

EXCEL HELP (Microsoft Office for PC)



Microsoft Office 2019 on Windows PC

The budget was tested using Microsoft Excel for Microsoft 365 MSO (version 2504 64-bit). If you are using the desktop version of Excel 2019 or later, the links between files will work. The files do not link if you are saving them to 'One-Drive' or another cloud location. Also using Excel Online does not work since the files are protected and the links do not have URLs in them. *Please use caution if you are saving to the Cloud location as we cannot restore any data that was entered if it becomes corrupt or lost.*

If the macros do not work for creating PDFs on the Tools.xlsm, you can manually create PDFs. Please follow these instructions to manually print to PDF:

1. Open Tools.xlsm file and click on Open Support Files from the Main worksheet tab. This will automatically open the Codes.xlsx and Sumexpen.xlsx.
2. Select the Codes file then select each worksheet tab you want to include in the Codes.pdf document.
 - a. Hold the CTRL key down while selecting each worksheet tab.
 - b. From the Excel "File" menu, click on **"Save as Adobe PDF"**. This should open the Acrobat PDFMaker window to include the Sheets you have selected. If you need to "Add" or "Remove" you can also do from this same window.
3. Select **"Convert to PDF"**.
4. Click **'Yes'** to continue if you get a popup message about not able to convert comments.
5. Browse to your Bdgt2025 folder location.
6. If you selected multiple tabs, they will be "grouped" and **MUST** be "ungrouped" before saving. To confirm, the "grouped" worksheet tabs will appear white while the Forms are green and the Codes are blue. Right click on any worksheet tab that appears to be white and select "Ungroup Sheets". Those below that appear white are "grouped".



7. Click **"Save"**.
8. Repeat steps 2 through 6 for the Forms, Sumexpense and Budget_Glance files.

NOTE: If the worksheet tabs are "white" they are considered "grouped". Be sure to ungroup worksheets that have been selected. See #6 above.