users to work on the same file, cannot be used in tools with macros. The macros will be disabled when selecting this option.

## Projector / Docking Station

You might experience issues when connecting projectors or docking stations to your PC while working with MS Excel tools. When adapting the screen resolution, diagrams or buttons might be distorted or downsized. To avoid similar problems, it is recommended to start Excel after connecting and setting up projectors/docking stations.

## Mac / Open Source

**All tools can be used in alternative operating systems. However, full functionality is only guaranteed when using MS Excel on Windows systems.**

## Printers

The tools have routines running in the background that use printer drivers. It is necessary to have a printer installed to guarantee full functionality of the tool.

# Troubleshooting

From time to time, problems may arise when working with tools in the system environment of the customer. These errors are mostly due to specific system settings of the customer's environment.

## Potential Problems & Solutions

In case you face problems or error messages that cannot be resolved by following the suggested solutions from the system (e.g. input error) read the following list of frequently occurring errors:

- > Dropbox desktop application: When closing the file, you are asked to enter the VBA password – this error is related to the installation of “Dropbox”. This error has already been reported to “Dropbox” but has since not been resolved (March 2016). Currently the only solution is to uninstall “Dropbox” (the desktop application is not essential when using Dropbox).
- > Opening the file directly in an email might lead to a system crash – should you face this problem consider saving the file locally and try opening it again.
- > Opening and/or saving the file directly on SharePoint: This may lead to a variety of errors. They are mostly related to bad network connections. To avoid this problem, it is recommended to temporarily save the file locally and reuploading it to SharePoint when your work is done.
- > Unreliable network connection: This might cause problems with saving or automated caching. Unfortunately, MS Excel is not able to perform proper saving processes with unstable network connections. This may lead to damaged files (especially data formats). However, up until now, we have always been able to restore content (e.g. project plans). Again, the suggested solution to avoid problems like that is to save files locally on your desktop during the working process. If the file cannot be restored by performing a version import, next level solution can restore your data.

## Get in Touch with next level solutions

If nothing in the list above is applicable to your problem or if you already have a damaged file, please do not hesitate to contact next level solutions. Please provide the following information – the files will be handled with care and confidentiality:

- > Screenshot of the error message.
- > Description of the last performed action and the expected result. Is it a reoccurring error or does it only occur on one specific computer? Have different users (maybe even with different operating systems) worked with the file?
- > Corrupted file (version before and/or after occurrence of the error)
- > Latest MS Excel version number and language (Excel 2007 & 2010: File/Help, Excel 2013 or higher: File/Account/Product Information)
- > Operating system (e.g. Windows 10)
- > Customer specific features (use of Citrix, special MS Office Add-Ins, virus security scan...)

# Required Configuration (depending on your Office Version)

## MS Excel 2002/2003

### Macro Security

The macro security stage in MS Excel must be set to medium or low. By default, it is set to high. In order to use MS Excel-based tools properly, macros have to be activated. The security stages of macros may be found in Extras / Options / Security / Macro Security / Security Stages.

### Updates

When using MS Excel 2002 (XP), all MS Office updates must be installed, so that the Excel version number is at least 10.68xx.xxxx

### Data formats

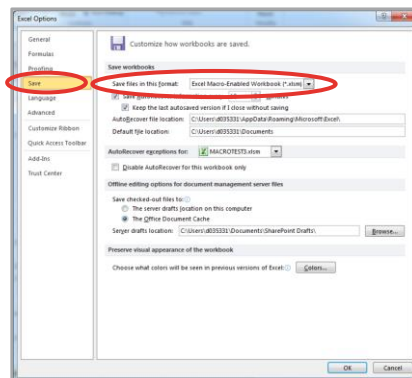
The format of the tool templates is \*.xlt. When saving, the data format \*.xls is automatically suggested (e.g. when saving project handbooks in next project).

## MS Excel 2007 or Higher

### Office 2007+ data format

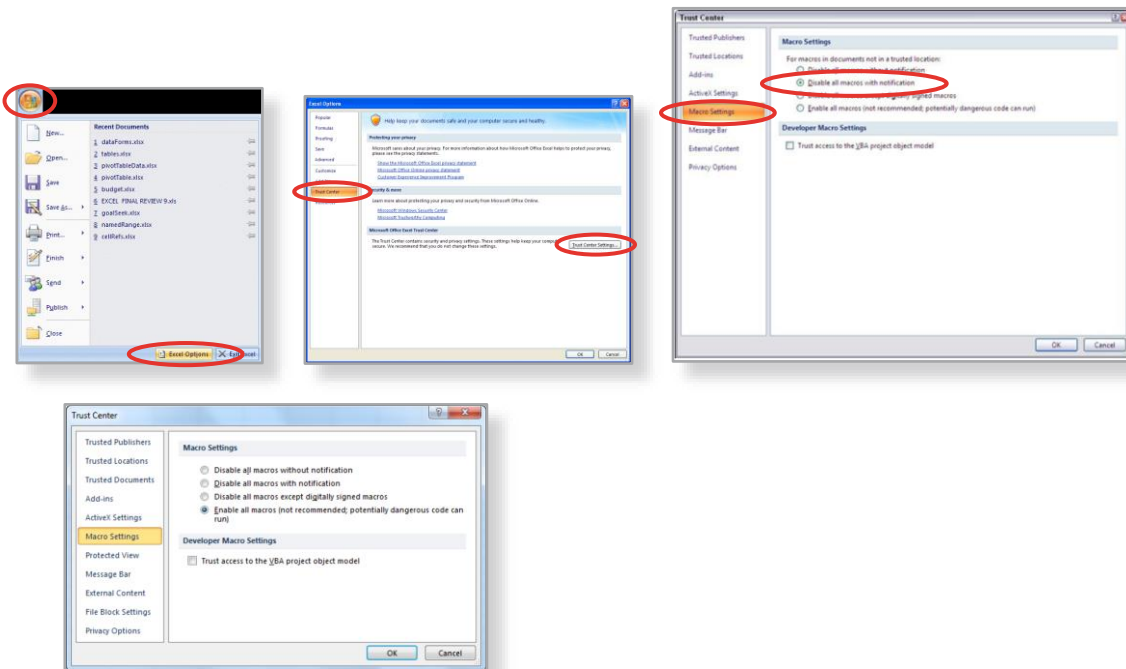
**The data format of the tool template is usually an \*.xlsm file. When saving, the data format \*.xlsx is automatically suggested. Therefore, the user has to change the data format manually to \*.xlsm or \*.xlsb when saving the file. Otherwise the file is saved without macros and will not work properly.**

It is possible to change the suggested default data format of Excel work sheets to \*.xlsm instead of \*.xlsx when saving them. To do so, navigate to Office/Excel Options or Data/Options. In the "Save" category, go to "Save files in this format" and choose the file format "Excel Macro-Enabled Workbook (.xlsm)" from the dropdown menu.

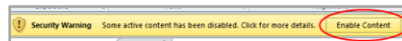


## Macro Security Office 2007

The macro security stage should already be configured properly by default. Where required, review the settings by clicking on “Trust Center” in the “Excel Options” menu. Then click on “Macro Settings” and select “Disable all macros with notification”.



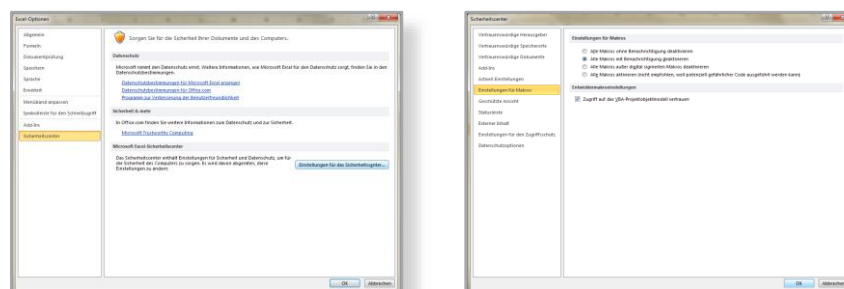
When opening MS Excel files, you are now warned that macros are deactivated.



In order to use the VBA codes running in the background, be sure to click the “Enable Content” button. After confirming, the file automatically restarts with macros activated.

## Macro Security Office 2010

The macro security stage should already be configured properly by default. Where required, review the settings by clicking on “Trust Center” in the “Excel Options” menu. Then click on “Macro Settings” and select “Disable all macros with notification”.



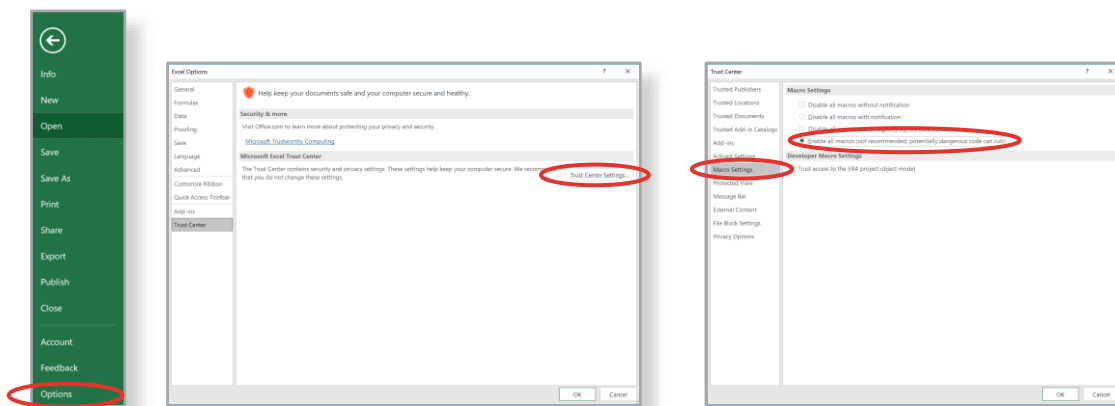
When opening MS Excel files, you are now warned that macros are deactivated.



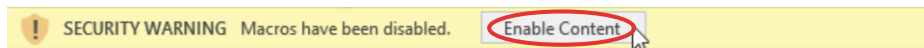
In order to use the VBA codes running in the background, be sure to click the “Enable Content” button. After confirming, the file automatically restarts with macros activated.

### Macro Security Office 2013/ Office 2016

The security stage in the Trust Center should by default be set properly. Where required review the settings by navigating to the Trust Center within the MS Excel options menu. Then click on Macro settings and “Disable all macros with notification” should be selected.



When opening MS Excel files, you are now warned that macros are deactivated.



In order to use the VBA codes running in the background, be sure to click the “Enable Content” button. After confirming, the file automatically restarts with macros activated.