

## Configuring Microsoft Excel Security Settings in DNA Developed Toolkits

### Applicable to DNA Applications:

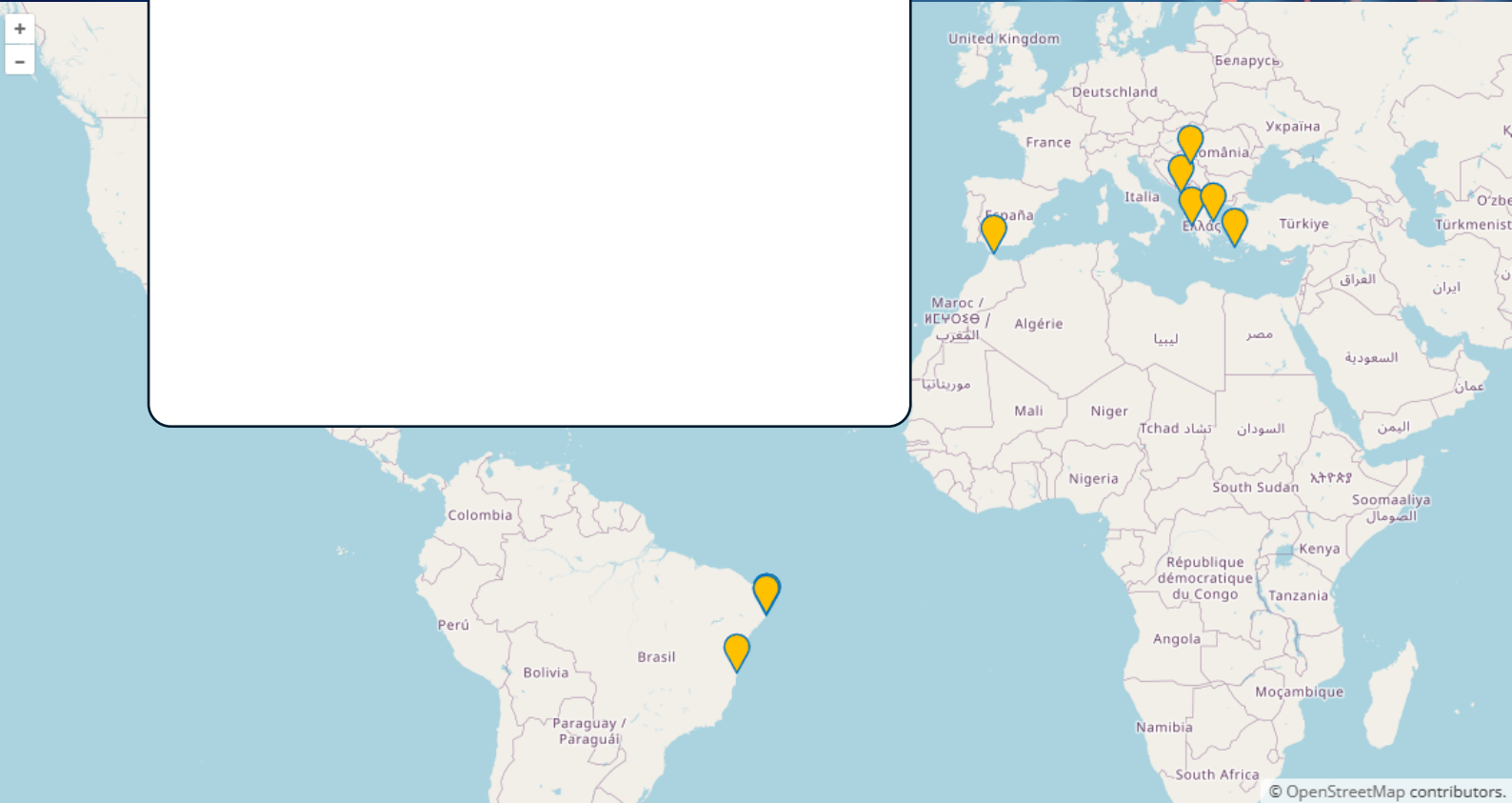
GIZ WFD Data Upload Module

UN-Habitat WaCT Toolkit DCA

World Bank PLAST Toolkit

DNA Control Levels Tool

May 12<sup>th</sup> 2025.



In order to use DNA developed Microsoft Excel Applications it is necessary to correctly configure Microsoft Excel security to allow the Visual Basic Application and associated macros to run. Microsoft office applications are regularly subject to changes in the security regime making it increasingly difficult to deliver applications that utilise the Microsoft Office Visual Basic for Applications (VBA) programming language.

## Microsoft Windows – Recommended Procedure

### Step 1. Ensure the Excel file is in a local folder

Make sure the Excel file containing the DNA Application is moved to a “local” folder on your computer, we do not recommend the “My Documents” folder if it is designated as a “Trusted Location” (see page 8). If it is in your downloads folder move it into another local folder. Do not try to open it from a network folder.

### Step 2. “Unblock” the file if necessary

Recent changes to Windows and Microsoft Office security “Block” macros and VBA applications automatically when Microsoft Office files are downloaded from the internet, or are moved/copied from a network folder, or are moved/copied from another computer.

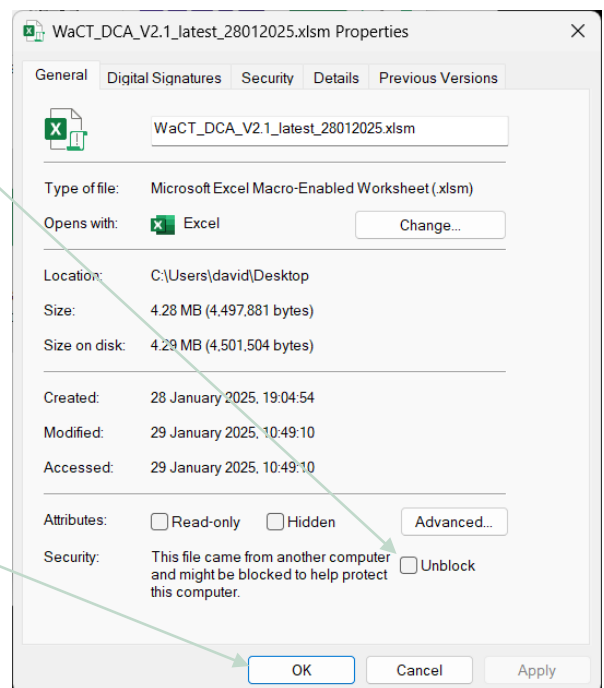
Right click on the file in Windows File Explorer and choose the option “Properties” in the pop-up menu.

The “Properties” dialogue screen will appear:

At the bottom of the pop-up dialogue you may see a “Security” section with the option “Unblock”, click the box to unblock the macros.

Click the **OK** button, and save the file again and close Excel.

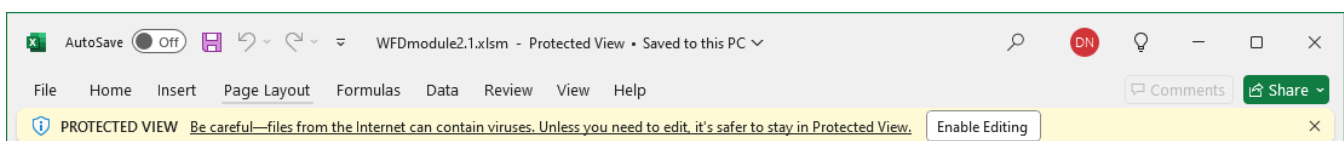
If you don’t see the “Security” section with the Unblock checkbox then the file has not been automatically blocked.



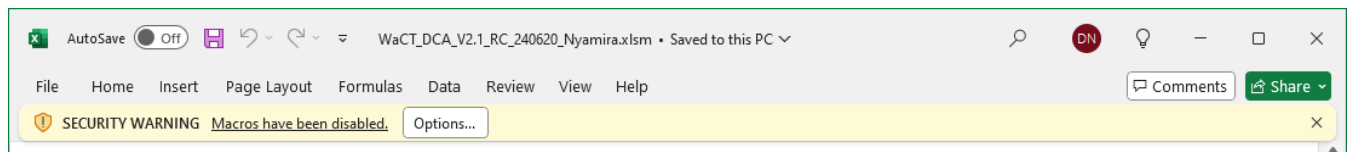
### Step 3. Open the file

Open the Excel application file.

If you see a message saying the file has been opened in “PROTECTED VIEW” mode. Then the file has not been Unblocked (See Step 2).



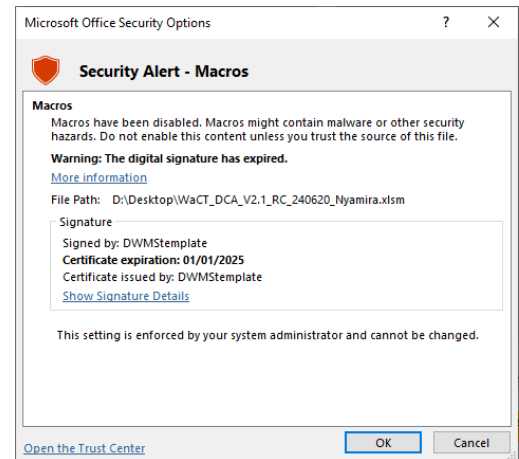
If you see a message saying “Macros have been disabled”:



Click the “Options...” button for more information.

If you see the Security Alert – Macros pop up window saying the digital signature has expired then you need to request / download the latest version.

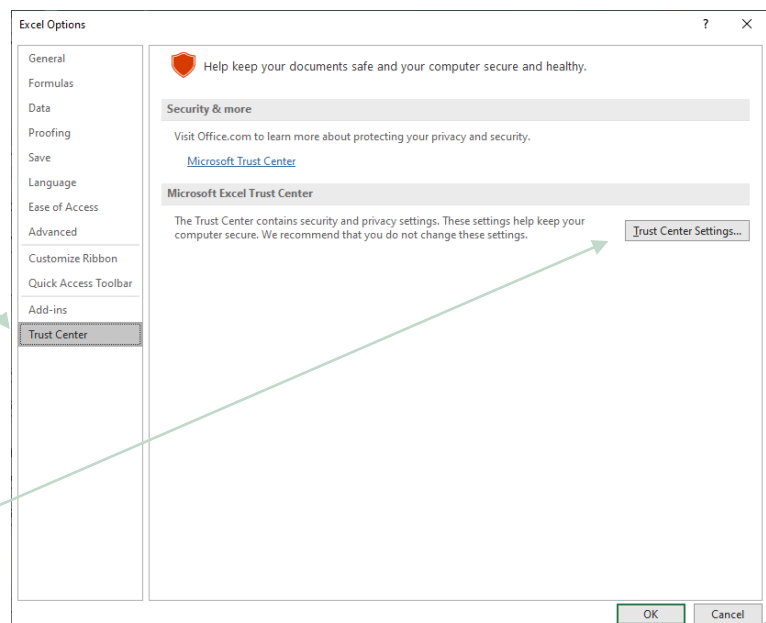
If the spreadsheet has data in it, the data can be imported into the new WaCT DCA.



#### Step 4. Configure settings in the ‘Trust Center’

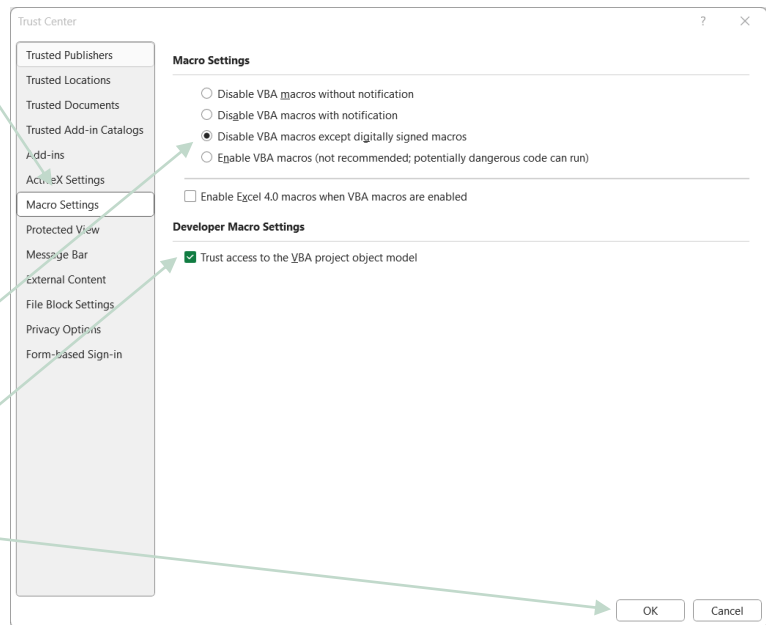
The ‘Trust Center’ settings control what content you are able to open within Microsoft Excel, for example Macros. We recommend users change their macro settings to ‘Disable VBA macros except digitally signed macros’ and check ‘Trust access to the VBA project object model’. These settings ensure users are opening a version of the toolkit that is unmodified from the official release. To change these settings, follow the steps below:

**1.1:** With the DNA Application open click on **File** in the Excel main menu, then **Options** and click **Trust Centre** menu option. You should see a screen similar to that shown on the right:



**1.2:** Click the **Trust Center Settings..** button in the main window you should then see the following screen:

Select the menu option **Macro Settings**.



Ensure the option “Disable VBA macros except digitally signed macros”, is selected and tick the box “Trust access to the VBA project object model”.

Click **OK** button to save settings and exit back to the Excel program. Close Excel and re-open the workbook.

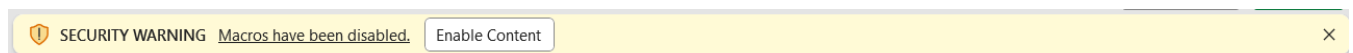
If the Trust Centre already had the correct settings, you can omit steps 5 and 6.

### Step 5. Save the file

Save the file back to your local folder.

### Step 6. Re-open DNA APPLICATION

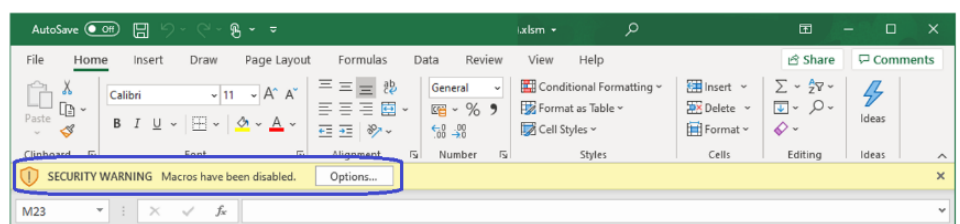
Reopen the application, it may open without any error messages or may, depending on the Microsoft Office Version installed display the “Macros have been disabled” message:



Click the “Enable Content” button.

Or you may see a message like:

If you get the message with the “Options” button you may be able to install the “Digital Certificate”.



### Step 7. Install the David Newby Associates ‘Digital certificate’.

A digital certificate is a security feature added to VBA projects to verify that they are safe. It is recommended that users install the digital certificate prior to trying to run DNA APPLICATION to show that they trust it. Although Step 2 can be completed by opening a new Excel workbook, the following steps should be done when opening the DNA APPLICATION workbook.

Note that on your version of Microsoft Office / Excel, you may not be give the choice of installing the certificate. If not jump to step 8.

Please follow the steps below to install the certificate.

**7.1:** The dialog box that opens shows the certificate details that the spreadsheet model is digitally signed with.

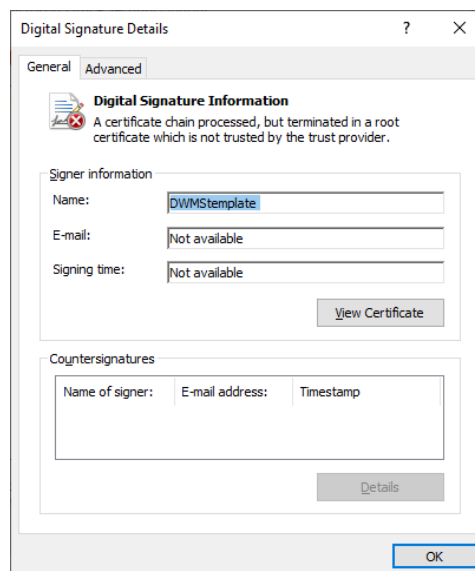
Click on “Show Signature Details”

**Note: from 16/03/2025 the “DWMStemplate” signature is replaced by a new “David Newby Associates” signature.**

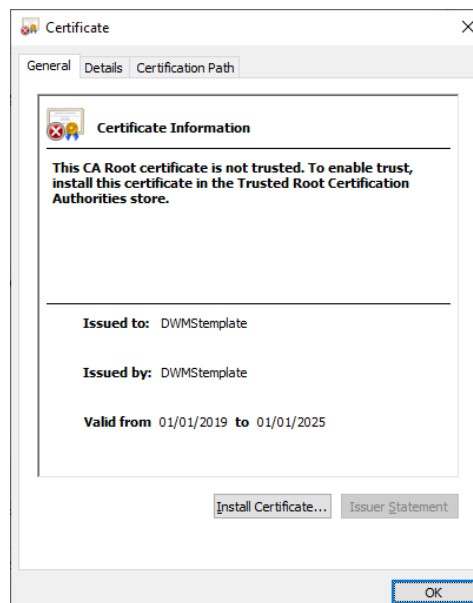


**7.2:** A further “Digital Signature Details” dialog opens:

Click on the View Certificate... button:

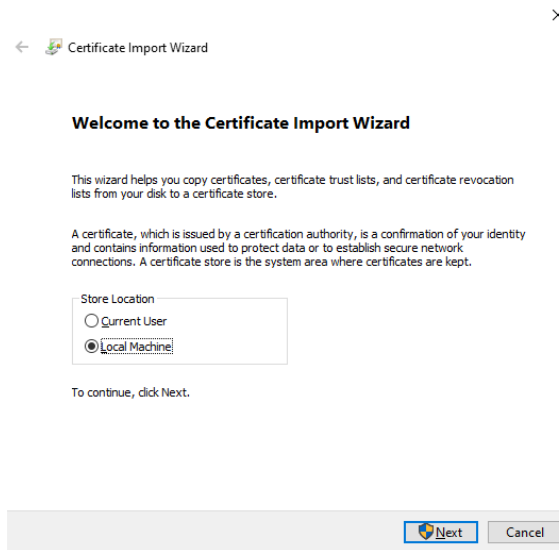


**7.3:** Now click on Install Certificate... and the next dialogue box opens:



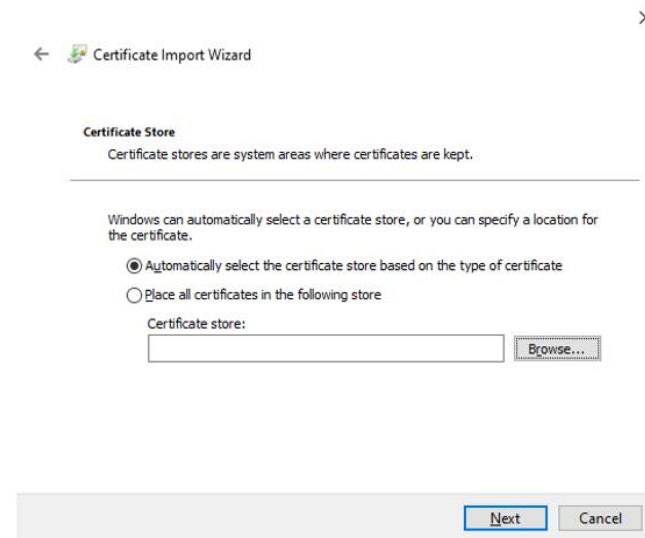
**7.4:** Choose store location  
 “Local Machine” and click Next  
 button:

If storing to the “Local Machine”  
 is disabled, the certificate can  
 be stored on the “Current User”  
 instead, however, others users  
 of the PC will also have to install  
 the certificate if they wish to  
 run DNA APPLICATION.

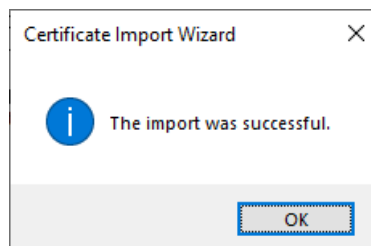


**7.5:** Now we choose where to  
 save the certificate. Leave the  
 choice to Windows.

Click the “Next” button and  
 then click the “Finished” button  
 on the next popup.

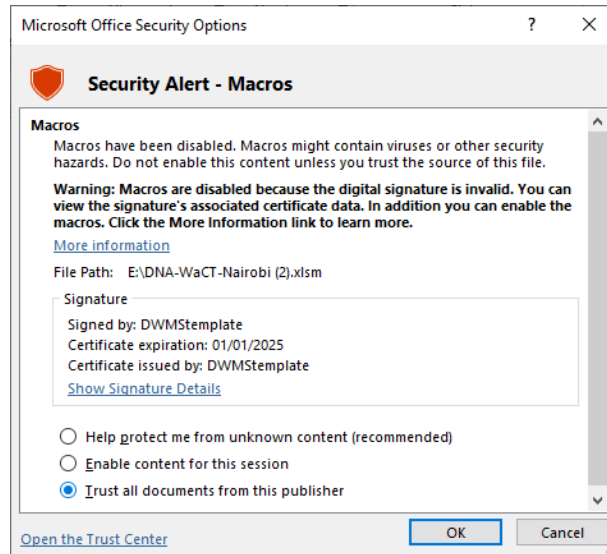


**7.6:** You will get a confirmation.  
 Click OK .



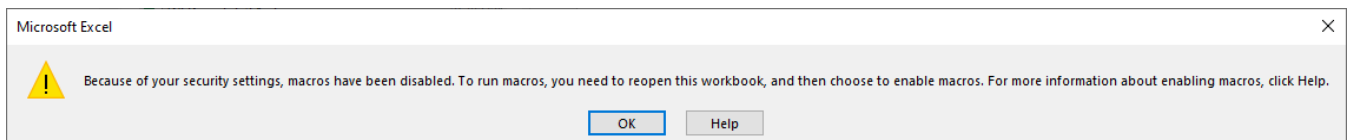
**7.7:** Select the option “Trust all documents from this publisher” and click OK .

Close Excel and reopen the DNA APPLICATION spreadsheet application and the system should be fully functional.



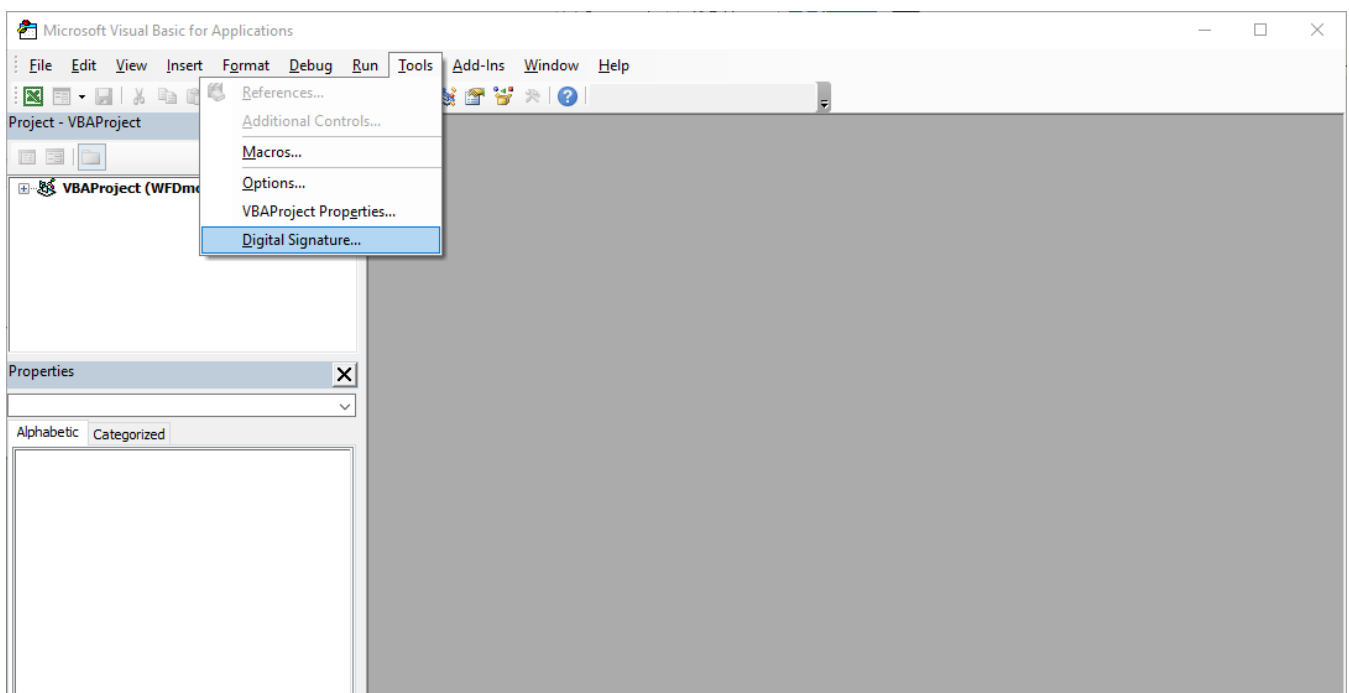
### Step 8. Save, close, and then re-open DNA APPLICATION

The file should open without any further warning messages, however, if the VBA application was not digitally signed, the application may fail with the following message:

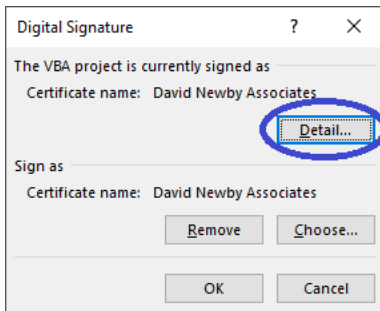


In which case you need to check to see if the VBA application has been digitally signed.

Press the **[Alt] + [F11]** keyboard keys simultaneously to open the VBA Developer window, and choose the menu option “Tools”, “Digital Signature...”:

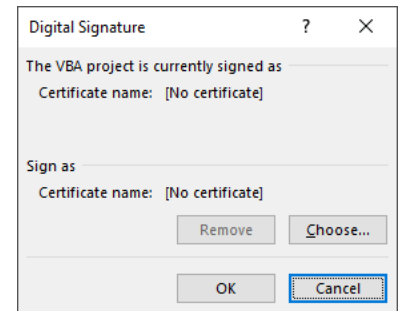


A pop up window will appear showing the details of the digital signature if one has been added:



<< Application has signature

Application has no signature >>

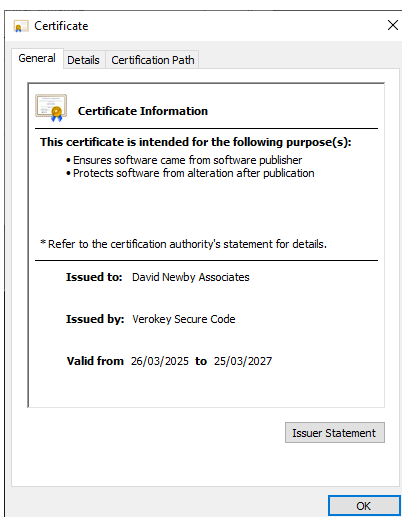


If the popup indicates that the VBA project is not currently signed it should not be “Trusted”.

If the application has no signature, it may be because it has been opened and saved on an Apple Mac machine, which automatically removes the signature.

If you are opening the application on a machine running Windows, then we strongly recommend obtaining a new copy of the application. In the case of the UN Habitat WaCT DCA you will be able to import the data from the spreadsheet without signature to the new DCA (which should have a signature).

If the application has a digital signature, the certificate details can be checked by clicking on the “Detail...” button, a pop-up window will show the basic certificate information:



Check that the certificate is current, the general information tab indicates the dates that it is valid from and to.

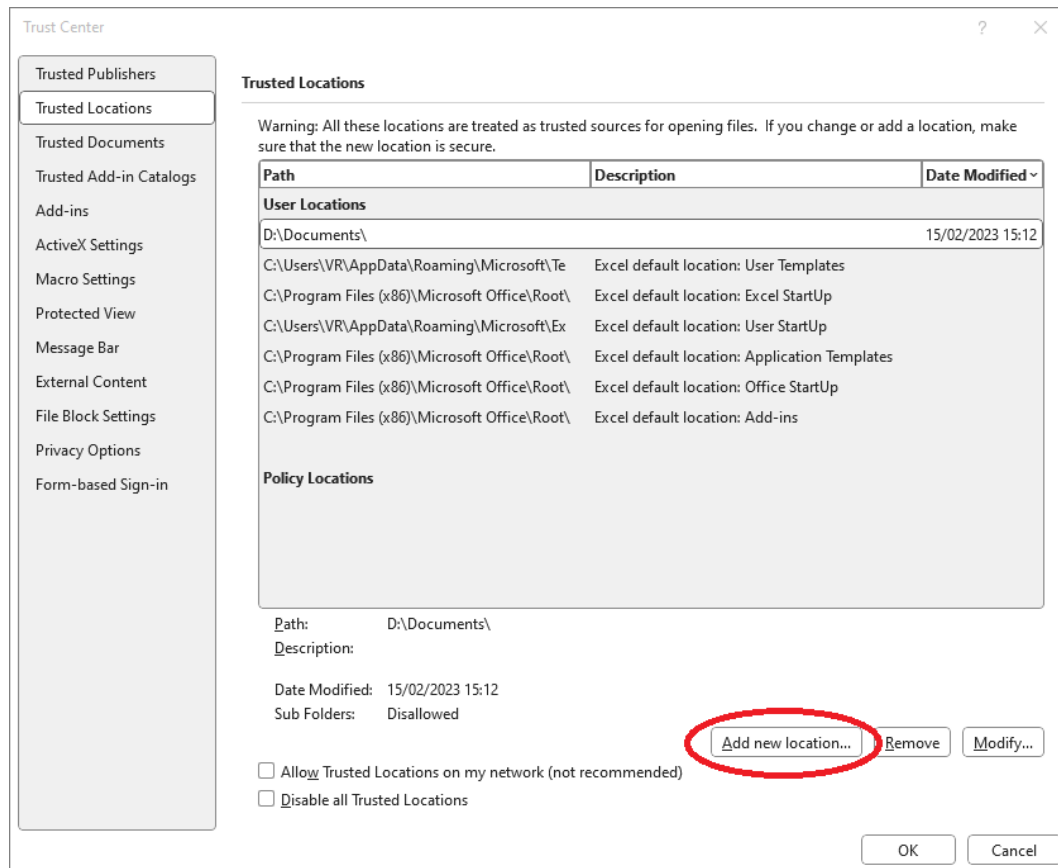
### Other Microsoft Excel / Windows security features - Trusted locations

Microsoft Excel security features to prevent malicious use of macros have been frequently updated, keeping up with these can be problematic for developers of bona-fide Excel applications that rely on Microsoft’s Visual Basic for Applications (VBA). It is strongly recommended that the digital certificate is installed if possible.

If it is not possible to install the digital certificate, and the application IS digitally signed, and the certificate is within its valid date range, then one of the following actions may enable the application to run, however this is at the user’s own risk.

It may be possible to use the “trusted locations” feature which can prevent even digitally signed macros, with certificate installed, from running if the file is opened from the “Downloads” folder or a shared network location (e.g. OneDrive). If this is the case, users are likely to see a standard excel workbook with the DNA APPLICATION ‘About’ sheet displayed. **The best way to correct this is to download the spreadsheet, open it, save it to “My Documents”, close it and then re-open it.** This usually (BUT NOT ALWAYS) satisfies the “trusted location” security check.

Alternatively, a folder can be set as a trusted location by going to the ‘Trust Center’ (see step 2 above), clicking ‘Trusted Locations’, then “Add new location...” and selecting the folder in which DNA APPLICATION is saved. We do not recommend that shared locations (e.g., OneDrive) are set as trusted locations. If you wish to use the trusted location feature we recommend creating a new folder in the “My Documents” folder on your computer, for example named “Trusted Documents” and making that new folder a trusted location.



The DNA Application could be copied to that folder and run from there.

**Warning – Making a folder a “trusted location” can enable any office application with macros to run, including files with malicious content. Do not copy office documents to a “trusted location” unless you are sure they are safe.**

If taking this approach, we suggest checking the application still has its digital signature (see page 7).

## MacOS

Unfortunately, DNA Applications that rely on Microsoft .NET libraries will not work correctly on MacOS. Please run DNA APPLICATION on a Microsoft Windows PC.

The WaCT DCA is partially functional on a Mac but data upload to the Data Portal will not succeed.