

Quick Reference – Excel 2007 Security for ESOPT Pivot Tables

Setup Excel Security for Pivot table updates


Problem:

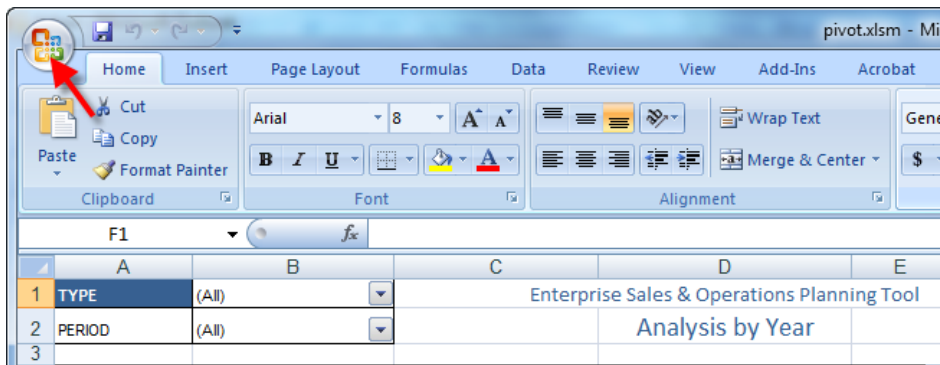
When the Pivot Tables are opened from ESOPT, you may experience multiple security warnings or you do not see the confirmation message indicating that the pivot table has been refreshed.

Resolution:

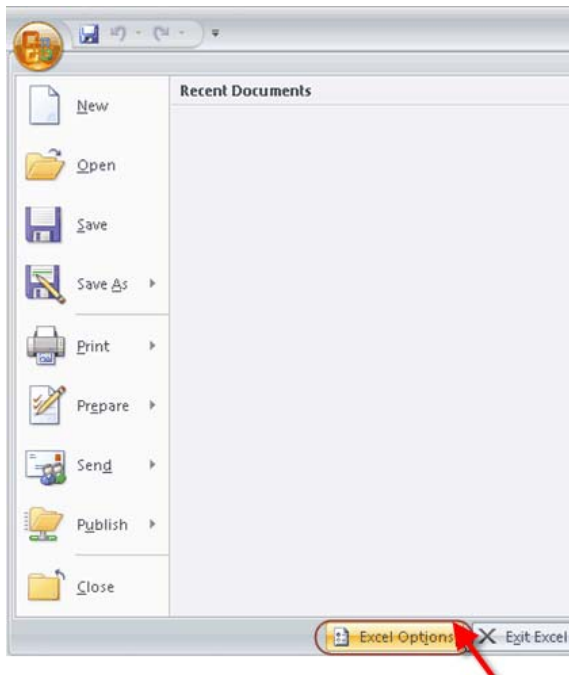
Add the folder where the Pivot tables reside to Excel **Trusted Locations**.

To create a trusted location:

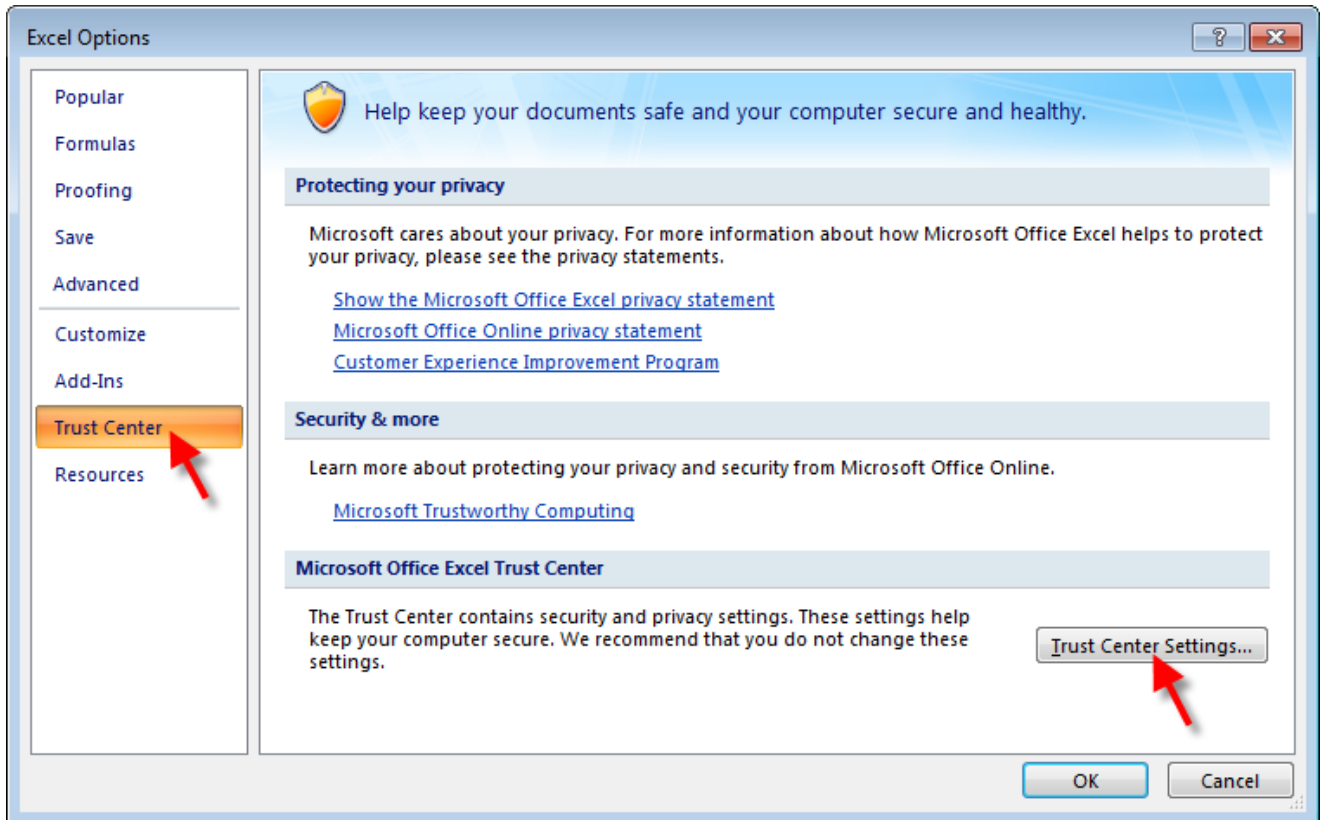
1. Open Microsoft Excel or one of the pivot tables.
2. Click Excel's **Office button** 



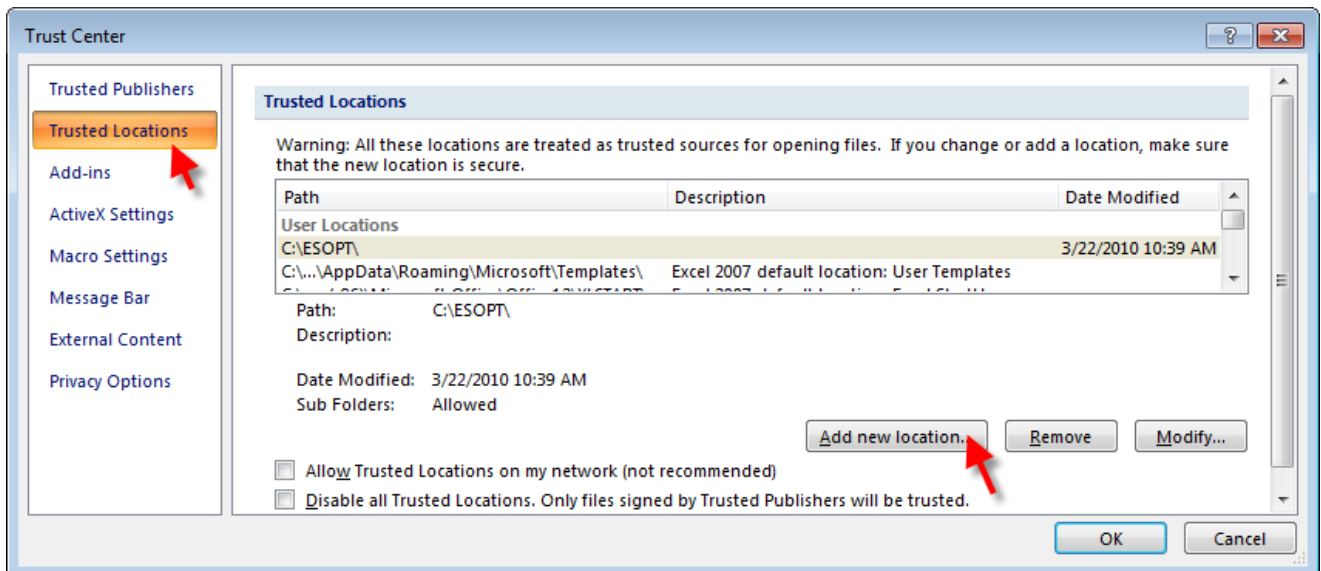
3. Click the **Excel Options** button.



4. In the "Excel Options" dialog choose **Trust Center** and then the **Trust Center Settings...** button. A "Trust Center" dialog box opens.



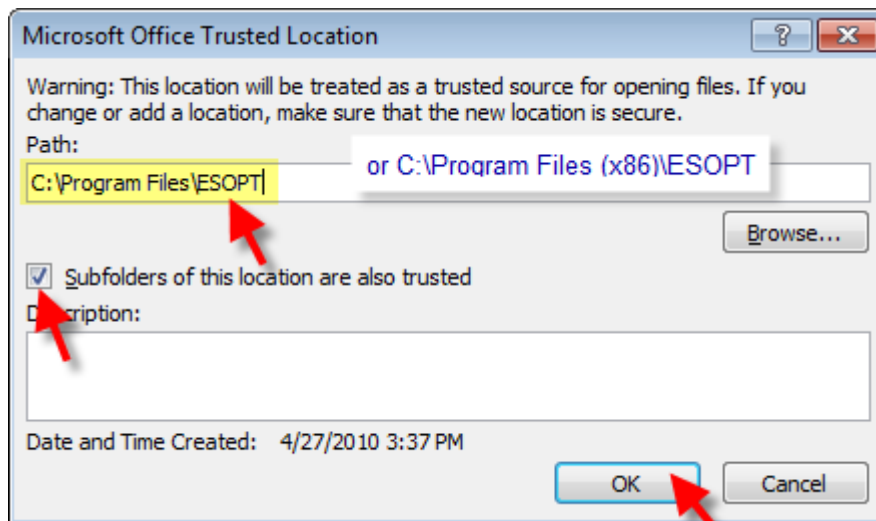
5. In the "Trust Center" dialog, click "Trusted Locations" then click the **Add new location...** button.



6. Type the folder name or click the **Browse** button to locate the ESOPT Folder or ESOPT User folder if it is not in the program files folder. (i.e. **C:\Program Files\ESOPT** or D:\ESOPTData\User)



7. Check the box labeled '**Subfolders of this location are also trusted**'.



8. Click the **OK** button three times to close the three dialogs that are open and return to Excel.
9. Close Excel and open the Pivot table.