

Downloading and Installing the “RAPID Closeout and Reporting Tool” Excel Add-in

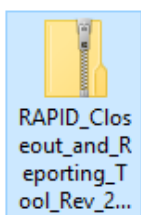
(Updated 4/22/2022)

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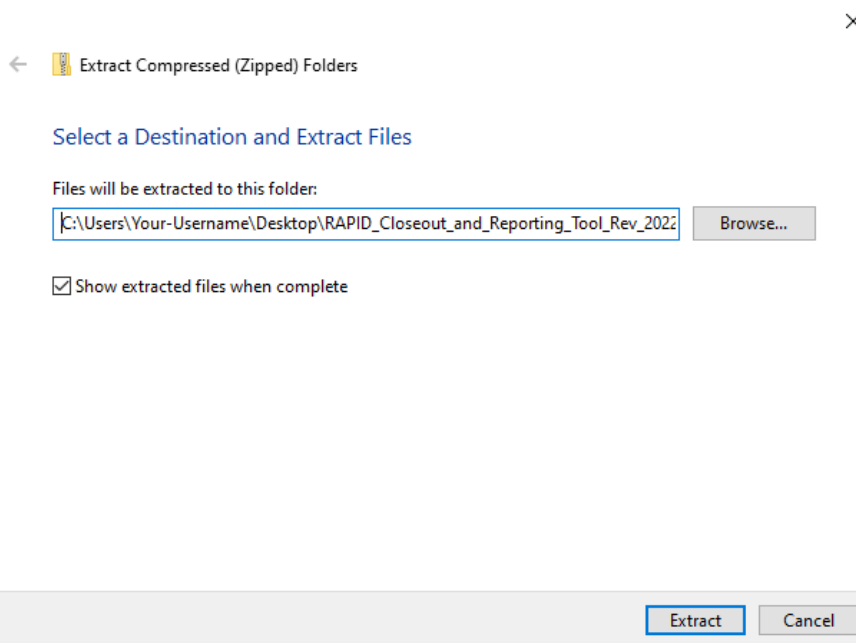
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Download and Extract the Rapid Closeout Tool




1. Download the “RAPID_Closeout_and_Reporting_Tool.zip” file, preferably to your desktop. You will see an icon for a compressed (zipped) folder that looks like this:



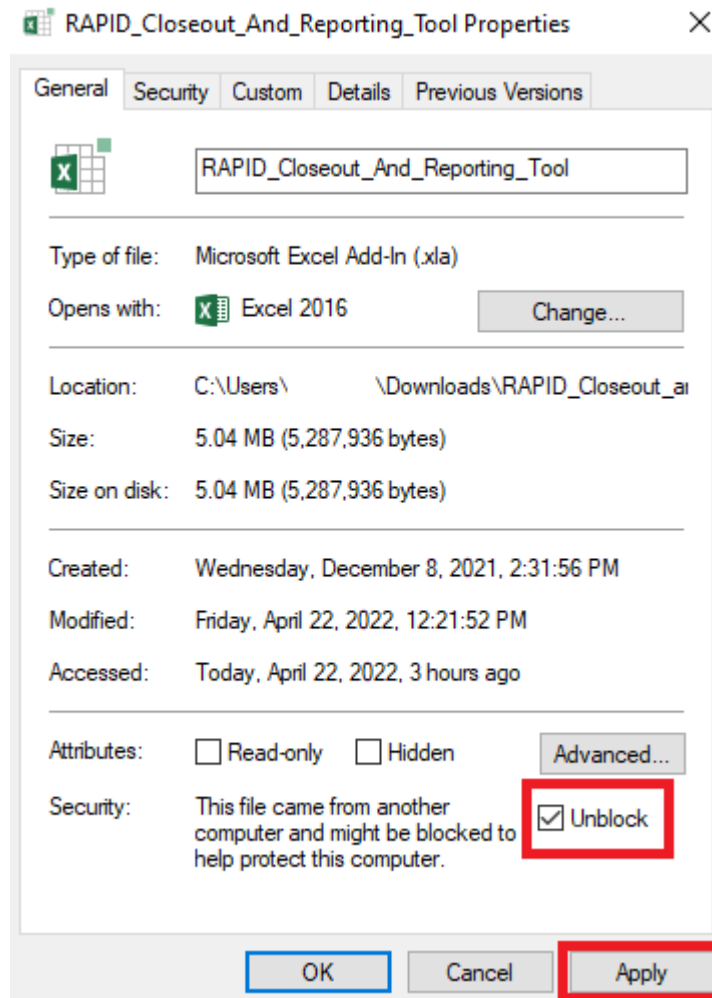
2. Right click on the icon and select “Extract All”. Select the destination for your extracted files (desktop is recommended). Confirm that “Show extracted files when complete” is checked:



3. After extraction the RAPID Closeout Tool folder should open automatically and you should now see several PDF files and the “RAPID Closeout And Reporting Tool” Excel Add In. **Do not click or double click on the xla file to open yet (Excel must be opened first):**

Name	Date modified	Type	Size
 Closeout_User_Guide	4/22/2022 12:21 PM	Adobe Acrobat D...	5,084 KB
 Installation_Instructions	4/22/2022 12:21 PM	Adobe Acrobat D...	362 KB
 RAPID_Closeout_And_Reporting_Tool	4/22/2022 12:21 PM	Microsoft Excel A...	5,164 KB

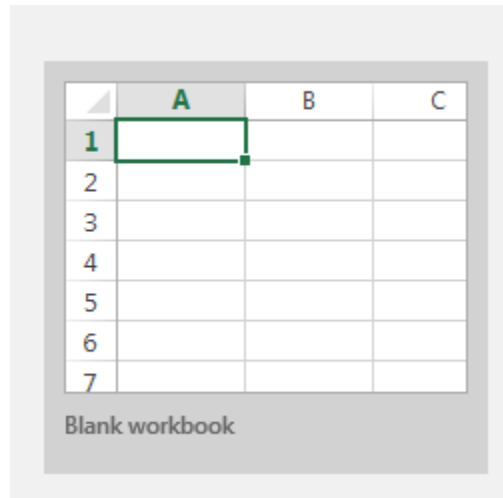
4. Before the RAPID Closeout Tool can be used with Excel the .xla add-in file must be Unblocked by following the steps below:
1. Right-click the file named RAPID_Closeout_And_Reporting_Tool and select Properties
 2. At the bottom of the General tab, click the Unblock button or check the Unblock checkbox (circled in red in attached image)
 3. Click the Apply button, then the OK button



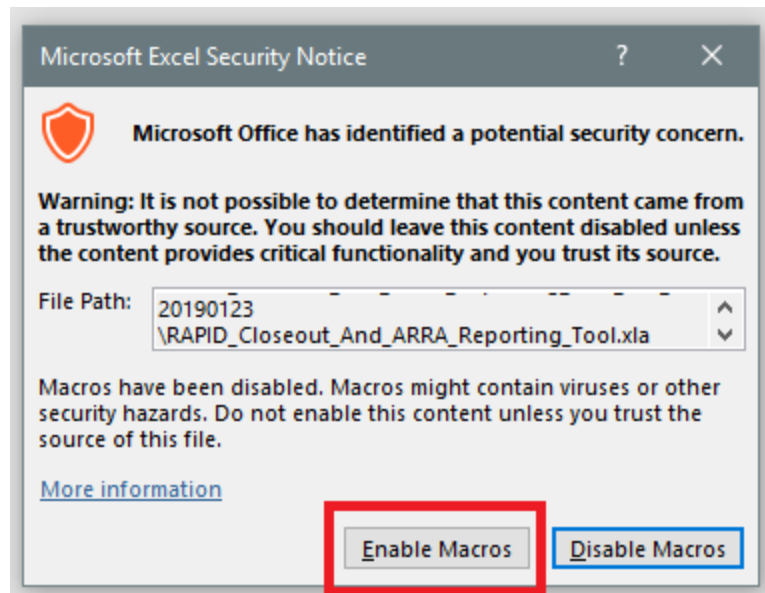
Instructions for Excel versions 2010, 2013 and 2016

Note: You will need to follow these exact instructions every time you use the RAPID closeout tool.

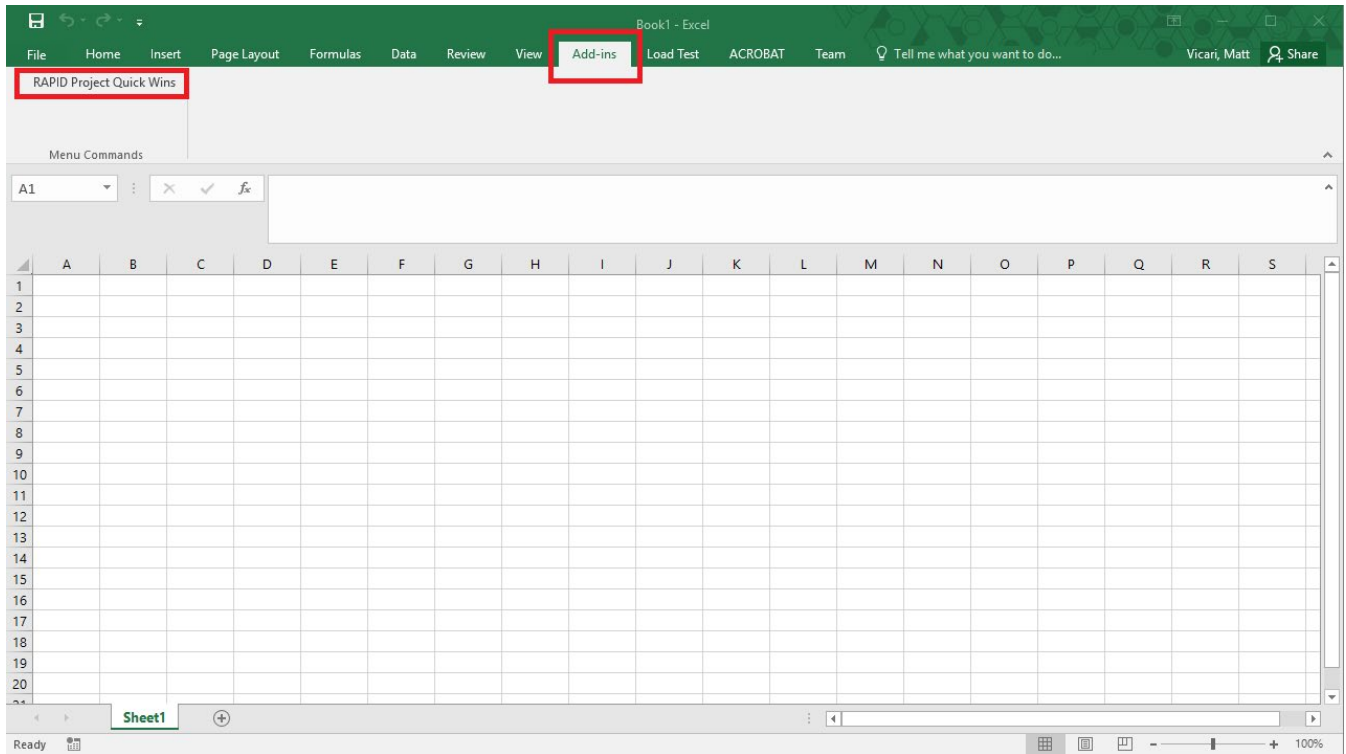
1. Open Microsoft Excel and double click on “Blank workbook” to open an empty Excel workbook file:



2. Go Back to the folder containing the “RAPID Closeout and Reporting Tool” Excel Add-in xla file and double click on the file.
3. You may receive a “Microsoft Excel Security Notice” pop-up warning. This message prompts you to either enable or disable Macros in Excel. Click the “Enable Macros” button:




4. A new tab called “Add-ins” should appear in the Excel ribbon at the top of the document. Click on the “Add-ins” tab and you will now see “Rapid Project Quick Wins” listed on the top left side of the excel document. Click on “Rapid Project Quick Wins”:



5. If you do not see the Excel Add-In Ribbon after downloading/installing the tool, please do the following:
 1. Right-click the downloaded .xla file and select Properties
 2. At the bottom of the General tab, click the Unblock button or check the Unblock checkbox
 3. Press the OK button
 4. Close Excel completely and re-open itThe Add-In ribbon and the RAPID Closeout Tool will now be visible.

6. In the screen that appears, log in with your QDB username and password:

RAPID Project Quick Wins - Version Date: 1/23/2019



UCLA
RAPID
Research Administration Process Improvement & Deployment

AIS SERVER

QDB ID

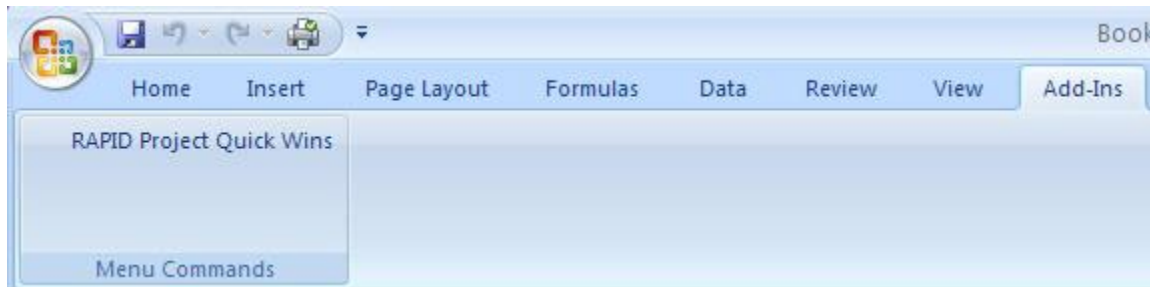
QDB Pwd

If you get locked out, please call IT Services Client Support, 5-8000

RAPID leadership appreciates the many contributions made by the programming staff in the David Geffen School of Medicine Dean's Office during our collaboration to develop this tool.

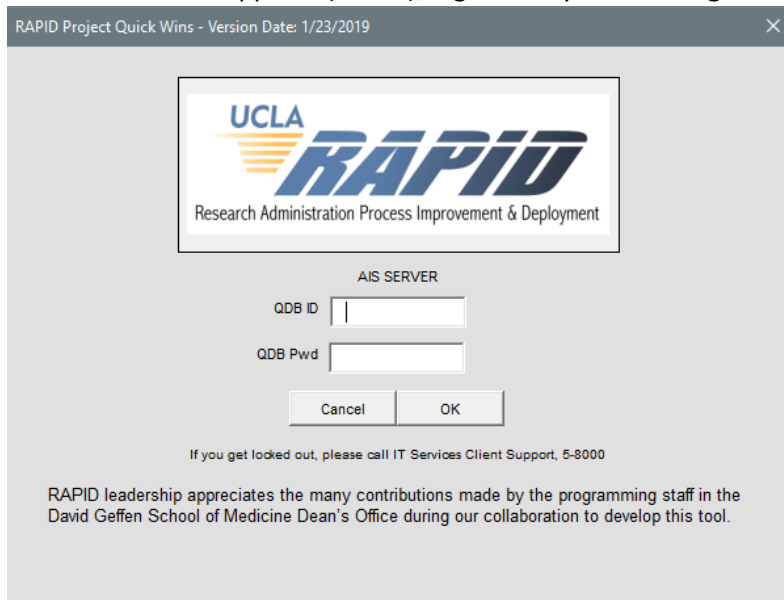
Instructions for Excel version 2007

“RAPID Project Quick Wins” will be added to the **Add-Ins** menu. (See screenshot below.)



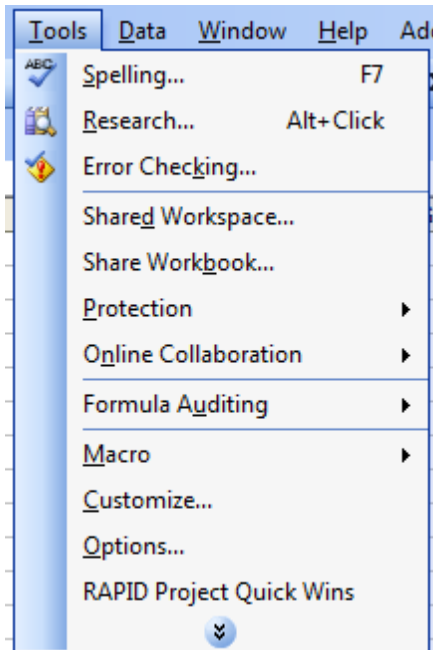
To run it, click **Tools** → **RAPID Project Quick Wins**

In the screen that appears (below), log in with your **QDB login and password**.

A screenshot of the RAPID Project Quick Wins login window. The window title is "RAPID Project Quick Wins - Version Date: 1/23/2019". It features the UCLA RAPID logo (Research Administration Process Improvement & Deployment) and a login section labeled "AIS SERVER". The login section includes fields for "QDB ID" and "QDB Pwd", and "Cancel" and "OK" buttons. A footer message reads: "If you get locked out, please call IT Services Client Support, 5-8000. RAPID leadership appreciates the many contributions made by the programming staff in the David Geffen School of Medicine Dean's Office during our collaboration to develop this tool."

Instructions for Excel versions 2000 to 2003

“RAPID Project Quick Wins” will be added to the Tools menu. (See screenshot below.)



To run it, click **Tools → RAPID Project Quick Wins**

In the screen that appears (below), log in with your **QDB login and password**.

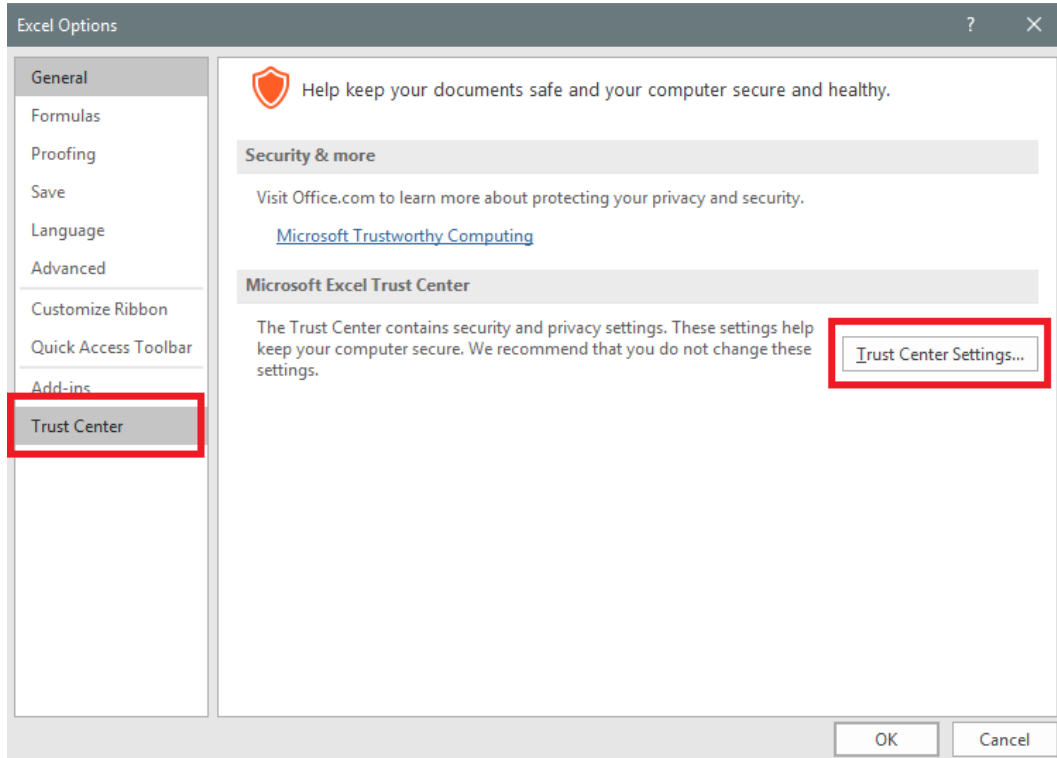
A screenshot of the 'RAPID Project Quick Wins - Version Date: 1/23/2019' window. The window has a title bar with a close button. Inside, there is a logo for 'UCLA RAPID' with the tagline 'Research Administration Process Improvement & Deployment'. Below the logo, it says 'AIS SERVER'. There are two input fields: 'QDB ID' and 'QDB Pwd'. Below these fields are 'Cancel' and 'OK' buttons. At the bottom, there is a line of text: 'If you get locked out, please call IT Services Client Support, 5-8000'. At the very bottom, there is a paragraph: 'RAPID leadership appreciates the many contributions made by the programming staff in the David Geffen School of Medicine Dean's Office during our collaboration to develop this tool.'

Troubleshooting

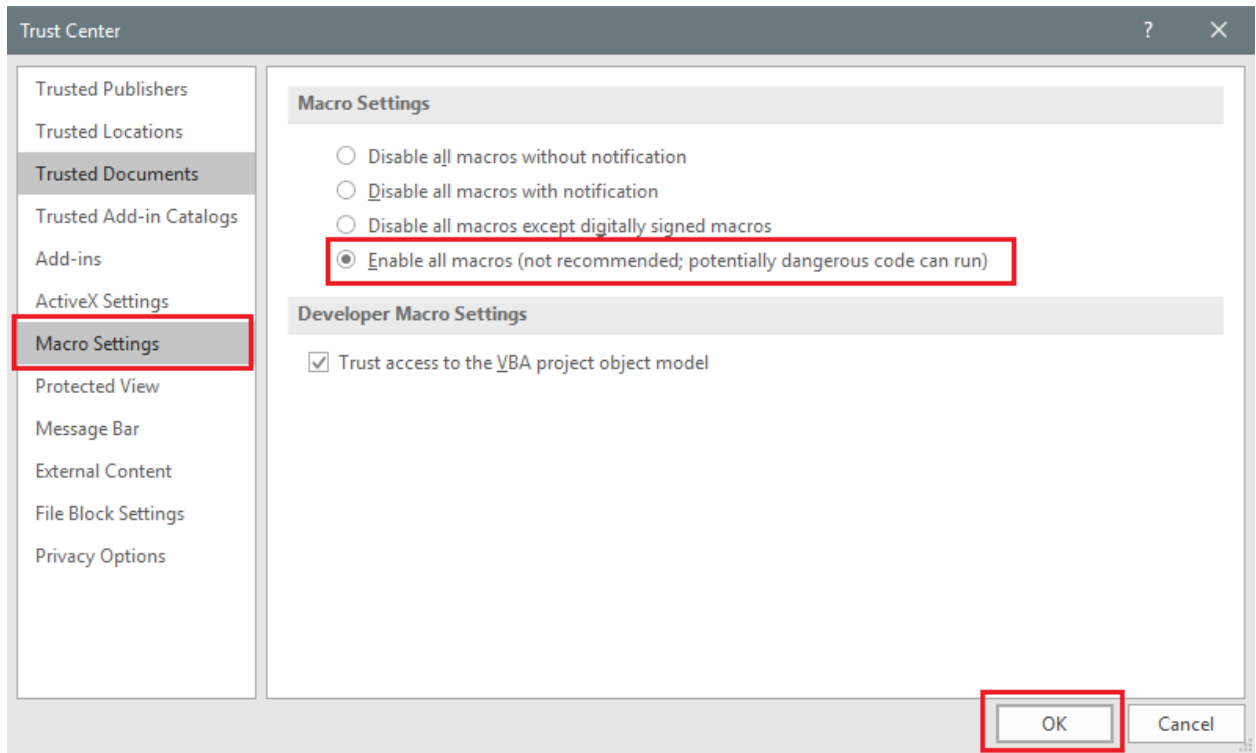
If you receive an error message, try adjusting your Excel macro settings:

In Excel versions 2010 to 2016:

1. Click **“File” → “Options”**
2. On the left side of the Options window click **“Trust Center”** then click the button **“Trust Center Settings”**:



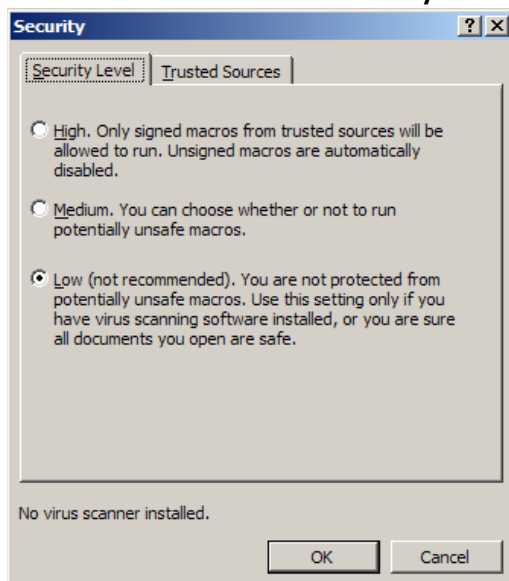
- Click “Macro Settings” on the menu on the left side of the window. Then check the option “Enable All Macros” and click “Ok”:



- Click “Ok” again to dismiss the Excel Options window. Close and restart Excel, then follow the instructions for opening the RAPID closeout tool.

Troubleshooting in Excel versions 2000 to 2003:

Click Tools → Macro → Security



If the Security Level is set on **High**, try a lower setting and press **OK**.
Run the program again.

Note: You may need to exit and reopen Excel.

If the Security Level is set to **Medium**, Excel will ask if you want to run the program.
Click on **Yes** to enable the macro.

In Excel 2007:

If the following error message appears, click on “Enable Macros”

