

Checking and changing macro settings in Excel

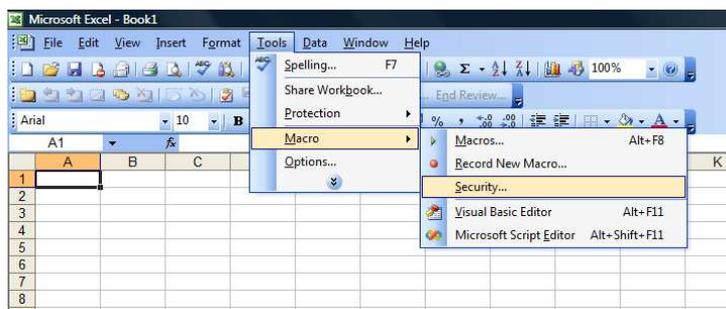
The software uses macros (small programs) to navigate around and to prepare your return for filing with HMRC. If macros are not enabled, you will not be able to use the software. Because Open Office does not run macros this makes our software unsuitable for use in Open Office. If you are not sure which version of Excel you are running, the pictures below should make it clear.

All Excel versions PRIOR to 2007

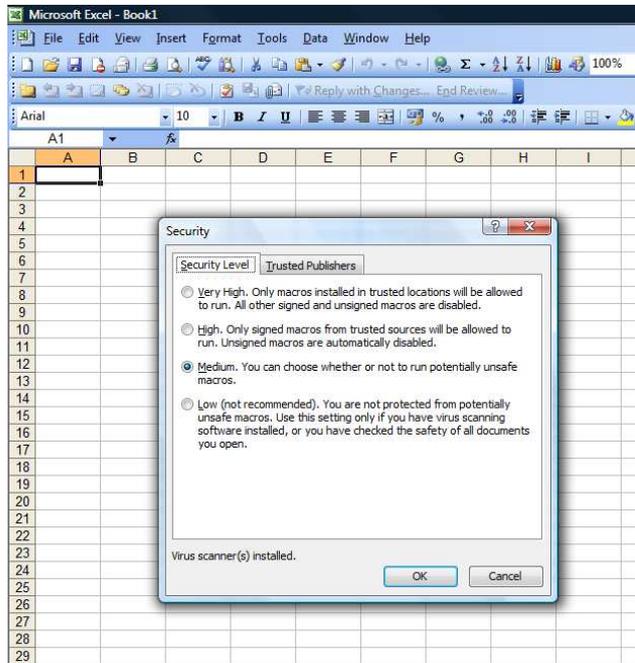
To check or change the macro settings BEFORE you use our software open a blank worksheet by clicking on the Excel icon on your start menu. If you already have the program open, you should close it first (make sure you have saved it somewhere easy to find first).



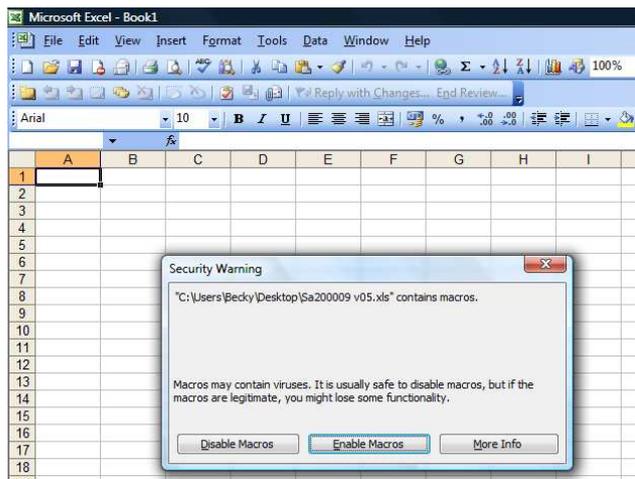
If the icon does not show in the start menu, look for “Microsoft Office” in “**All Programs**” and you will find it there. With the blank worksheet open, select “Tools” from the menu at the top of the screen, and from the sub menu that drops down choose “Macro”. This brings up a further sub menu from which you should select “Security”.



This displays a list of choices, from Low to High (or very high in some cases). You should ensure that “Medium” is selected. This will allow you to choose whether to allow macros to run or not when you open worksheets, and does not compromise security unduly. If you are opening spreadsheets from an unknown source you should be aware that running macros can be a security risk.



Choose “OK” to accept this setting. Your macro security now has the correct setting, and you can now open your tax return software by choosing “File”, “Open” and browsing to where you saved it. When the file opens you will be offered a choice :



By choosing “Enable Macros” the file will open with the macros active, and you are ready to go. When you save the file, the macro settings will be applied so you should only need to “Enable Macros” each time you open the return.

Excel 2007

When you open the return in Excel 2007 you will see a warning message like this :



Click “Enable Content” and this will treat our software as a “trusted source” which will allow the Macros to run every time you open the file.

There is more help with Office 2007 on the internet here : <http://office.microsoft.com/en-gb/excel-help/enable-or-disable-macros-in-office-files-HA010354316.aspx#BM1> (Click this link and it will connect you to the page).

Excel 2010 is similar – you can allow the content as you open the file.