

How to install a Windows Excel add-in

These instructions are appropriate for each of the three add-ins provided by TreePlan Software:

- TreePlan for decision trees

- Sensit for tornado charts

- SimVoi for Monte Carlo simulation

The file is an XLAM type, and the filename includes the XLAM extension.

Sensit and SimVoi work with all versions of Excel. TreePlan works with all versions except version 2206. To check your version, choose File > Account > About Excel.

There are two ways to access your add-in.

Install the add-in file. Installation is a simple one-time process requiring the Windows File Explorer and several mouse clicks. The add-in features will be available automatically during subsequent Excel sessions.

Open the add-in file via Excel's File Open command. The add-in features will be available only during your current Excel session. The next time you start Excel you will need to open the add-in file again to use its features. Go to the end of this document for detailed instructions.

Whether you install or open the add-in, it is important to verify that the add-in file is unblocked before trying to use it. And if you want to use TreePlan it is also important to enable macros.

How to find your add-in file

We recommend that you run Windows File Explorer, select the View ribbon, and check the box for "File name extensions" (on the far right of the View ribbon).

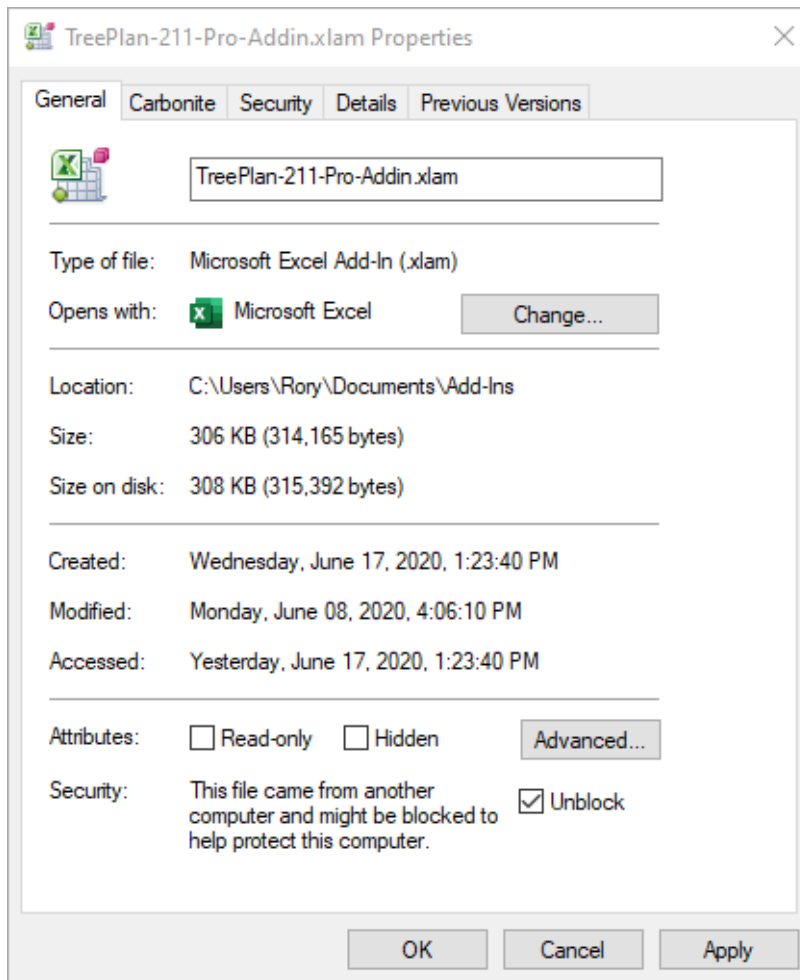
Unblock the add-in file

If the add-in file was obtained from another computer, downloaded from a website, or attached to an email, it is likely the add-in file has been blocked by Windows security features.

Unless you unblock the file, your add-in will not run in Excel, and Excel will not warn you about the problem.

Run Windows File Explorer, navigate to the add-in XLAM file, right-click the file, and select the Properties tab.

In the Properties window, select the General tab, and look for the Security: Unblock checkbox in the lower right corner.



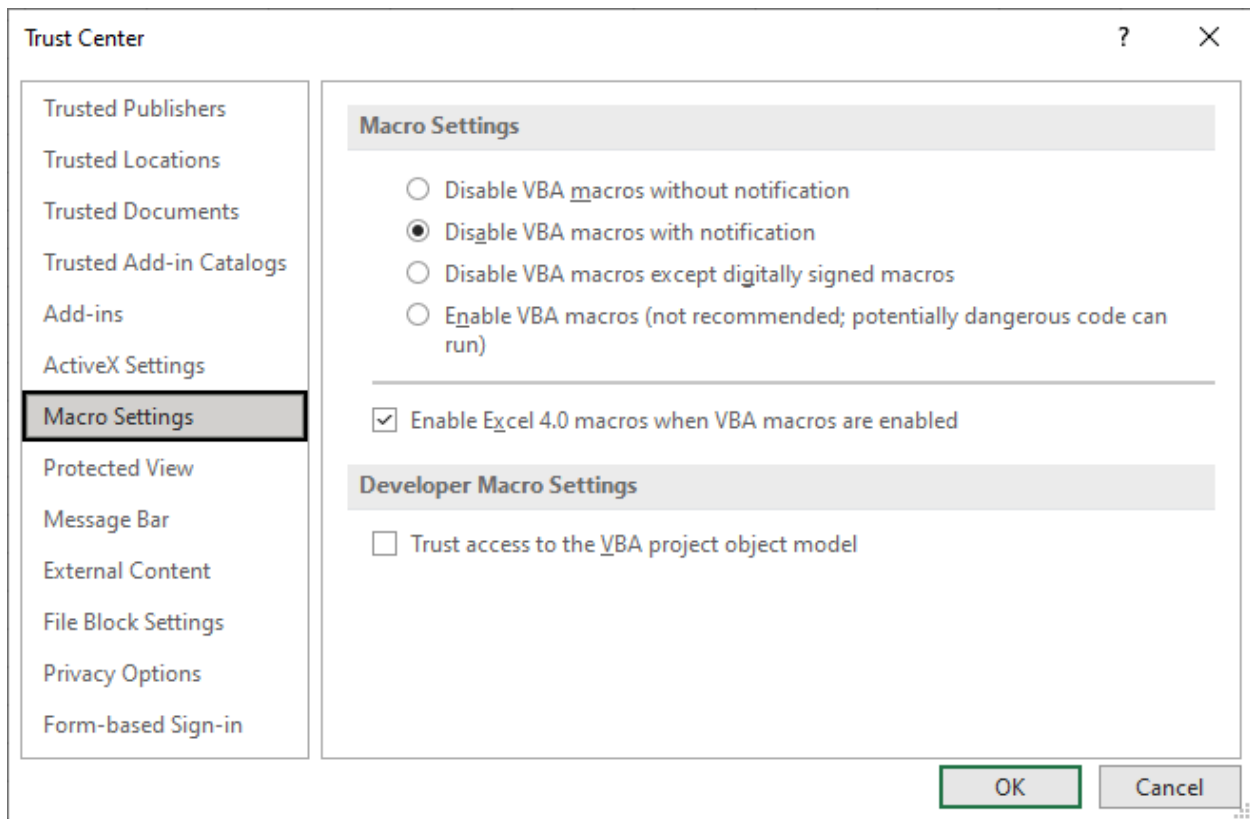
If you see the Unblock checkbox, be sure it is checked, and click OK.

It is only necessary to unblock the file once.

If there is no Security: Unblock checkbox in the Properties General window, click OK.

Enable macros for TreePlan

Before you try to use TreePlan, start Excel, choose File > Options > Trust Center > Trust Center Settings > Macro Settings, select the option “Disable VBA macros with notification,” and check the box “Enable Excel 4.0 macros when VBA macros are enabled” as shown below.



Then click OK twice, quit Excel, and restart Excel before running TreePlan.

You do not need to enable macros if you are want to run only SimVoi or Sensit.

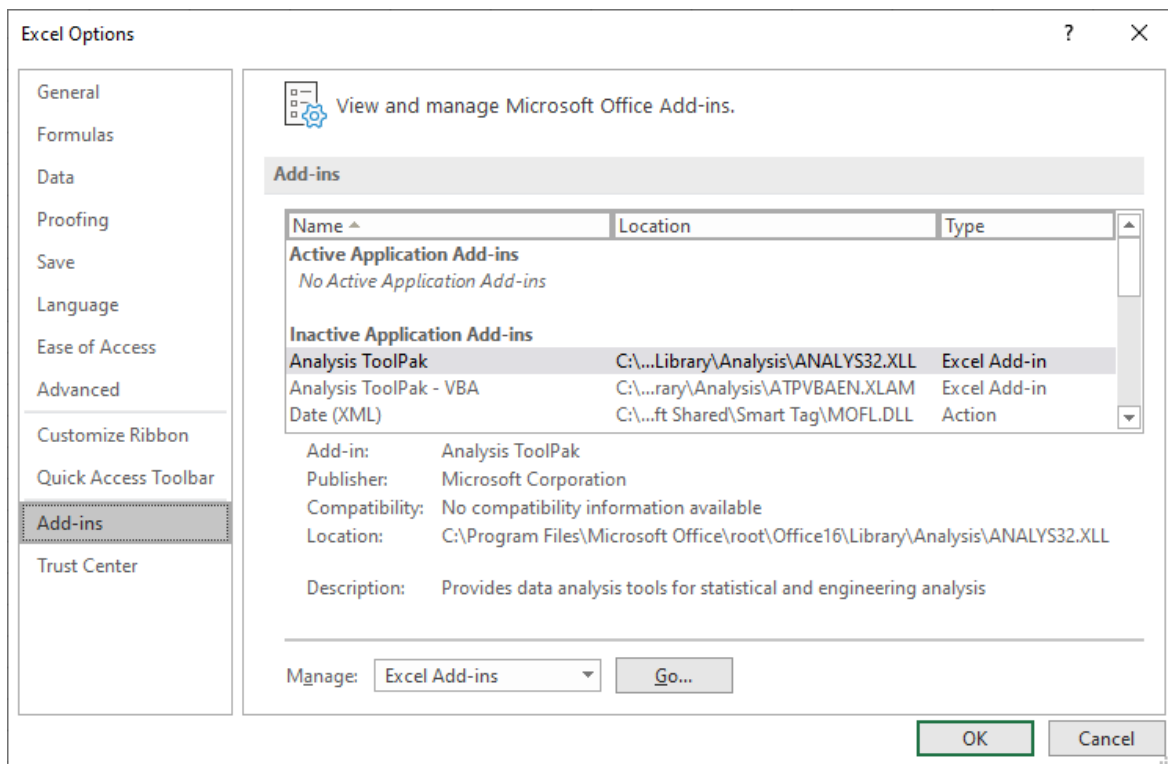
Install the add-in within Excel

Decide on a location which will be accessible at all times, and use File Explorer to move the add-in file to that location. In these instructions the add-in file is located in a newly-created folder named Add-Ins within the Documents folder.

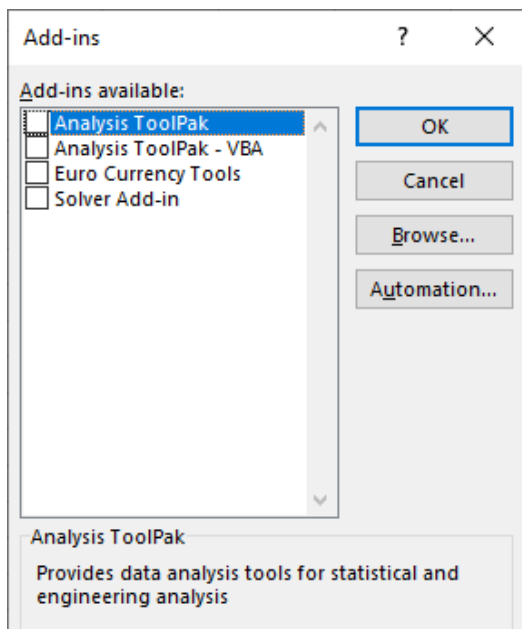
Start Excel, and open a new blank workbook.

From the Excel Ribbon choose File > Options > Add-ins.

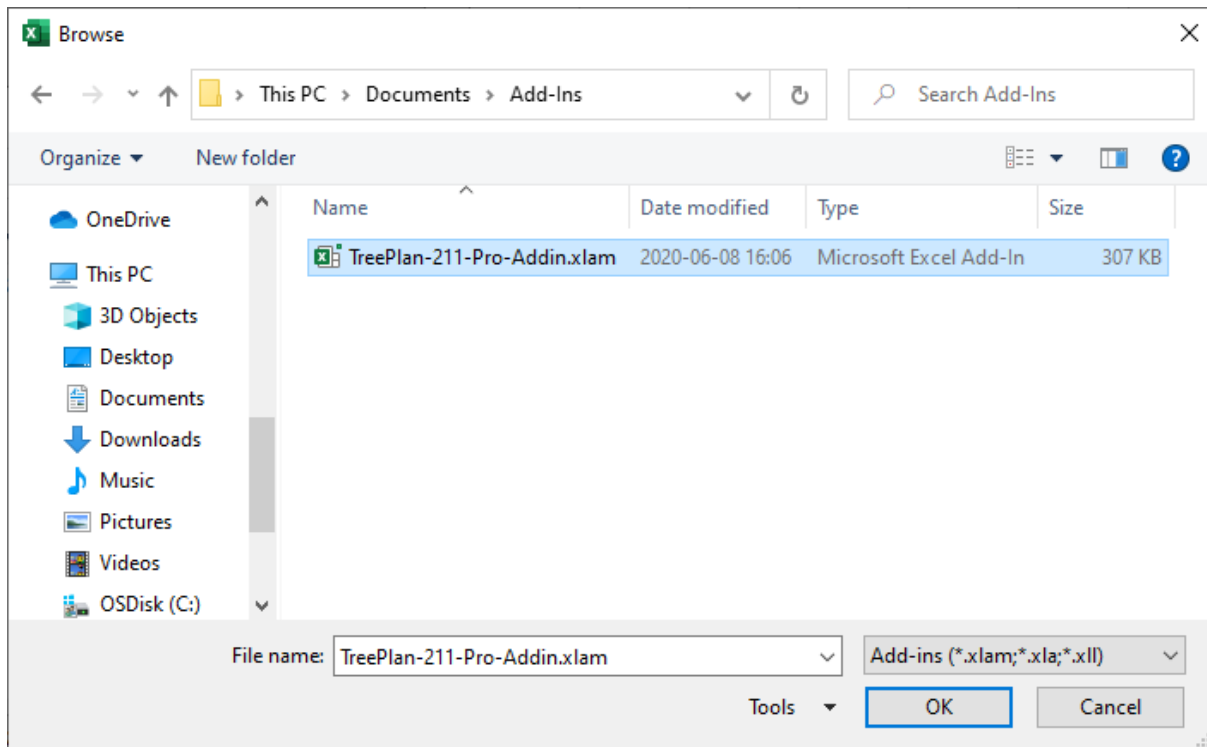
The window will change to show a list of active and inactive add-ins.



At the bottom of this window in the Manage drop-down list, select Excel Add-ins and click the Go... button. The list of current add-ins available appears.

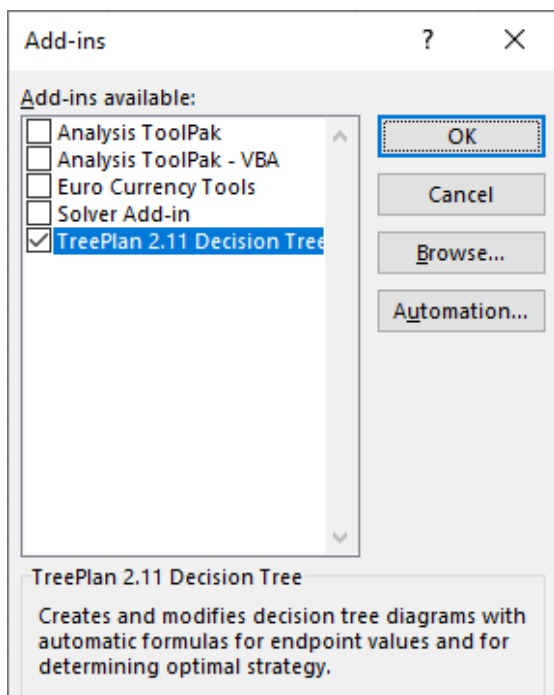


You want to add your add-in to this list. Click the Browse button.



In the Browse window, navigate to the location where you saved the add-in file. Select the file, and click the OK button. The add-in will appear in the list with a tick next to it.

If you want to install more than one add-in, in the Browse window, select the first file, and hold down the Control key while you select the other add-in files.



Click the OK button. The add-in has installed and is now ready for use.

The TreePlan ribbon item will be added to Excel's top menu. Click the TreePlan menu item to see the TreePlan ribbon. The TreePlan ribbon now includes an icon for your add-in. To use your add-in, click your add-in icon on the TreePlan ribbon.

If you have previously opened or installed a TreePlan Software add-in, the TreePlan ribbon already exists, and your add-in icon will be added to the existing ribbon.

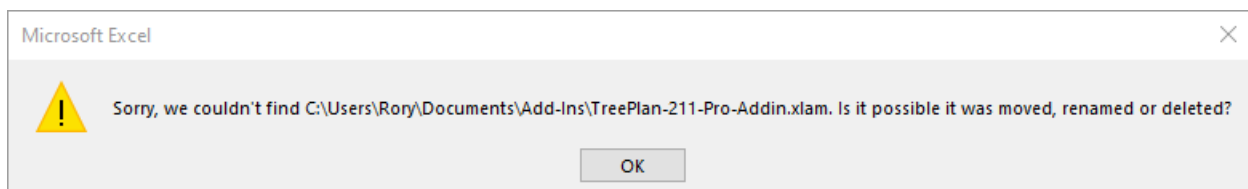
How to uninstall an add-in

If you wish to uninstall your add-in completely, quit Excel.

Use File Explorer to delete, move, or rename the original add-in file.

Start Excel.

If your add-in had a check in the box next to its name when you quit Excel, Excel displays a message window.



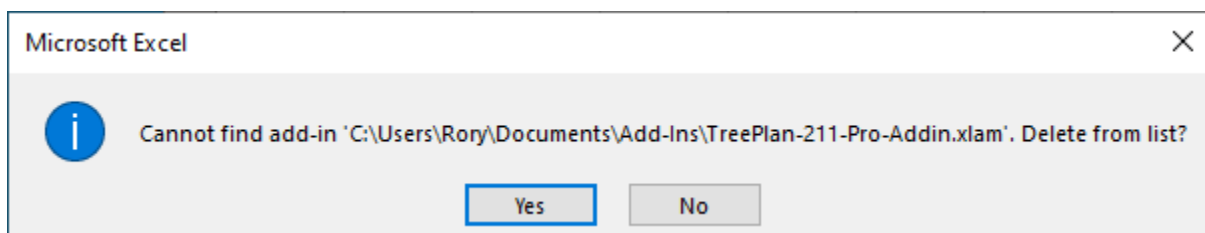
Click the OK button.

If your add-in did not have a check in the box next to its name when you quit Excel, no message window is displayed.

Open a new blank workbook, and choose File > Options > Add-ins > (Manage) Excel Add-ins > Go.

In the "Add-ins available" list, click the box next to the name of your add-in.

If the box had a tic, your click removes the tic. If the box was empty, your click inserts a tic. In either case, a message box appears.



To delete the add-in from the list, click the Yes button. The add-in is uninstalled.

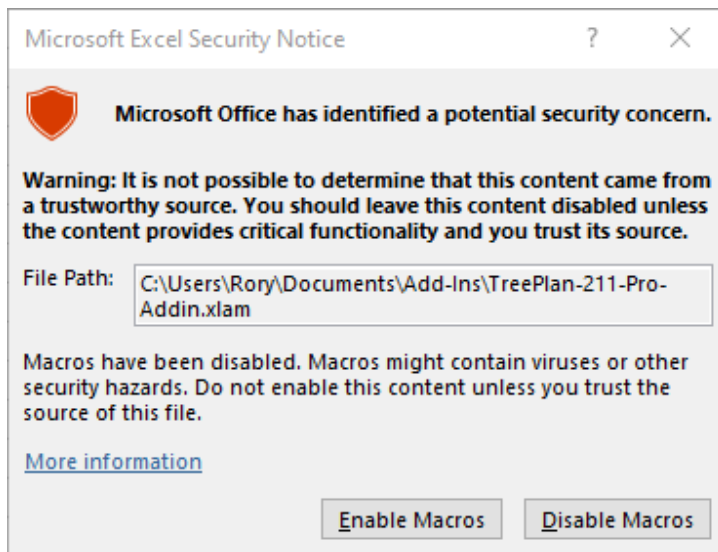
In the Add-ins window, click the OK button to return to the main Excel window.

Open an add-in for each Excel session

Start Excel, and open a blank workbook.

Choose File > Open > Browse, and navigate to the folder containing your add-in file. Select the file, and click the Open button.

The Security Notice window appears.



Click the Enable Macros button.

The TreePlan item will be added to Excel's top menu. To use the add-in, click the TreePlan menu item to see the add-in icon on the TreePlan ribbon.

If you have previously opened or installed a TreePlan Software add-in, the TreePlan ribbon already exists, and the add-in icon will be added to the existing ribbon.

After you quit Excel, the next time you start Excel you will need to use File > Open again to open the add-in file.

Mike Middleton prepared this document during June 2020 using Windows Excel 365 Version 2005 and modified it during September 2022.

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