

GAP ANALYSIS TOOL QUICK SETUP GUIDE

This document provides a quick guide to setting up and getting started using the Gap Analysis Tool Excel Workbook. Because the Gap Analysis Tool is a VBA-driven Microsoft Excel workbook, there are a number of setup steps that must be completed within Excel to allow the tool to run properly. This “Quick Setup Guide” provides 1) a quick reference to these setup steps, and 2) troubleshooting information if the Gap Analysis tool finds improper Excel settings still exist when trying to run the tool.

Before any setup steps are completed, it is worth noting that version 1.0 of the Gap Analysis Tool has been specifically developed for (and tested in) versions 2007 and 2010 of Microsoft Excel. Therefore, there is no guarantee that these tools will run bug free within older or newer versions of Excel.

Getting Started

Complete the following initial setup steps to get started using the Gap Analysis Tool.

Step 1. Copy Needed Files to Your Computer

The Gap Analysis Tool is delivered as a stand-alone Excel workbook titled “GapAnalysisTool_v1.00.xlsm.” To get started using the tool, the first step is to copy the file to a chosen location on your computer. The instructions for completing this task are as follows:

1. Open Windows Explorer.
2. Create a folder/directory in which you want to store the Gap Analysis Tool workbook.
3. Copy the “GapAnalysisTool_v1.00.xlsm” file to your computer.

After you have copied the Gap Analysis Tool workbook to your computer, complete the additional setup steps below before trying to run the tool.

Step 2. Set Microsoft Excel Trust Center Settings

For security reasons, in Excel 2007 (and later versions of Microsoft Excel) you must set the Excel “Trust Center” settings to allow needed VBA code to execute on your computer. The instructions for making those needed setting changes are the following:

1. In Excel 2007, click the Office  button at the top left of the Excel window. In Excel 2010, click on the “File” tab.
2. In Excel 2007, click the “Excel Options” button to open the *Excel Options* dialog box. In Excel 2010, click “Options.”
3. Select “Trust Center” in the list of options on the left-hand side of the *Excel Options* dialog box.
4. Click the “Trust Center Settings” button to open the *Trust Center* dialog box.
5. Set the “Trust Center” settings in the *Trust Center* dialog box to those shown in figure 1.

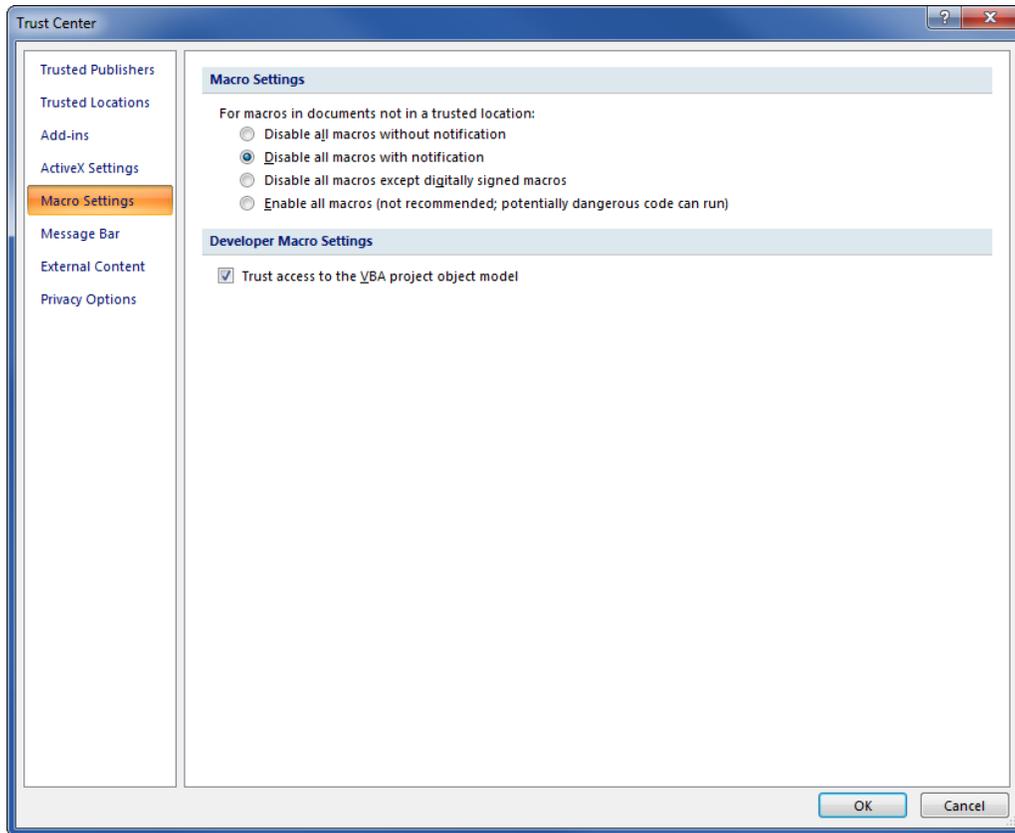


Figure 1. Example Excel Trust Center settings.

Step 3. Run the Tool and Enable Macros

Because the Gap Analysis Tool is a VBA-driven (i.e., macro-driven) Excel workbook, macros must be “enabled” for the workbook to open and run correctly. If you set your macro security settings in the Excel “Trust Center” to the recommended choice of “Disable all macros with notification” (see figure 1), you will need to use the following steps to open the Gap Analysis Tool workbook:

1. Double click the “GapAnalysisTool_v1.0.xlsm” file in the “Gap Analysis Tool 1.0” folder that was copied to your computer.
2. If the macro security settings are set to “Disable all macros with notification” upon opening the workbook, a security warning will be displayed near the top of your Excel window similar (see figure 2). Click the “Options” button next to the security warning message to open the *Microsoft Office Security Options* dialog shown in figure 3.
3. Select the “Enable this content” option in the *Microsoft Office Security Options* dialog box and click the “OK” button to open the Gap Analysis Tool workbook.

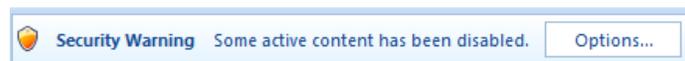


Figure 2. Excel security warning that is displayed when macros have not been enabled.



Figure 3. Setting macro security in the *Microsoft Office Security Options* dialog box.

Completing these steps should open the Gap Analysis Tool and display the main home form of the tool. If you instead receive a pop-up error message window asking you to refer to the “Initial Setup’ portion” of the User’s Guide, that indicates that the Gap Analysis Tool has found that the Excel settings are still not as needed. If you encounter such an error message, please refer to the troubleshooting section below for more specific help.

Troubleshooting

“Excel Macro Settings Not Properly Configured” Error Dialog

When the Gap Analysis Tool is opened, it checks that the “Trust Center” settings are set as needed. If the Gap Analysis Tool finds that the settings are not as needed, the warning message shown in figure 4 is displayed, and the workbook is automatically closed. To fix this issue, complete the “Step 2. Set Microsoft Excel Trust Center Settings” instructions in the “Getting Started” section above.

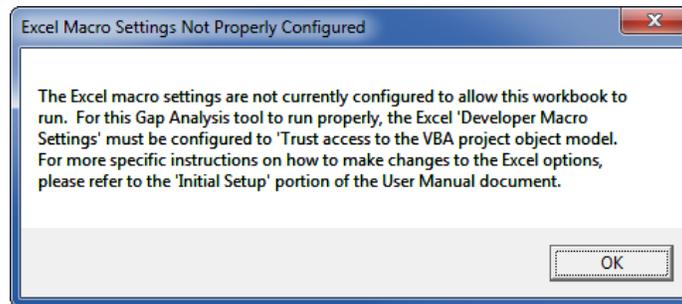


Figure 4. Warning message that is displayed when Excel “Trust Center” settings are not configured as needed.

“Missing Reference” Error Dialog

The VBA-code used in the Gap Analysis Tool is also dependent on five specific VBA “References” (or code object library files). Details of the five required reference files are:

Name: Visual Basic For Applications

Filename: VBE6.DLL

Name: OLE Automation

Filename: stdole2.tlb

Name: Microsoft Office 12.0 Object Library

Filename: MSO.DLL

Name: Microsoft Forms 2.0 Object Library

Filename: FM20.DLL

Name: Microsoft Windows Common Controls 6.0 (SP6)

Filename: MSCOMCTL.OCX

Each of these five reference files contains information and instructions that are required by Excel to make the Gap Analysis Tool run as designed. While the majority of these reference files are most likely on your computer (as they are common controls often packaged with Microsoft Office), there is no guarantee that that is the case. Therefore, when the Gap Analysis Tool workbook is opened, code runs that checks your computer to make sure that each needed reference file is available. If one of the needed files is missing, a warning message similar to the one shown in figure 5 will be displayed, and the Gap Analysis Tool workbook will be closed.

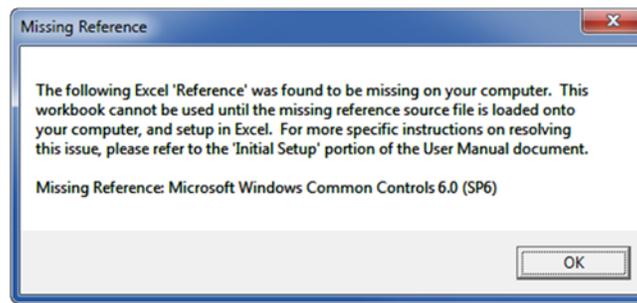


Figure 5. Example warning message that is displayed when a needed Excel reference is missing.

If you receive a “Missing Reference” warning, use the following procedure to add the needed reference to the Excel Reference List:

1. Make note of the name of the missing reference displayed in the warning message (e.g., “*Missing Reference: Microsoft Windows Common Controls 6.0 (SP6)*”).
2. Look in the list of required references described previously in this section, and determine the name of the file associated with the missing reference.
3. Locate the missing file (identified in step 2), in the “Reference Files” provided with the Gap Analysis Tool.
4. If desired, copy the missing reference file to a location under the C:\Windows directory. Note: this step is not required; however, most needed Excel reference files are typically stored somewhere within the C:\Windows directory.
5. Open the Excel application without opening a workbook.
6. Click the “Developer” tab and click the “Visual Basic” button to open the *Visual Basic Editor* window. Note: the *Visual Basic Editor* may also be opened by using the ALT+F11 key combination at any time when Excel is opened.
7. Click on the *Visual Basic Editor*’s “Tools” menu and select “References” to open the *References – VBAProject* dialog box.
8. Click the “Browse” button to open the *Add Reference* dialog box.
9. Use the provided controls to browse to the location of the needed reference file.
10. Select the needed file and click the “Open” button to add it to Excel’s list of “Available References.”
11. Close the *Visual Basic Editor* window.