



## Getting Production Wizard™ Started Using Excel 2007 or 2010

This document covers installing, registering, and starting Production Wizard™ in Excel 2007 or 2010. Please note that Production Wizard™ is registered **after** installing the program. You must contact Owl Software to receive a registration code.

### System Requirements:

A computer running Microsoft® Windows and Microsoft® Excel 2003 or higher is required.

### Installing Production Wizard™

*Note: If the program is already installed please go to the next section, Security Settings.*

1. You must agree to the End User License Agreement to install Production Wizard™.
2. Installing Production Wizard™.
  - a. If you have downloaded Production Wizard™ install file, please follow the instructions provided on the web page to install it.
  - b. If you are installing from a USB drive, please find the Setup.exe file on the USB Drive and double-click it to start the installation. Follow the instructions provided in the install window.

**Notice: When installing Production Wizard™ make sure you do not install the program under the \Program Files folder.**

The *Security Settings* section describes how to set up Excel to allow Production Wizard™ to load all necessary files. The *Starting Production Wizard™* section explains how to start Production Wizard™ after the security settings have been configured.

### Security Settings

For Production Wizard™ to have access to its programming code, Excel macro security must allow the user to enable macros or the user must set the Production Wizard™ subdirectory as a trusted location. This document discusses both methods. To add Production Wizard™ to Excel Trusted Locations go to Section A (below) or to allow the user to enable macros in Excel go to Section B on page 3.

#### **Section A: Security Settings – Adding Production Wizard™ to Trusted Locations**

To add the Production Wizard™ folder to Trusted Locations in Excel do the following:

##### In Excel 2007

1. Start Excel 2007. **Production Wizard™ should not be open.**
2. Click the **Office button** and then click **Excel Options**.

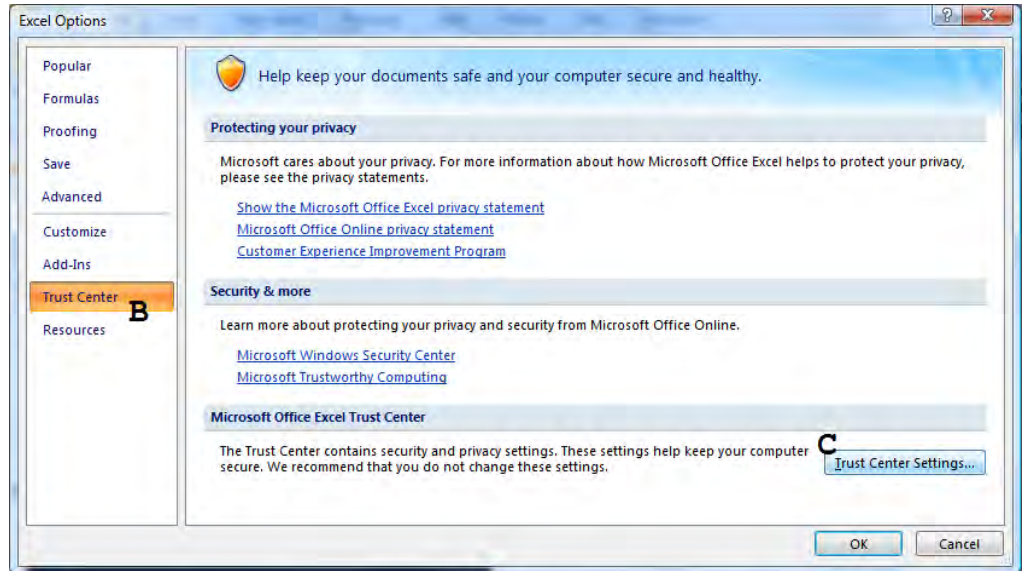
##### In Excel 2010

1. Start Excel 2010. **Production Wizard™ should not be open.**
2. Click the **File tab** and then click the **Options**.

The rest of the instructions in this section are the same for either Excel 2007 or Excel 2010.

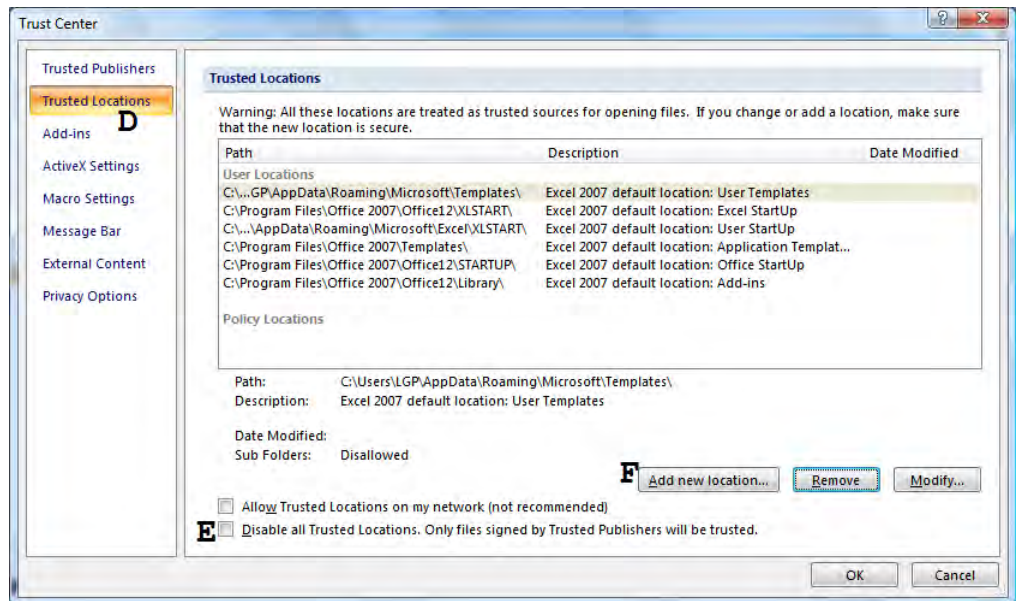
The Excel Options Window appears.

3. Click **Trust Center** on the left (B) then press the **Trust Center Settings** button (C).



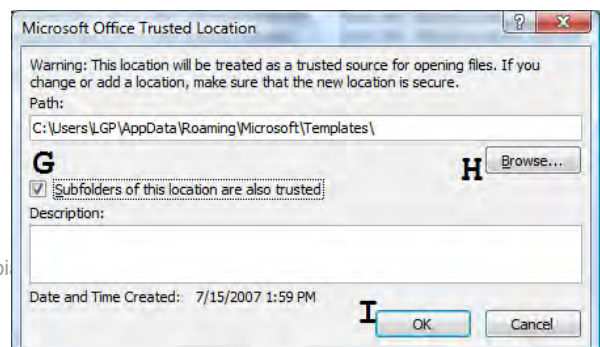
The Trust Center window appears.

4. Click **Trusted Locations** on the left (D). Make sure **Disable all Trusted Locations** is not checked (E). Press the **Add new location** button (F).

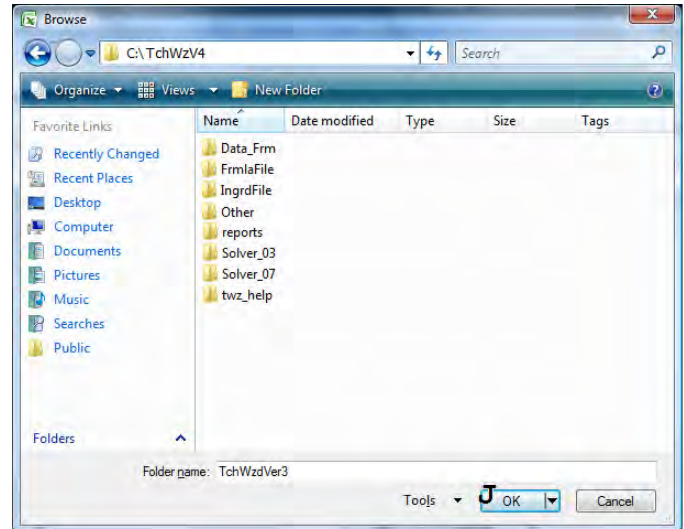


The Microsoft Office Trusted Location window appears.

5. Make sure **Subfolders of this location are also trusted** is checked (G). Click the **Browse** button (H). The Browse window appears. Locate the folder \PrdWizV2. Press the **OK** button in the **Browse** window (J in figure below). Press the **OK** button in the Microsoft Office Trusted Location window (I).



6. Click the **OK** button as needed to close the various windows.
7. Exit Excel.
8. You are ready to start Production Wizard™. Please refer to *Starting Production Wizard™ with Excel Security Settings Configured for a Trusted Location* on page 5.



## **Section B: Security Settings – Allowing the User to Enable Macros**

If you just completed the instructions in, *Section A: Security Settings – Adding Production Wizard™ to Trusted Locations* then you can skip this section. To set Excel security settings to allow the user to enable macros when starting Production Wizard™ do the following:

### In Excel 2007

1. Start Excel 2007. **Production Wizard™ should not be open.**
2. Click the **Office** button and then click **Excel Options**.

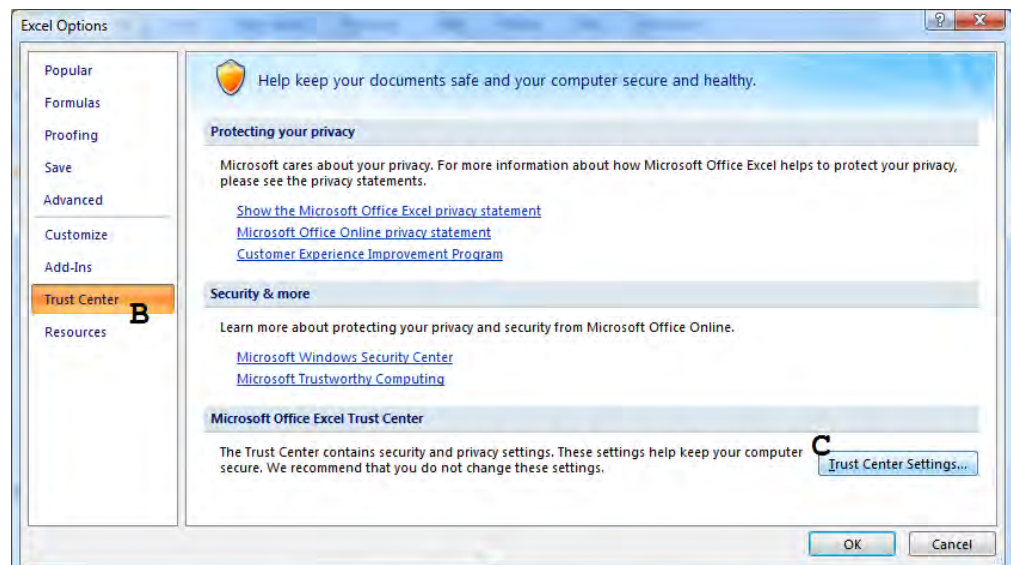
### In Excel 2010

1. Start Excel 2010. **Production Wizard™ should not be open.**
2. Click the **File** tab and then click **Options**.

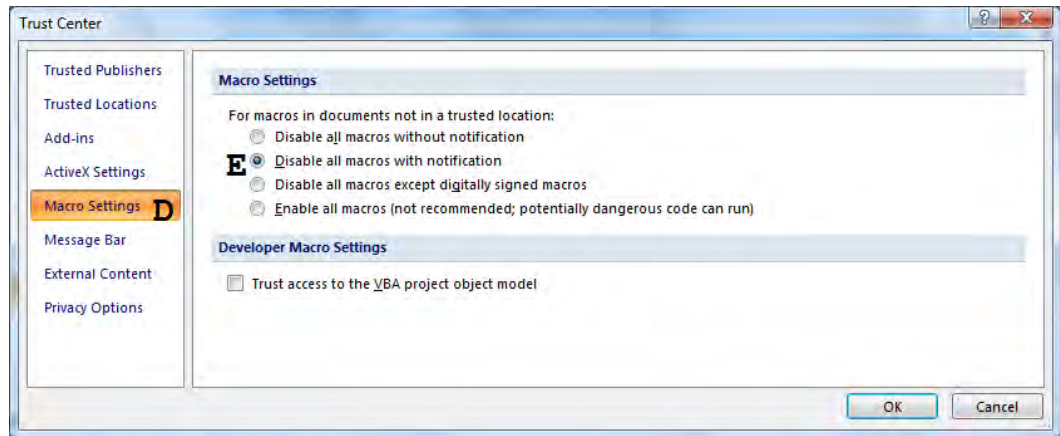
The rest of the instructions in this section are the same for either Excel 2007 or Excel 2010.

The Excel Options Window appears.

3. Click **Trust Center** on the left (**B**) then press the **Trust Center Settings** button (**C**).



The Trust Center window appears.



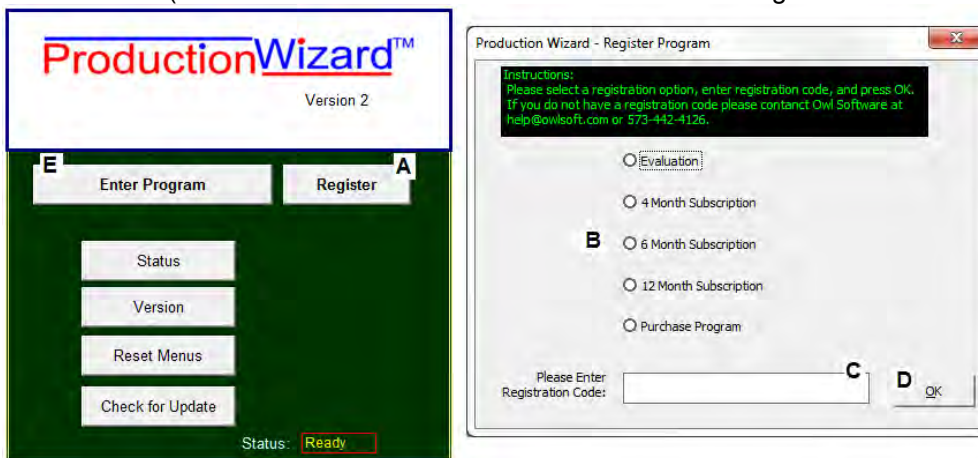
4. Click **Macro Settings** on the left (**D**).
5. Select the option **Disable all macros with notification** (**E**).
6. Press the **OK** button as needed to close the various windows.
7. Exit Excel.
8. You are ready to start Production Wizard™. Please refer to *Starting Production Wizard™ with Excel Security Settings Configured to Enable Macros* on page 6.

## Starting Production Wizard™

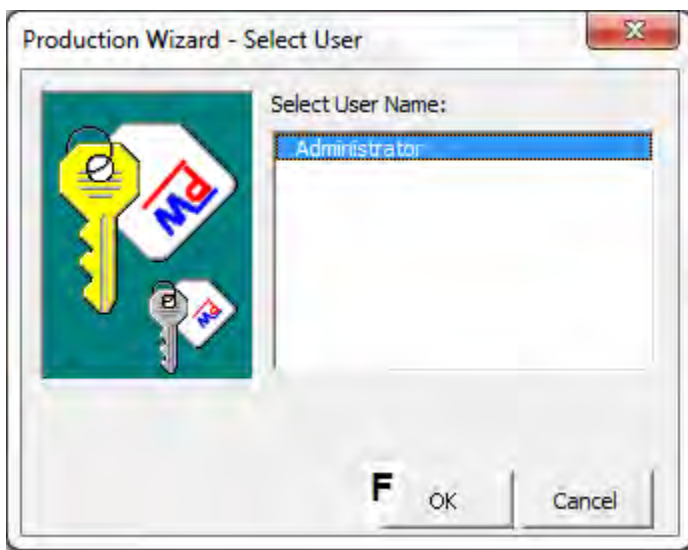
### A. Starting Production Wizard™ with Excel Security Settings Configured for Trusted Location

To use Production Wizard™ you must make sure the Excel security settings are properly set (see *Security Settings* on page 1 if you have not already done so).

1. Find the Production Wizard™ shortcut and click it to start Production Wizard™.
2. The Production Wizard™ Front Panel will appear (see figure below). Press the **Register** button (A).
3. The Register Program window appears (see figure below). Select the **registration option** (B), enter the **registration code** in the space provided (C) and press the **OK** button (D). If you do not have a registration code, please contact Owl Software (call 573-442-4126 9 AM – 5 PM Central time on regular business days or e-mail [help@owlsoft.com](mailto:help@owlsoft.com)).



4. If you successfully registered Production Wizard™, press the **Enter Program** button (E in figure above) to enter Production Wizard™. When the **Select User** window appears, click the **OK** button (F in figure below). This will put you in the Formula Development section of Production Wizard™.



5. Contact Owl Software (call 573-442-4126 9 AM – 5 PM Central time on regular business days or e-mail [help@owlsoft.com](mailto:help@owlsoft.com)) if you have any questions.

### **B. Starting Production Wizard™ with Excel Security Settings Configured to Enable Macros**

To use Production Wizard™ you must make sure the Excel security settings are properly set (see *Security Settings* if you have not already done so).

1. Find the Production Wizard™ shortcut and click it to start Production Wizard™.
2. The Production Wizard™ start up window appears in Excel along with a security warning. Click on the **Options** button (A in figure below right).

The Microsoft Security Options window appears.

3. Select the **Enable this content** option (B in figure below left) and Click **OK** (C).



4. For the rest of the instructions please refer to step 2 in *Starting Production Wizard™ with Excel Security Settings Configured for Trusted Location* on the previous page.