



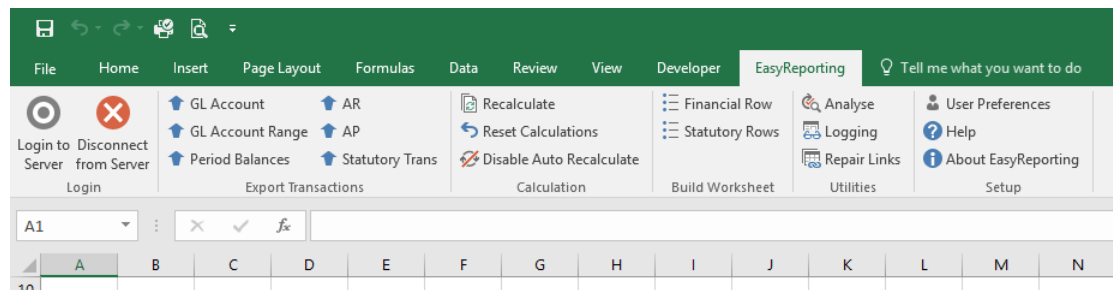
Title: Upgrading to EasyReporting Version 4.1

Abstract: This document describes essential information for EasyReporting users moving from EasyReporting 3.x EasyReporting 4 versions for Excel 2013, 2016 users.

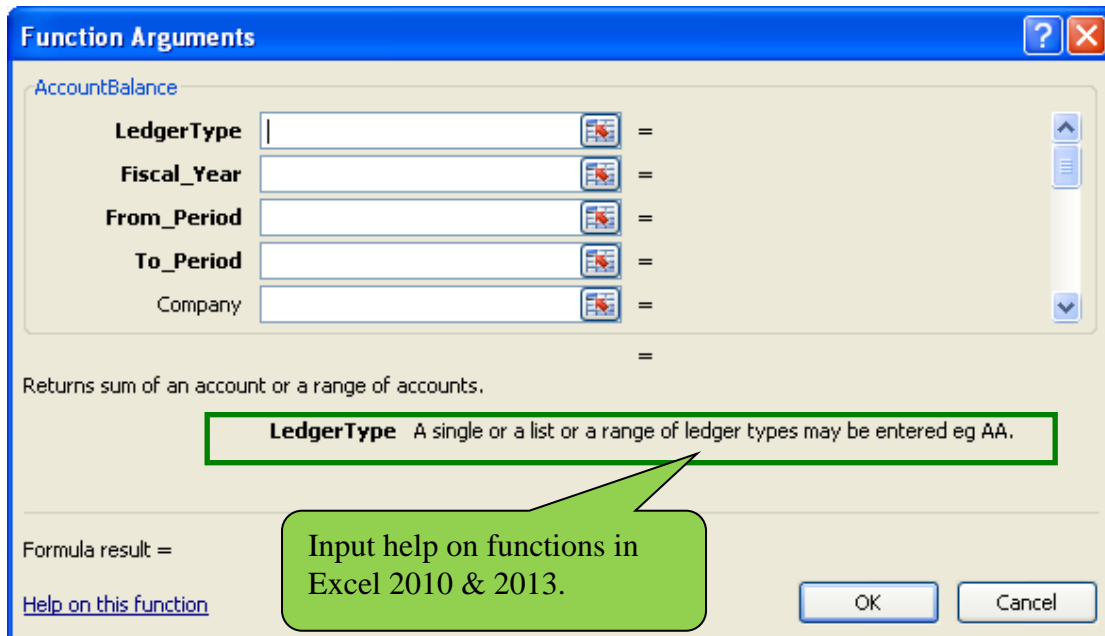
Product	EasyReporting Toolset
Suite	General Information
Release	Version 4 +
Document ID	erUpgradingToEasyReporting4_1.docx
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Overview of Changes

Excel 2007 introduced a new user interface to Excel called the ribbon. In previous version of EasyReporting the EasyReporting's tasks were displayed in command bars. To enable the use of the Ribbon in EasyReporting the Add-In is now an Excel macro enabled add-in with a file extension of XLAM previous versions of EasyReporting used the XLA Add-In file format.



In Office 2013 & 2016 Microsoft has also enabled field level help which entering functions. This feature makes it easier for users when entering new EasyReporting functions.



Impact on users Excel Workbooks

All workbooks which use EasyReporting functions will need to have their links changed from the old Add-In EasyReporting.xla to the new Add-In EasyReporting.xlam. EasyReporting provides a tool called “Repair Links” which can be found on the EasyReporting Ribbon in the Utilities group to simplify this process.

Changes to EasyReporting Configuration



To simplify and secure the setup of easy reporting it is now done in a standalone executable which can be secured or even removed from the system preventing users making unauthorised change to the EasyReporting settings. This tool is used to:

- Configure your default connection settings.
- Setup and maintain additional environments you wish to connect.
- Activate EasyReporting.

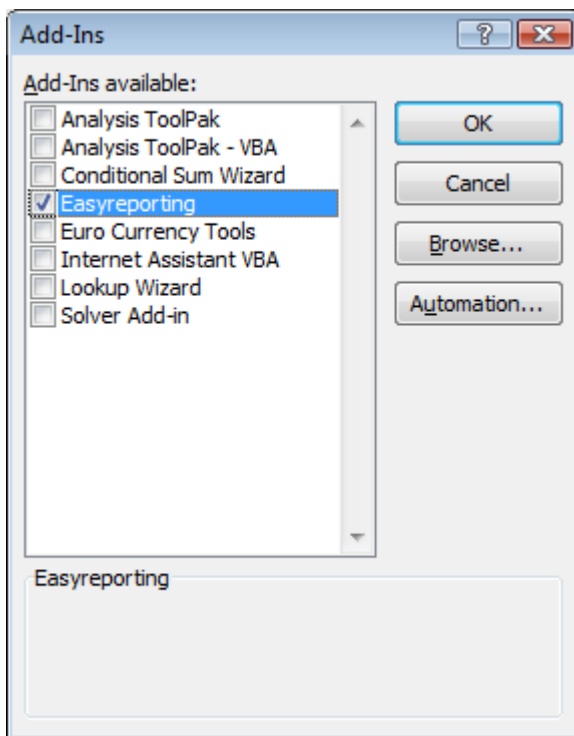
Upgrade Steps

1. Obtain the latest version of the EasyReporting toolset install executable.
2. Install EasyReporting on the target PCs or Citrix servers by a user with Administrator rights.
3. Change the Add-In to automatically be opened in Excel.
4. Link existing workbooks to use the new EasyReporting.xlam Add-in. This can be done using the “Repair Links” tool (see below).
5. Test your existing workbooks correctly work.

Set EasyReporting as an Excel Add-In

EasyReporting should be setup as an Add-In by using the following steps:

1. Click the **File tab**, and then click **Excel Options**.
2. Click **Add-Ins**, and then in the **Manage** box, select **Excel Add-ins**.
3. Click **Go**.
4. During the upgrade the Add-In manager will need to be pointed to the new EasyReporting Add-In. You will need to click on the **Browse** button to locate it (it is usually installed to c:\Program Files\EasyReporting\EasyReporting.xlam).



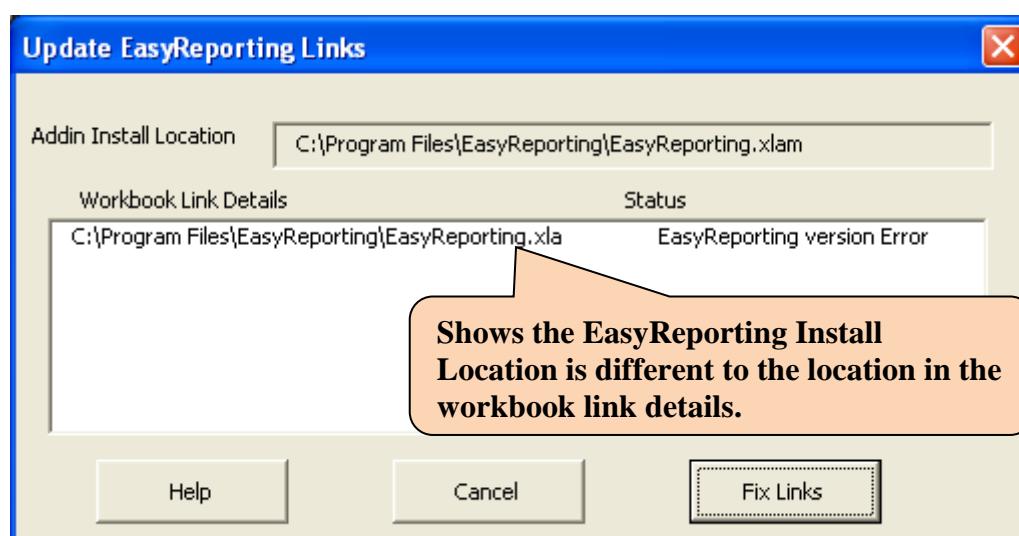
5. After you load the EasyReporting, the EasyReporting Ribbon will become visible.

Repair Links Tool

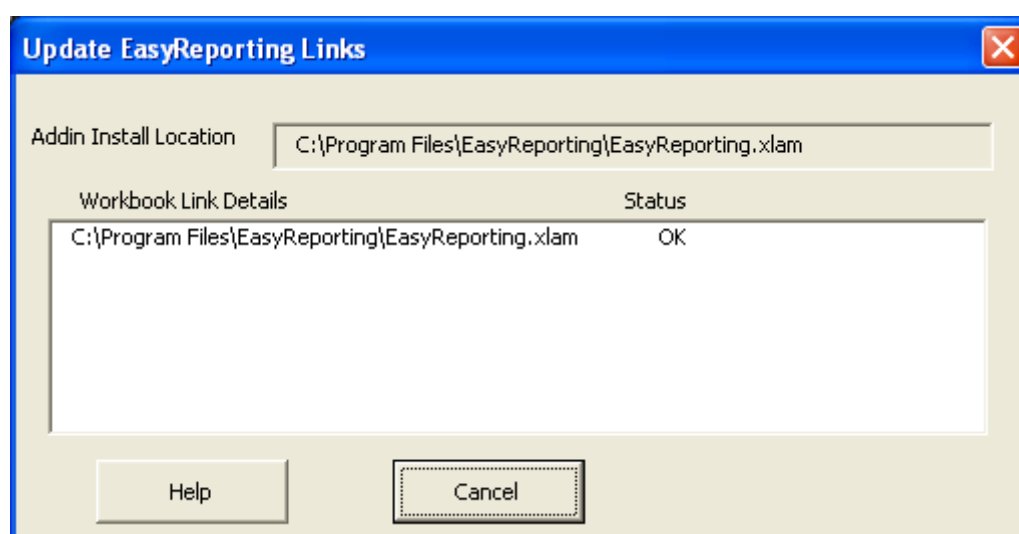
Before you can use the **Repair Links** tool the EasyReporting Add-in must be installed as an Add-In as shown above.

The repair links tool will need to be run for each of your workbooks which use EasyReporting functions.

1. Open an EasyReporting version 3 workbook.
2. Click on the EasyReporting Ribbon **“Repair Links”** the location of the EasyReporting Add-In is displayed in the top of the application and the location where EasyReporting is expecting to find the add-in is shown in the dialog box as shown below.



3. You can confirm the link has been updated by running the “Repair Links” application again. You should see the **Add-In Install Location** is now the same as the **Link Details** and the status is set to OK and the Fix Links button should be no longer visible as shown below.



4. Re-calculate your workbook and check it calculates correctly.