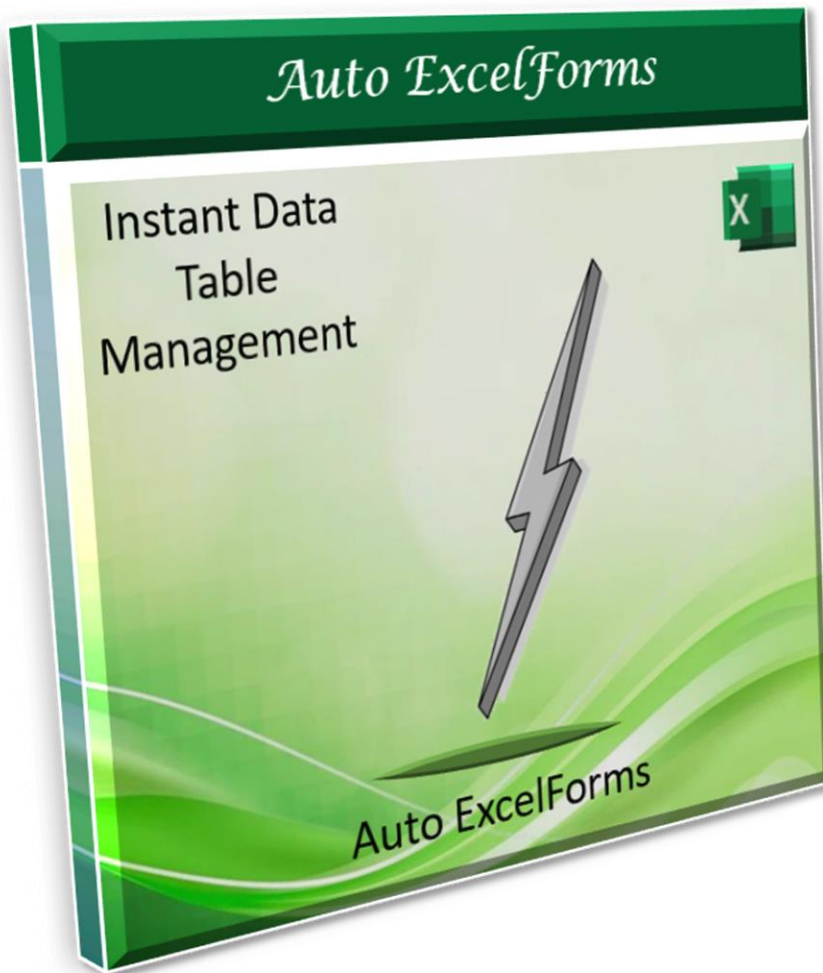


Auto ExcelForms Installation



"A unique add-in for Excel to instantly enhance your data with highly Customizable, professional user forms and much more."

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1 Windows OS

1.1 Installation Options available

On a windows computer there are three options available for installing Auto Excelforms.

You may choose, in order of preference:

1. The windows installer (an executable windows .exe file)
2. Install the add-in via a standard excel workbook file
3. Manual installation

The first method will install the add-in and will also include the help pdf and sample data files. It will also allow for uninstalling via the windows uninstall utility.

With the second and third methods, you will have to download the pdf help file and sample data separately.

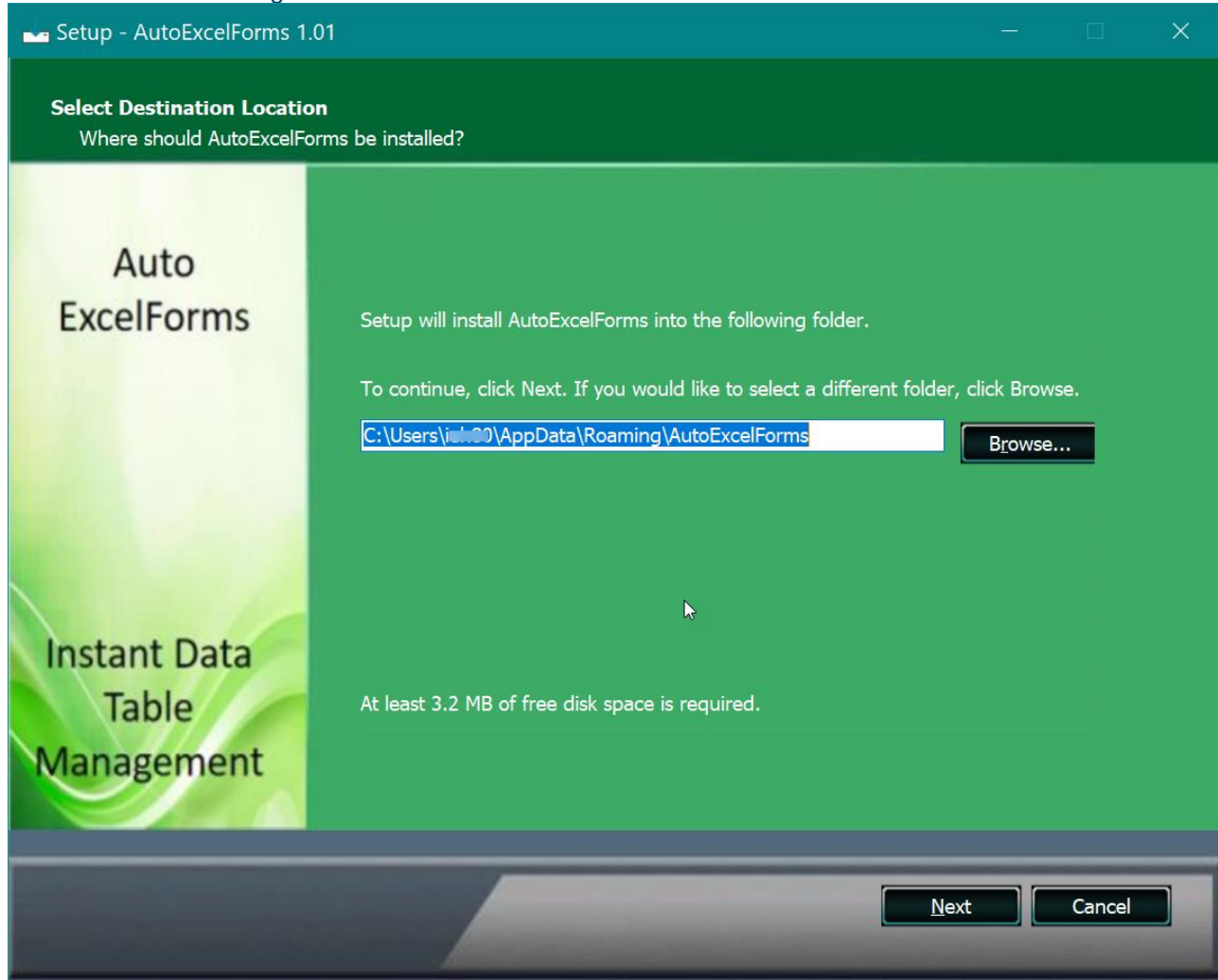
The third method requires manual installation.

1.2 Windows Installer

The windows installer is a windows executable file **Auto ExcelForms v1.xx.exe** that will install the standard Excel add-in, *AutoWinForms.xlam* along with the user documentation in a folder of your choosing. It will register and activate the add-in with Excel so you won't have to do this manually.

- (i) Download and unzip the windows installer *Auto ExcelForms vX.xx.exe*
- (ii) *Close the Excel application if it is opened* then
- (iii) double click on the downloaded executable file and follow the prompts.

Windows Installer Dialog



You can accept the suggested folder or you can Browse to another location for the installation of the files. You will be prompted to optionally activate the add-in or not. If you untick the box to do so you will have to manually activate the add-in later.

Remember to ensure that within Excel, macros should be enabled.

1.3 Installation from Excel workbook file

Auto ExcelForms can be installed by opening a standard macro-enabled Excel file: -

InstallWinForms.xlsm.

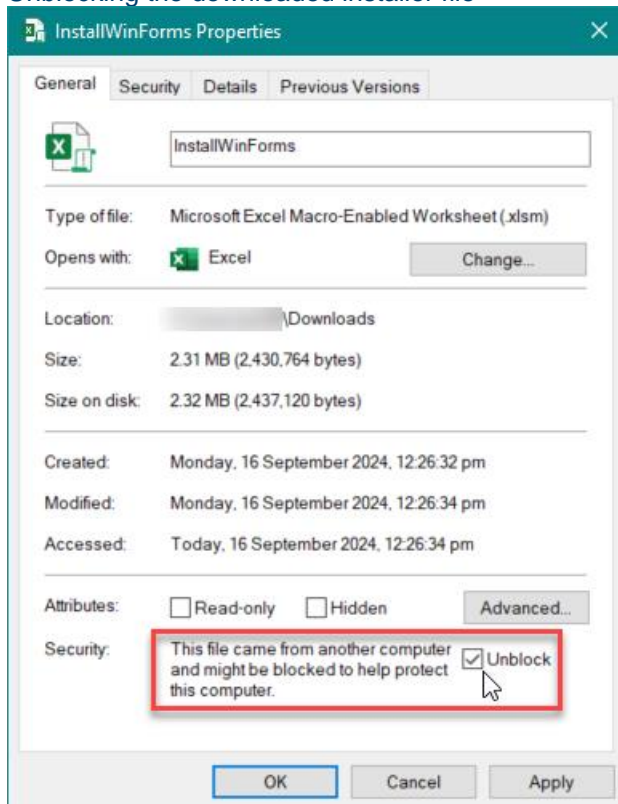
This is included in a compressed zip file which can be “unzipped” to a folder of your choosing.

The Excel installer file, ***InstallWinForms.xlsm***, will most likely need to be unblocked since Microsoft will usually block files with executable code that are downloaded or come from another computer. This includes perfectly safe macro-enabled Excel workbooks.

To unblock the file:

1. Use file manager to locate the installer file
2. Right click the filename and select Properties
3. Click the unblock field so that the tick mark is displayed as below.

Unblocking the downloaded installer file



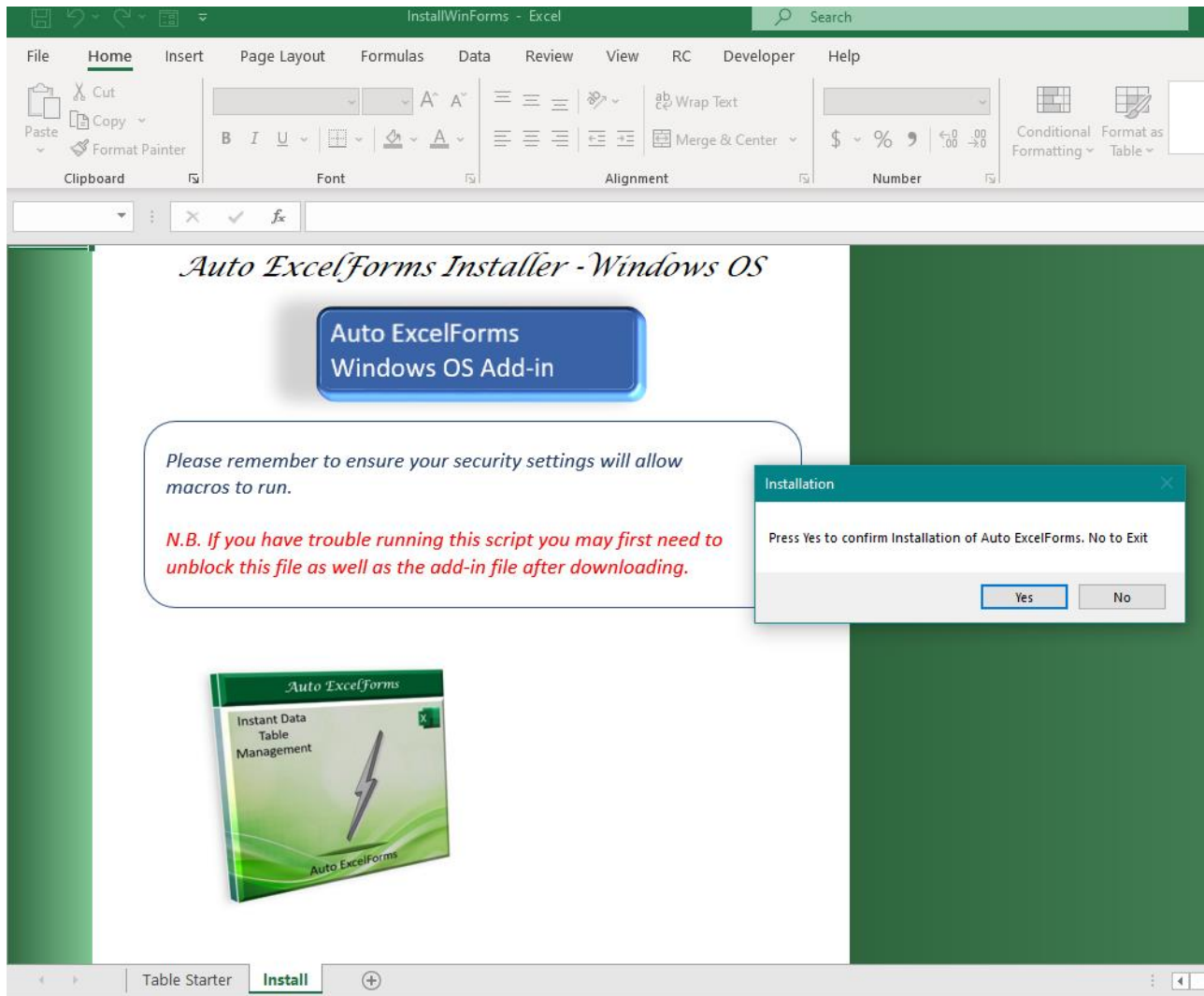
Once the installation excel file is unblocked, you should ***close Excel if it is opened***, then double click or click and enter to launch Excel with the installer.

continued.....

Installation from Excel workbook file contd.

Click on Yes to the prompt that appears. After a short while, Excel will automatically close. When you re-open Excel the add-in will have been installed.

Installation from Excel workbook screen:



1.4 Manual Installation

Auto ExcelForms is a standard Excel add-in AutoWinForms.xlam packaged in a zip file.

Unzip the file, and store the add-in in the User Add-in Library, which is

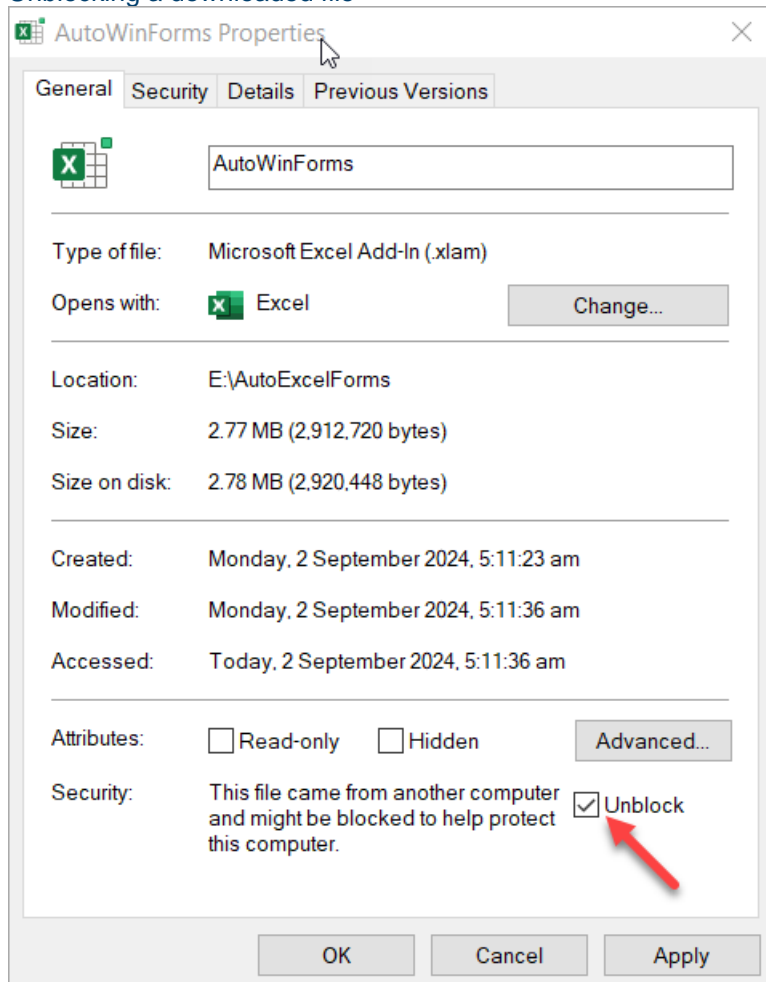
C:\Users\USERNAME\AppData\Roaming\Microsoft\AddIns\

and can be found by typing %appdata%\microsoft\addin in windows explorer

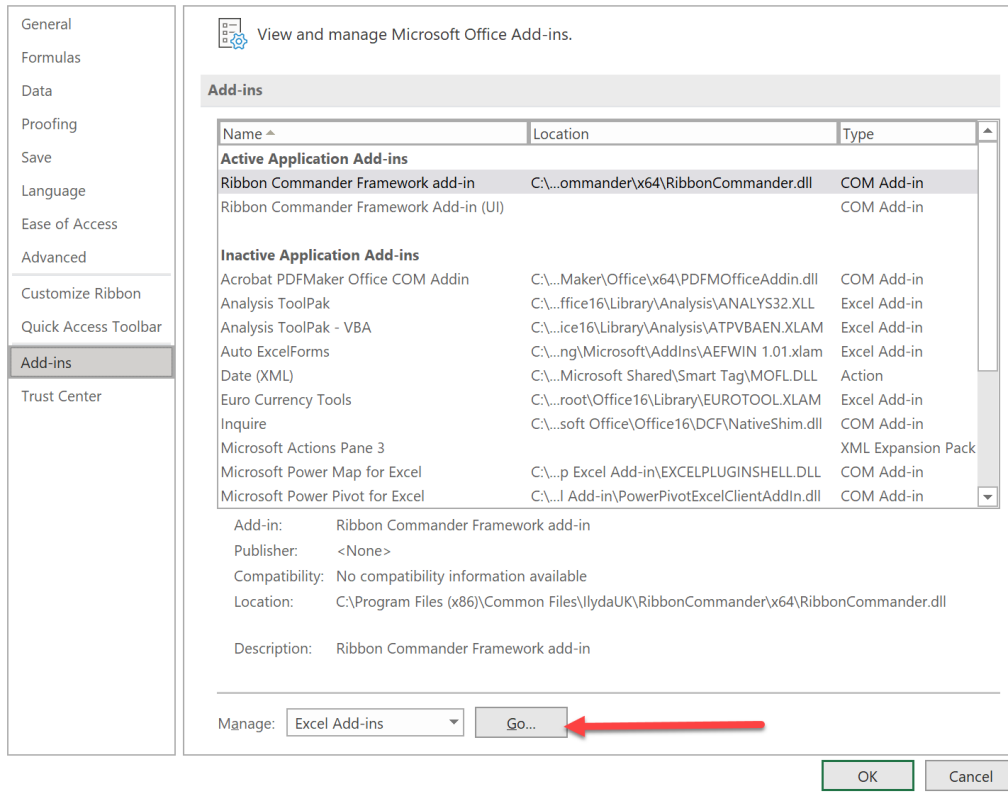
You can store the add-in in just about any folder, but when you use this default Add-In folder, it's easier to find the add-in from within Excel when you install it.

You may need to unblock the add-in since Microsoft will usually block programs and add-ins that are downloaded or come from another computer.

Unblocking a downloaded file

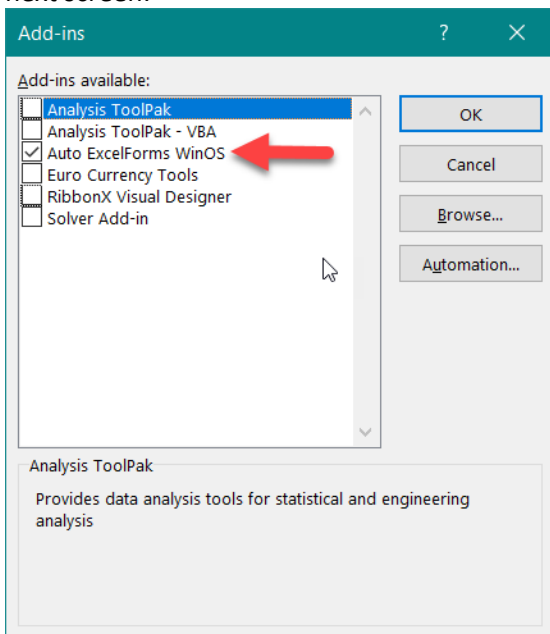


Click on the File tab > Options > Add-Ins to bring up the following screen:



Click on **Go**.

If you saved the add-in to the default add-in folder you should see the Auto ExcelForms add-in appear in the next screen:



Check the box for Auto ExcelForms , then click OK, and the add-in will be installed and available whenever you run Excel. If you installed the add-in to a different folder you will need to click Browse and select the xlam from that location.

2 MAC OS

2.1 Installation Options available

On a Mac OS computer there are two options available for installing Auto Excelforms.
You may choose, in order of preference:

1. Install the add-in via a standard excel workbook file
2. Manual installation

The second method can be used if you wish to install the add-in to a special folder other than the default folder for add-ins, or if you are having difficulty with the first method.

2.2 Installation from Excel workbook file

Auto ExcelForms can be installed by opening a standard macro-enabled Excel file: -

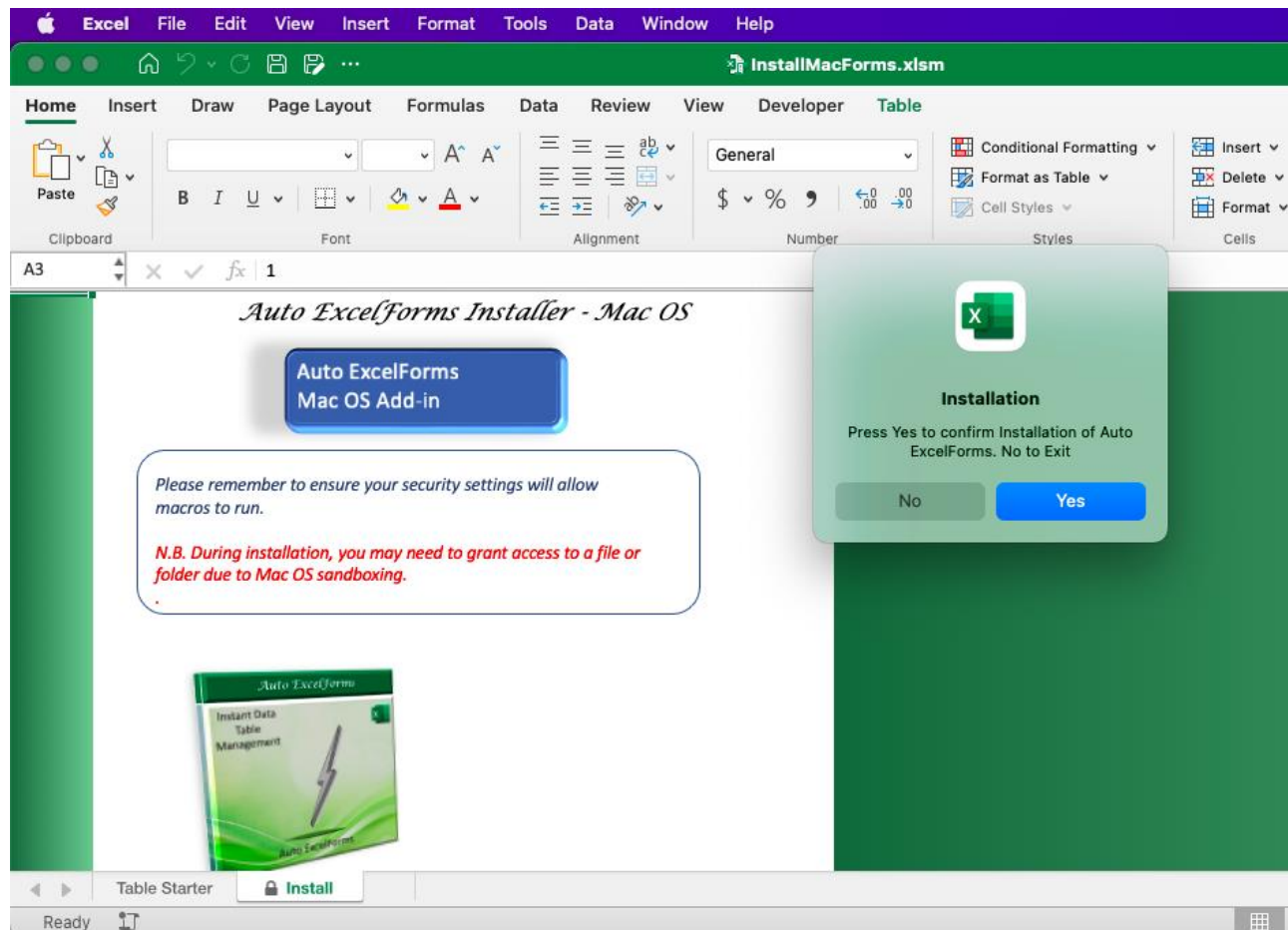
InstallMacForms.xlsm.

This is included in a compressed zip file which can be “unzipped” to a folder of your choosing.

Once the installation excel file is unzipped, you should **close Excel if it is opened**, then double click or click and enter to launch Excel with the installer file: ***InstallMacForms.xlsm***

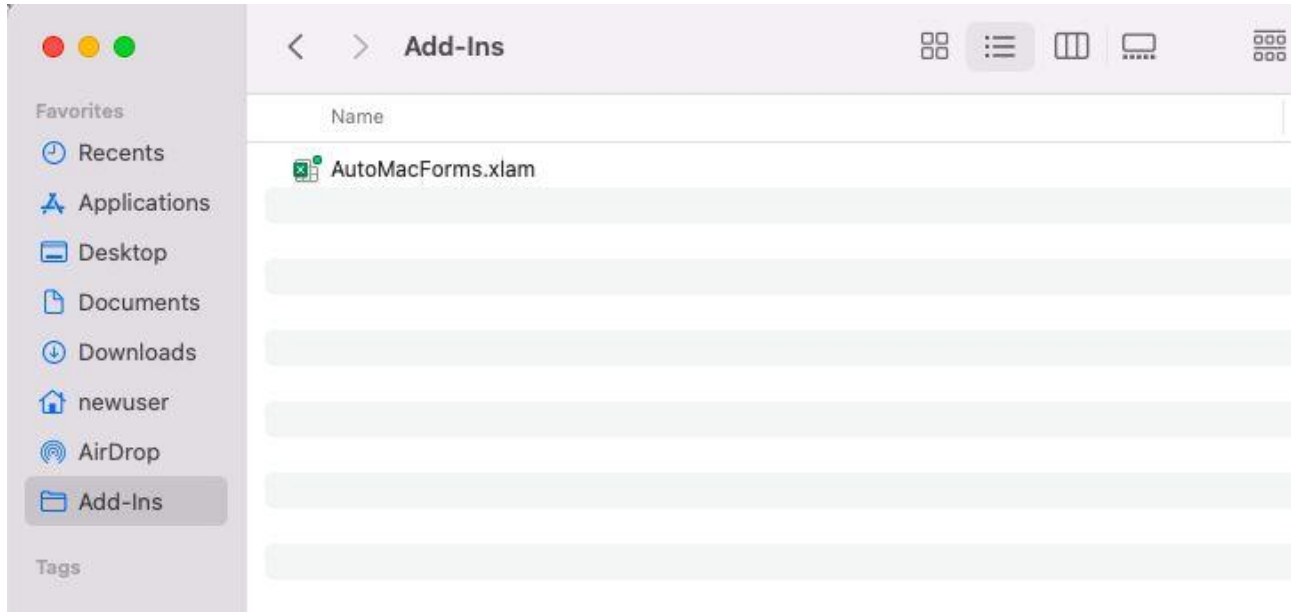
1. You will be asked to enable macros for the workbook. Respond affirmatively.
2. When the install screen appears, Click on Yes to the prompt that appears.
3. After a short while, Excel will automatically close. When you re-open Excel the add-in will have been installed.

Installation from Excel workbook screen:



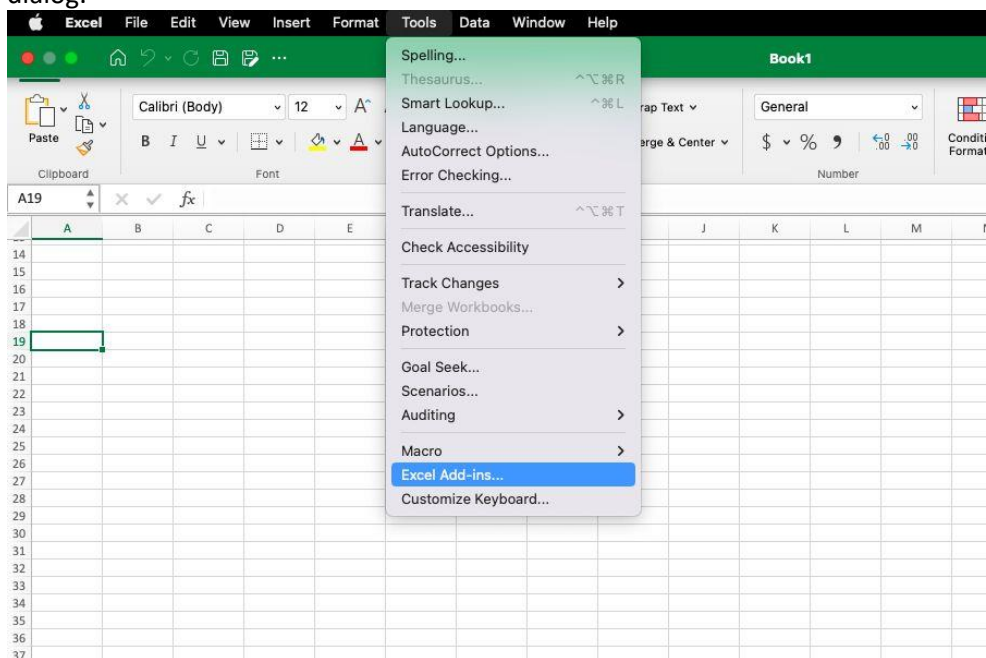
2.3 Manual Installation

Auto ExcelForms for Mac is a standard Excel add-in AutoMacForms.xlam packaged in a zip file. Unzip the downloaded file to extract the Excel addin. Open a Finder window to search for the add-ins folder and extract the file to this location.

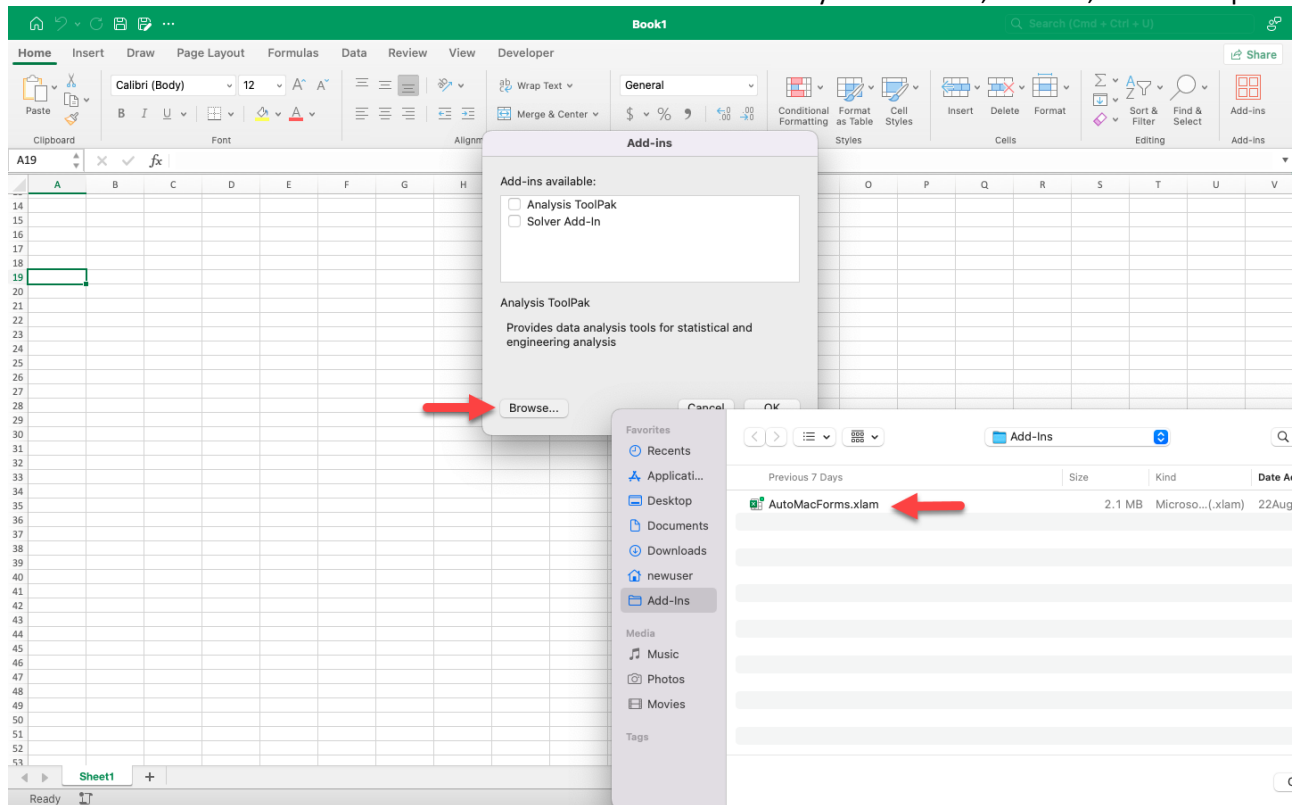


Open Excel.

From the top-level Mac menubar, click the Tools menu and select Excel Add-ins. This will open the Add-ins dialog.



Browse to the add-ins folder and select the Auto ExcelForms add-in you extracted, select it, and click Open.



A window allowing you to select the Add-in will appear.
Click OK

