Important technical notes when working with tools based on MS Excel

Basic configuration

System requirements

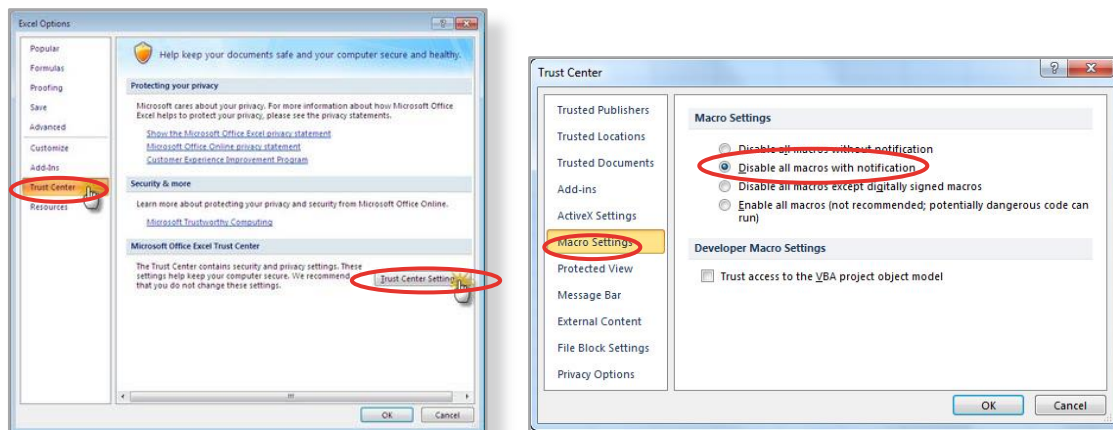| Category	Minimum requirement	Recommended
Hardware	PC, 1 GB RAM, 10 MB hard disk storage unit per MS Excel file	PC, 2 GB RAM, sufficient free hard disk storage for the MS Excel files
Software	MS Windows XP or higher MS Excel 2002 or higher (incl. all available service packs)	MS Windows XP or higher MS Excel 2003 or MS Excel 2010 MS Project 2000 or higher SQL server 2008
System environment	-	Network access to project data (Authorization to release XML files or connection to SQL Server)

Required settings for MS Excel 2002/2003

The macro security level in MS Excel must be set to medium or low. By default it is set to high. To use the tools based on MS Excel macros must be enabled. The security level of macros can be found under Tools / Options / Security / Macro Security / Security Level.

In MS Excel 2002 (XP), all Microsoft Office updates should be installed so that the MS Excel version number is at least 10.68xx.xxxx.
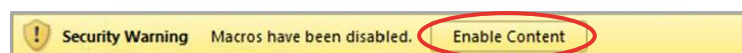
The file format of the tools is a *.xlt file template, which automatically suggests an *.xls file (for example, next project for each project manuals) when saving.

Required settings for MS Excel 2007+

The security level in the Trust Center should be configured accordingly by default. If necessary, check the settings via the button "File/Office" of the MS Excel options, then click "Trust Center". In "Trust Center settings" the "Macro Settings" should be set to "Disable all macros with notification".

If you open an MS Excel file, an additional dialog box appears below the menu bar of MS Excel, which makes you aware that the macros have been disabled.
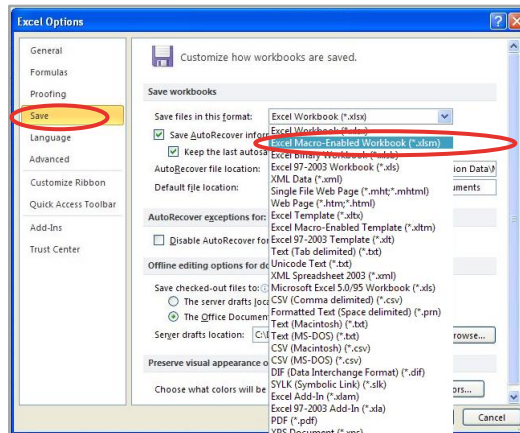
To use the VBA routines, you have to click "Options" and select "Enable this content". After confirming, the MS Excel file will automatically re-open with macros enabled.

File format Office 2007+

> **The file format of the tool template is in most cases a *.xltm file which automatically suggests a *.xlsx file when saving. When saving the user has to manually select the file format *.xlsm, otherwise the tool is saved without VBA (macros) and becomes unusable**

It is possible to have MS Excel automatically suggest *.xlsm rather than *.xlsx. Go back to the Office/Excel Options or File/Options/Save and change the selection to "Save file in this format" to "Excel Workbook (.xlsm)".

Important notes

Enable macros

Under basic configuration a central section is found. Please note that MS Excel can perform VBA routines that are required. If macros are disabled, specific formulas provide no results and buttons cannot be pressed.

> **If macros are blocked, the tools cannot be used as intended. Make sure to enable them when opening the tool.**

Drag & Drop, Copy & Paste …

When using tools based on MS Excel certain conditions must be considered. The templates are basically locked but editable cells can be partially copied, pasted and moved as usual. While copying and pasting will only transfer formatting and, in the worst case, only damage the layout, Cut & Paste or Drag & Drop (move) will cause structural damage to the tools (if a formula refers to a cell that no longer exists, the formula results in an error).

> **Classic Drag & Drop and Copy/Cut & Paste of the application MS Excel must not be used in the tools.**

Alternatively, the option "Paste contents" can be used (can be found in MS Excel 2002/2003 in the "Edit" menu in MS Excel 2007/2010 in the "Start" menu). If the contents of the clipboard are inserted as a value, it won't cause damage to the structure and layout.

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

AUSTRIA
CROATIA
GERMANY
SLOVAKIA
SOUTH AFRICA
SWITZERLAND

If it was possible to make any change in the MS Excel template, the functionality of the tool could not be ensured. The editable fields can be visualized via a button on the cover sheet on the background of the cell.

File storage

The tools based on MS Excel can be treated like other files and therefore also loaded into a document management system. However, when using a web integration (such as an intranet or a SharePoint server solution) you need to make sure not to open the MS Excel application in a browser. If this is not possible, the file should be first saved and not opened directly in the browser.

Exchange project data with others

The tools offer different ways of exchanging project data with others, which were specially integrated through interfaces. The existing function "Share Workbook" in MS Excel that enables several users to work at the same time, cannot be used in tools with saved macros. The macros will be disabled.

Projector / docking station

Connecting projectors or docking stations often leads to problems while working with the tools. Changing the screen resolution distorts or minimizes graphics and buttons. To avoid this, start MS Excel when the docking station or the projector were successfully connected.

Mac / Open Source

Some tools can be started and used in operating systems other than Windows; however, the full functionality can only be guaranteed in MS Excel on Windows.

Printer

The tools use some of the background routines that access a printer driver. Therefore, the installation of a printer is necessary to provide full functionality.