Excel 2007 and Macro Security

Overview

With Excel 2007 Microsoft has modified its paradigm for protecting the Excel user from outside files (files sent from others) that might contain potentially damaging[1] macro code. The Excel 2007 paradigm is based on a "Trust Center". Simply put, Excel's Trust Center is set to disable the macros in any file-with-macros that you open[2] unless the file contains a valid, current digital signature issued by a known Certificate Authority and is from a source recognized and established by you as a trusted source. The Trust Center's defaults create a highly secure Excel environment that makes it very difficult to open and run any file-with-macros.

The defaults may be very suitable for a corporate setting. An individual user, however, might want a more flexible default arrangement. Excel 2007 provides three options for managing files-with-macros:

1) Change the Trust Center default settings.
2) Set security to "Disable all macros with notification" and if Excel alerts that you're opening a file-with-macro, choose the "Enable" option that displays to override the Trust Center defaults and enable the file's macros.
3) Establish what's called a "trusted location" on your computer and store any Excel files-with-macros from sources that you trust in that location. When opening a file from a trusted location, Excel assumes the file's macros are OK and automatically enables them.

Each of these options is briefly described below. I suggest you choose option 2 or 3. If the "Developer" tab is not already visible on the ribbon in your copy of Excel, see the note at the end of the document.

1) Change the Trust Center default settings

To be able to open *all* macro-containing files without constraint (no matter what their source, whether or not they include a signature, whether or not any signature if present is current, etc.), change Excel's Trust Center defaults. The Trust Center offers several options ranging from extreme protection (*Disable all macros without notification*) to no protection (*Enable all macros*).

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[1] An Excel macro has the potential to contain code that manipulates settings and files on your computer and/or infects your computer with a virus.

[2] The files in this discussion are assumed to be files created by someone other than yourself; that is, files containing macro code sent to you from another individual, downloaded, distributed, etc.

To change Excel's Trust Center defaults, click the "Developer" tab and find the "Code" group. Click the "Macro Security" button". In the "Trust Center" dialog that displays, click "Macro Settings" and choose the setting you want.
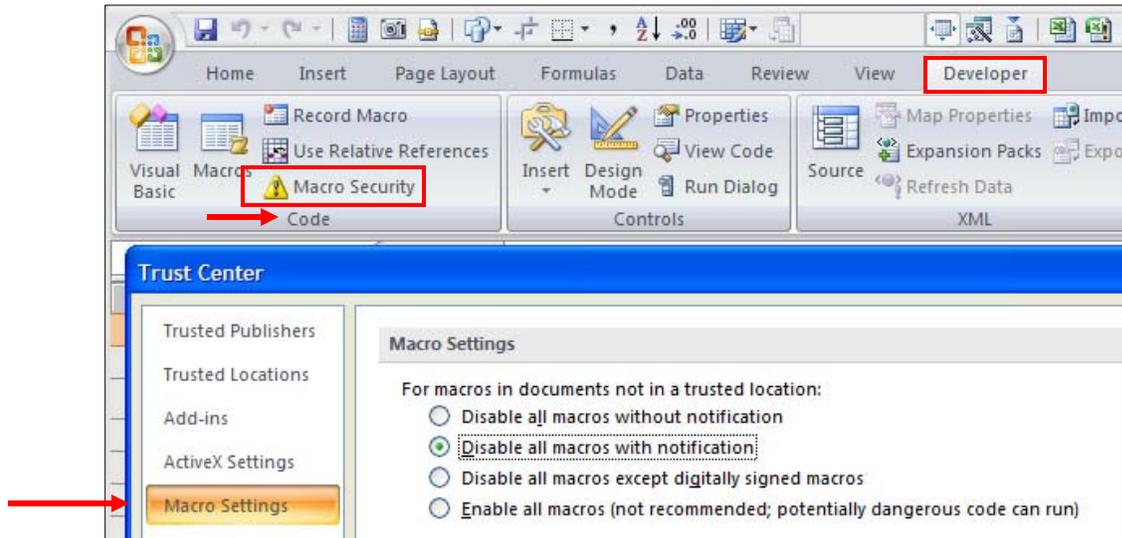
In the illustration above, the new Trust Center setting has been changed to *Disable all macros with notification*. That is, any file from an outside source that contains a macro will have its macros disabled, but Excel will alert you that it's done so.

2) Override the Trust Center Defaults
When you open a file-with-macros that doesn't meet the Trust Center defaults, *if* the Trust Center is set to notify you how it's handling the macros, a Security Warning displays below the ribbon.

Clicking the *Options* button opens the "Microsoft Office Security Options" dialog. The text in the dialog varies depending on which Trust Center default(s) has been violated. From this dialog choose *Enable this content* and then *OK* to enable the macro(s) in the file.

With this method files-with-macros are handled on a case-by-case basis. For this method to work, the Trust Center must be set to display a notification when Excel opens a file that contains macros.

**3) Establish a "Trusted Location" for Any outside Files that Contain Macros**
When confident in the sender of or the source of an Excel file containing macros and the file need not go through the Trust Center's checking process, store the file on your computer in a designated "Trusted Location". Then on file open no special checking will be initiated.

To create a trusted location, click Excel's Office button and select the *Excel Options* button at the bottom of the dialog that opens. In the "Excel Options" dialog choose *Trust Center* and then the *Trust Center Settings…* button. A "Trust Center" dialog opens .
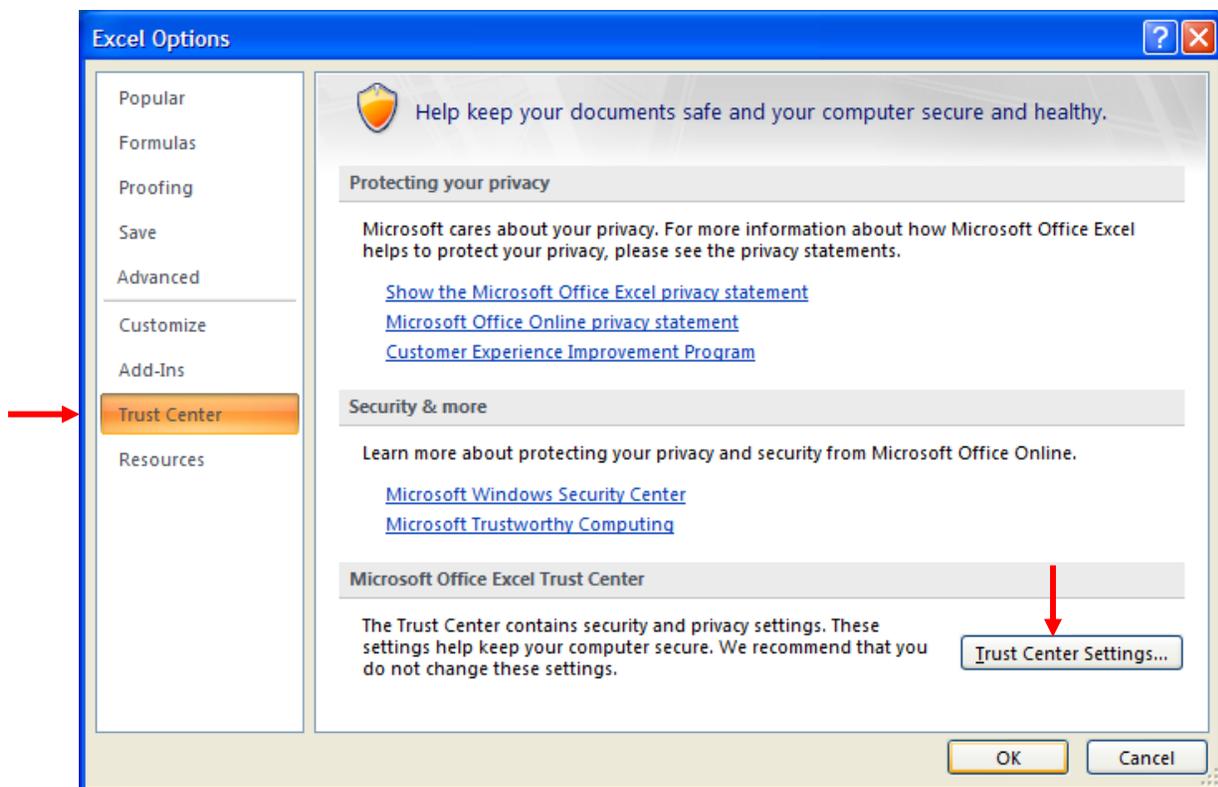

In the "Trust Center" dialog, view the "Trusted Locations" section to see the default trust center locations established in Office. These locations will vary depending on whether your operating system is XP or Vista. Microsoft has designated certain system folders (Templates, Startup) as default Trusted Locations. I recommend that you avoid using these folders for storing files-with-macros since it's very simple to create your own Trusted Location folder(s).

In the "Trust Center" dialog click the *Add new location…* button to open the "Microsoft Office Trusted Location" dialog.
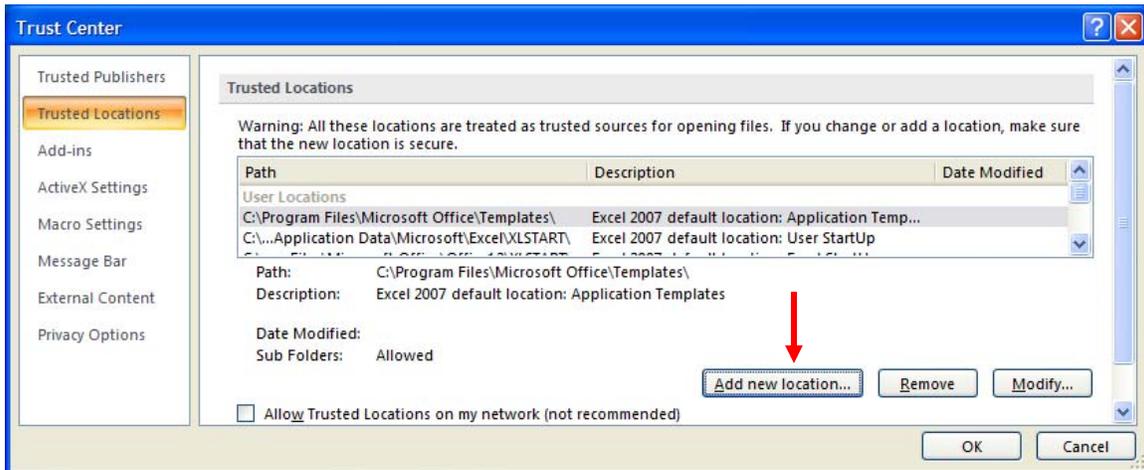
This dialog allows you to establish your own Trusted Location folder(s) and to determine whether or not any subfolders beneath that folder will inherit the parent folder's trustworthiness. In the example below, a subfolder named **Trusted XL Macro Files** located in the **Data** folder on the **C:** drive is established as a Trusted Location folder. The "Subfolders…are also trusted" box is checked. (Note that you can create a folder through this dialog; you need not have created the folder in advance of going through this process.)
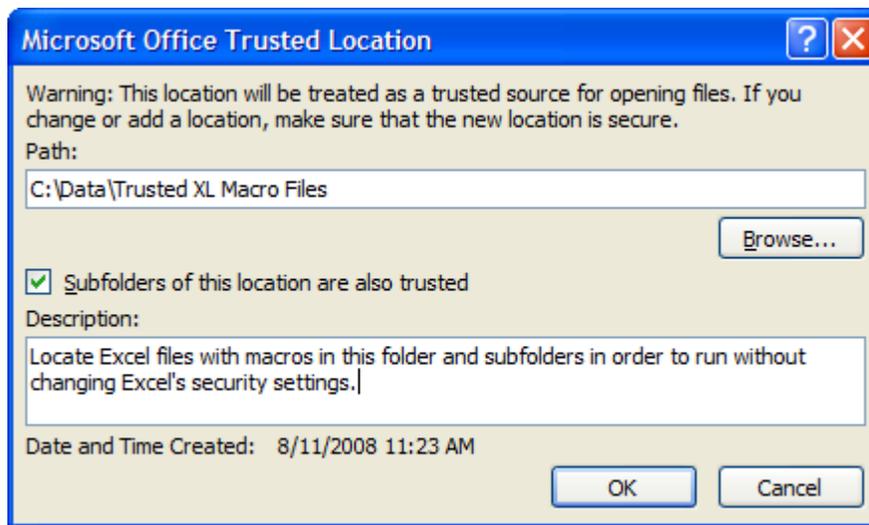

Click the *OK* button three times to close the three dialogs that are open and return to Excel. Any file stored in this folder can be opened without going through the regular Trust Center security check.

How to turn on Excel 2007's Developer Tab
Unlike the other ribbon tabs, Excel's **Developer** tab is not automatically displayed. Microsoft evidently believes that most Excel users won't be delving into macros and VBA.

To turn on the tab so it appears as a regular part of the ribbon, click the Office button and choose *Excel Options* at the bottom of the dialog that displays. The "Excel Options" dialog opens.
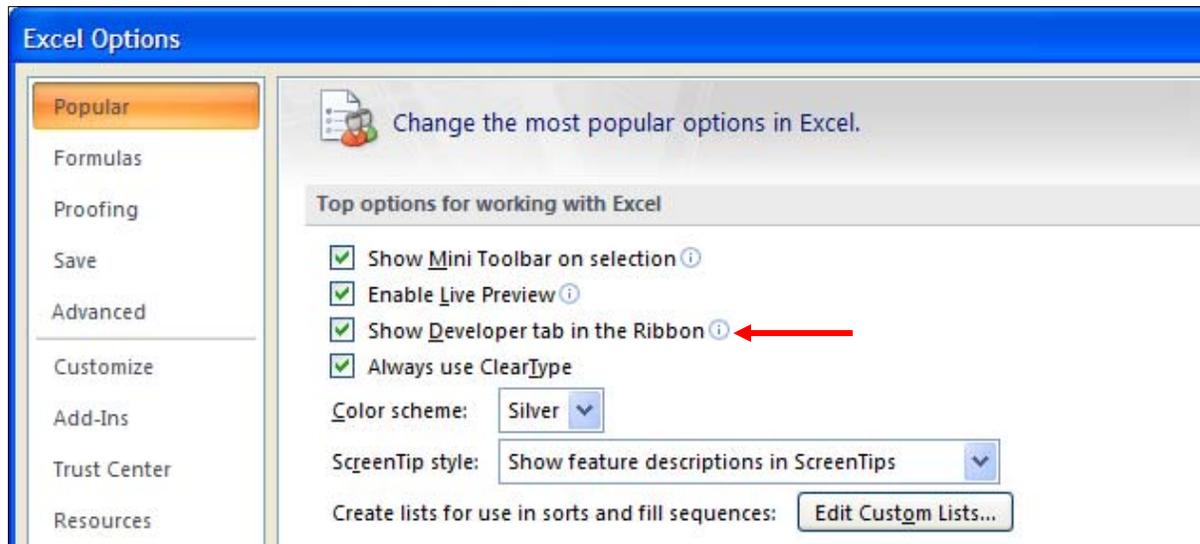
Choose *Popular* from the options at left. On the "Popular" display turn on the check mark for "Show Developer tab in the Ribbon". When you exit the dialog the Developer tab displays in Excel's ribbon. This setting remains "on" until you change it.

In the "Code" group choose the "Macro Security" option.