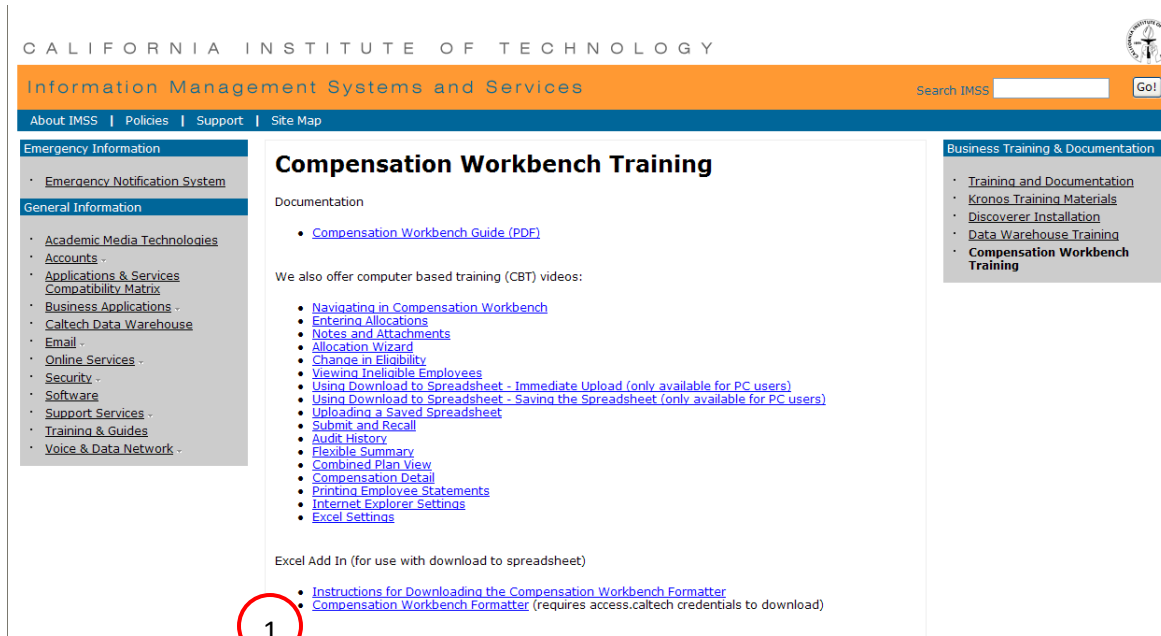


Installing the CWB Formatter

The Compensation Workbench Formatter is for use with the Download to Spreadsheet function in the Compensation Workbench application and is only for use with PC's.



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Compensation Workbench Training

Documentation

- [Compensation Workbench Guide \(PDF\)](#)

We also offer computer based training (CBT) videos:

- [Navigating in Compensation Workbench](#)
- [Entering Allocations](#)
- [Notes and Attachments](#)
- [Allocation Wizard](#)
- [Change in Eligibility](#)
- [Viewing Ineligible Employees](#)
- [Using Download to Spreadsheet - Immediate Upload \(only available for PC users\)](#)
- [Using Download to Spreadsheet - Saving the Spreadsheet \(only available for PC users\)](#)
- [Uploading a Saved Spreadsheet](#)
- [Submit and Recall](#)
- [Audit History](#)
- [Flexible Summary](#)
- [Combined Plan View](#)
- [Compensation Detail](#)
- [Printing Employee Statements](#)
- [Internet Explorer Settings](#)
- [Excel Settings](#)

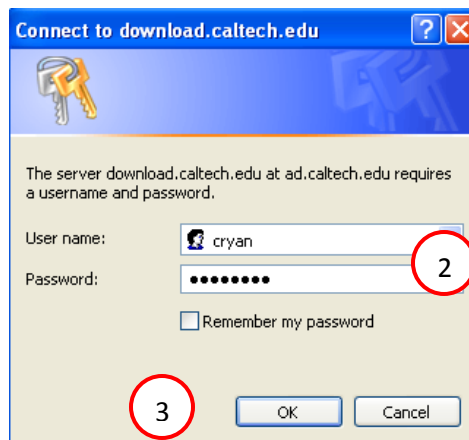
Excel Add In (for use with download to spreadsheet)

- [Instructions for Downloading the Compensation Workbench Formatter](#)
- [Compensation Workbench Formatter \(requires access.caltech credentials to download\)](#)

1

1) Double click on the **Compensation Workbench Formatter** link.

A *Connect to download.caltech.edu* window will open



Connect to download.caltech.edu

The server download.caltech.edu at ad.caltech.edu requires a username and password.

User name:

Password:

Remember my password

3

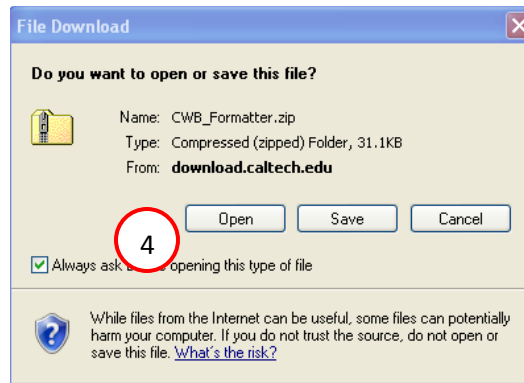
OK Cancel

2

2) Enter your **access.caltech** login credentials.

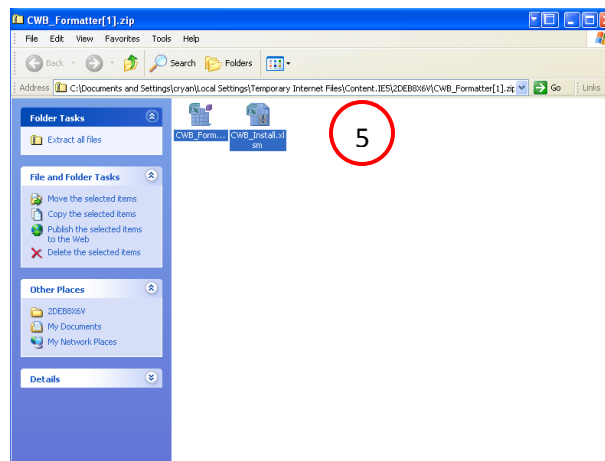
3) Click on the **OK** button.

A *File Download* window will open



4) Click on the **Open** button.

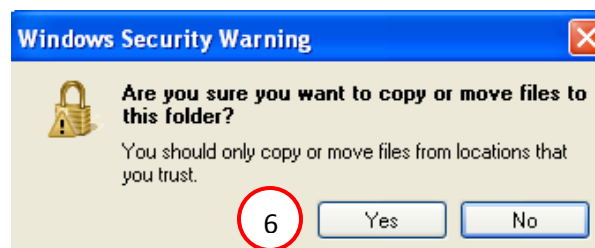
A *CWB_Formatter zip* file will open



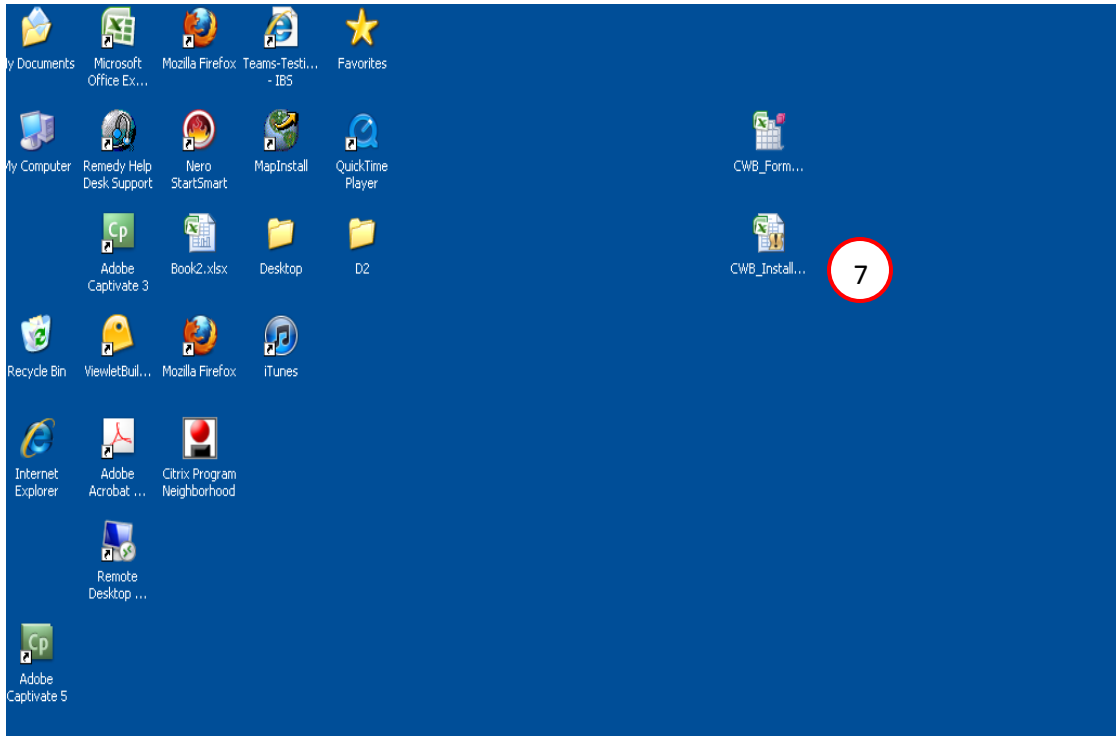
5) **Copy both files** onto your *desktop*.

- Minimize your browser windows
- Highlight both files
- Drag them onto your desktop

A *Windows Security Warning* window will open

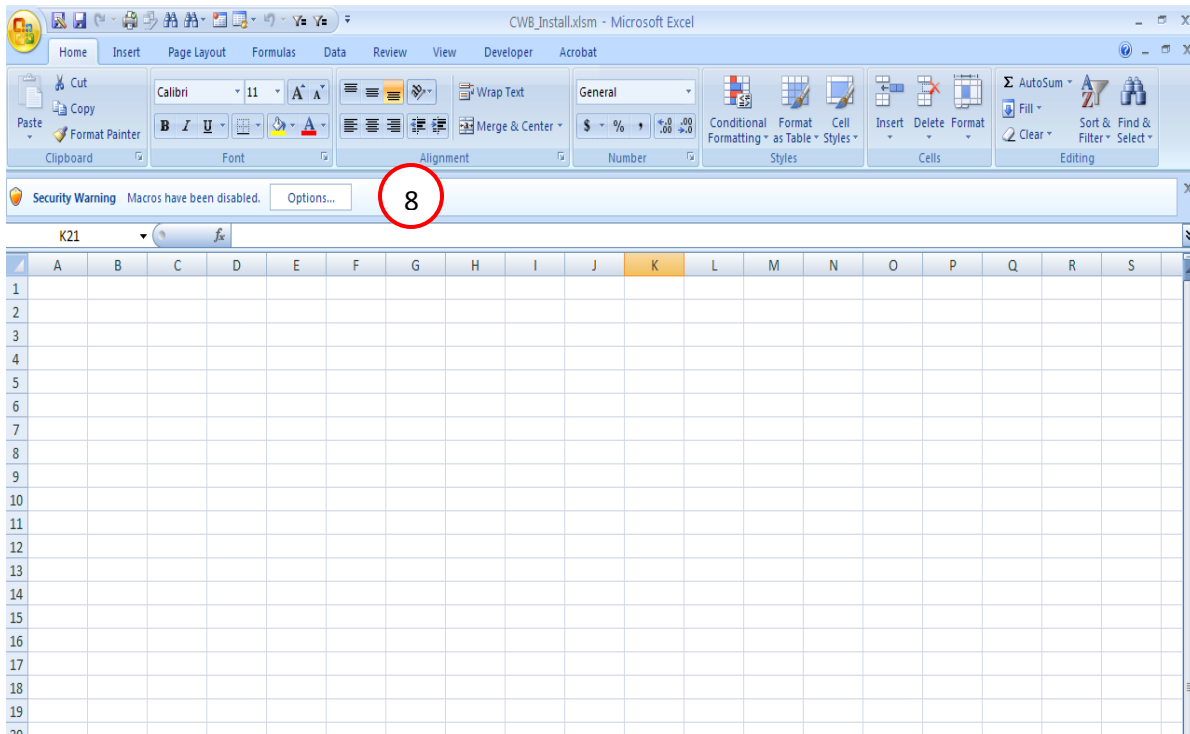


6) Click on the **Yes** button.



7) Double click on the **CWB_Install** icon on your desktop.

An *Excel* workbook will open



8) Click on **Options...**

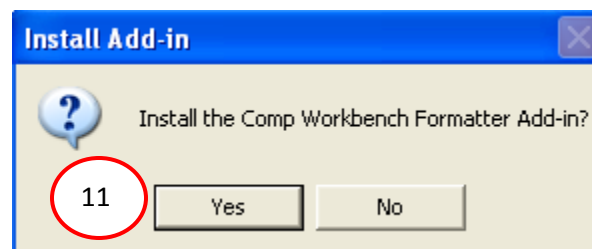
A *Microsoft Office Security Options* window will open



9) Click on the **Enable this content** radio button.

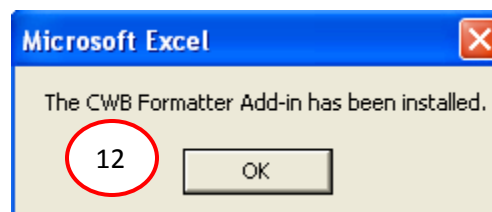
10) Click on the **OK** button.

An *Install Add-in* window will open



11) Click on the **Yes** button (this process may take a few minutes to complete).

A *Microsoft Excel* window will open



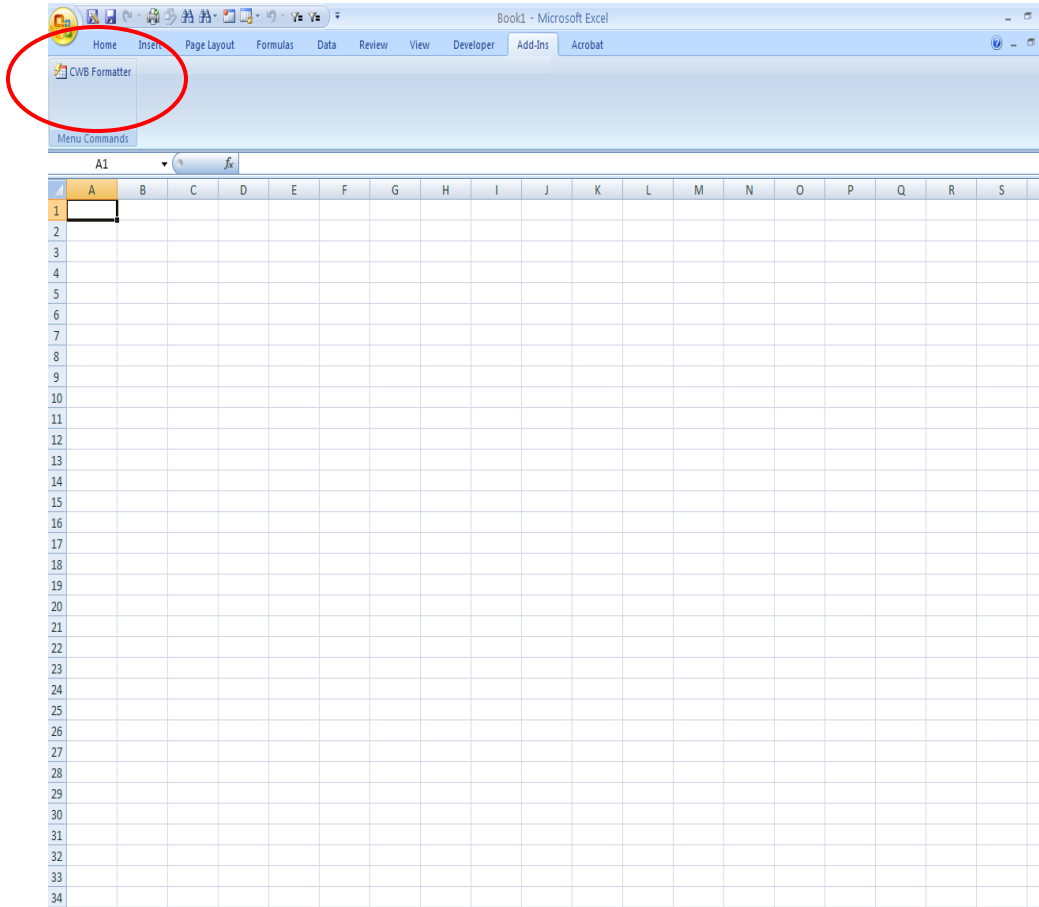
12) Click on the **OK** button.

13) **Close** the Excel Workbook.

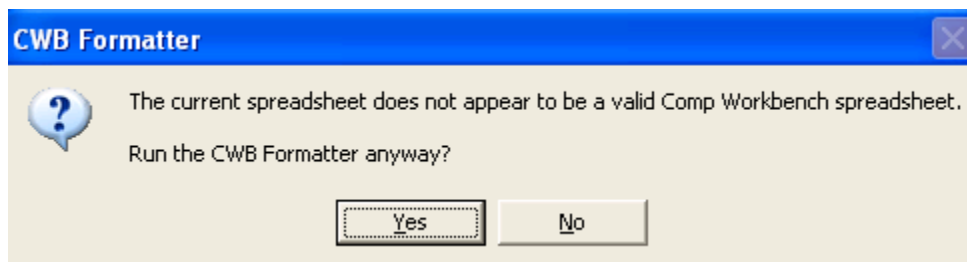
14) Delete the **CWB_Formatter** and **CWB_Install** files from your desktop.

Viewing the Installed Add-In

In order to view the installed Add-In opens a new Excel spreadsheet.



The **CWB Formatter** is now available within the Add-In tab. It is only for use with a downloaded Compensation Workbench spreadsheet. If you attempt to use it on a non Comp Workbench spreadsheet you will receive the following message:



If receive this message you are attempting to run the CWB Formatter macro in a non Compensation Workbench downloaded spreadsheet. Click on the **No** button.