

CAMPUS FINANCIAL REPORTING

Downloading and Installing Macros For Excel 201x

To REMOVE an Existing Version of the Macros

1. Launch Excel.
2. Go to **File** and then **Options**. Click on **Quick Access Toolbar**. In the right-hand pane, you should see “Campus_Financial_Reporting” in the list. Click on it and then press the << **Remove** button. Press **OK** at the bottom of the dialog box.
3. Exit Excel and re-launch it. You should not receive any error messages pertaining to missing a “campus_financial_reporting_macros_v5.xlam” file (note you may also see a file with ‘v1’, ‘v2’, ‘v3’, or ‘v4’ instead). If this is correct, proceed to adding the new macros.

To ADD the New Version of the Macros

1. Open Mozilla Firefox as your web browser to download the new macros. Once open, navigate to the FAS web site: <http://finance.wfu.edu/cognos>. Click on the link entitled “Financial Reporting Macros”. Save the “cognos_financial_reporting_macros_v6.xlam” in the C:\Users\[your-username]\Documents\ folder.
2. Launch Excel.
3. Go to **File** and then **Options**. Click on **Add-ins**. Make sure that **Excel Add-ins** is selected beside **Manage** from the bottom of the right pane and click **Go**. Choose **Browse** and navigate to the C:\Users\[your-username]\Documents\ folder and select cognos_financial_reporting_macros_v6.xlam. Press **OK**. Make sure that Cognos_Financial_Reporting_Macros_V6 is checked under Add-ins available and press **OK**.
4. Go to **File** and then **Options**. Click on **Quick Access Toolbar**. Click on the drop-down box above the left-pane called **Choose commands from** and select **Macros**. Select “Campus_Financial_Reporting” and press the **Add >>** button.
5. If you would like to change the default icon that displays on the toolbar, click on **Modify...** and choose your desired icon. Press **OK**.
6. Press **OK** on the Excel Options dialog box.
7. You are now ready to begin using your macros!