

Managing Add-ins

The existing Access Ledger Excel Add-in will stop working with the Access Ledger version 2025.07.01.

The new Access Accountants Excel Add-in includes the existing Access Ledger Add-in as well as the new “Workpapers by ChangeGPS” Add-in.

- Access Ledger: Import data into the Access Ledger file from Excel
- Workpapers by ChangeGPS: Automation for Workpapers



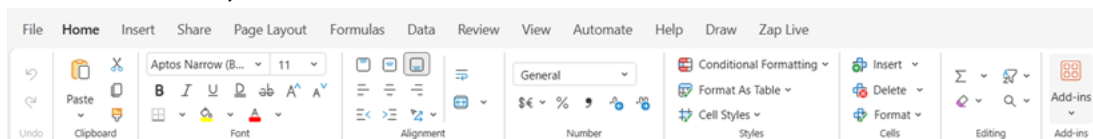
Side Load the Add-in

Until the Add-in is available in the Microsoft Store, users will need to Side Load the Add-in by following these steps.

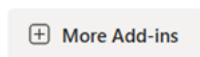
Download the manifest file here:

[Shared Files · Access Software Australia Pty Limited](#)

1. Open a blank worksheet in Microsoft Excel.
2. In the main menu, select the **Home** tab and select **Add-ins**.

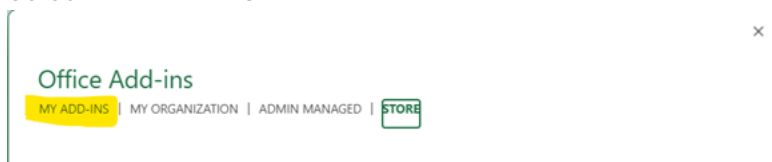


3. Select **More Add-ins**.

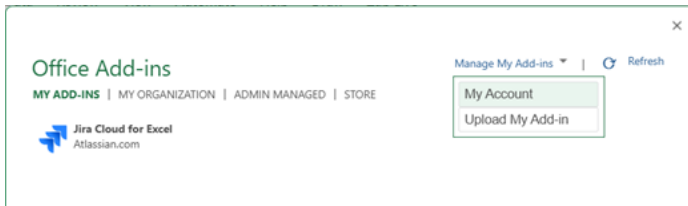


This opens the Office Add-ins window.

4. Select **MY ADD-INS**.

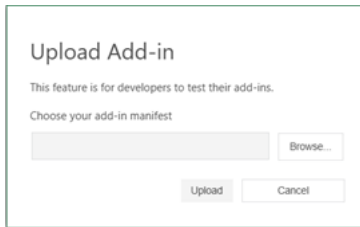


5. From the **Manage My Add-ins** dropdown menu, select **Upload My Add-in**.

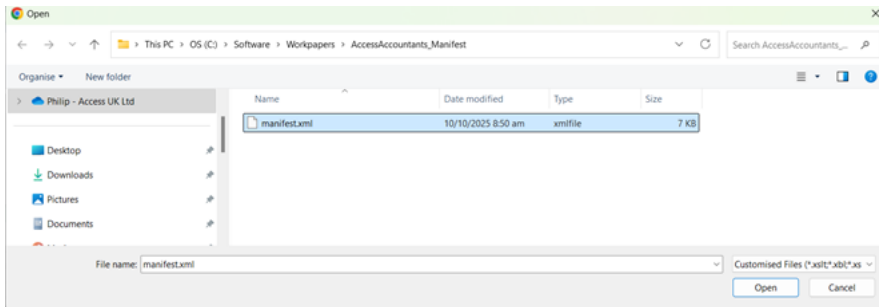


This opens the **Upload Add-in** dialogue window.

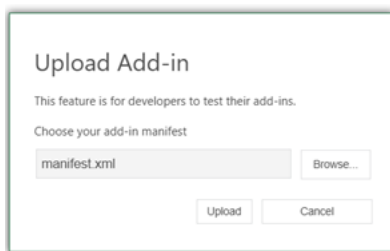
6. Select **Browse**.



7. Browse and select the downloaded manifest.xml Add-in file.



8. Select **Upload** to upload and load the Add-in.



This enables the Access Accountants toolbar.

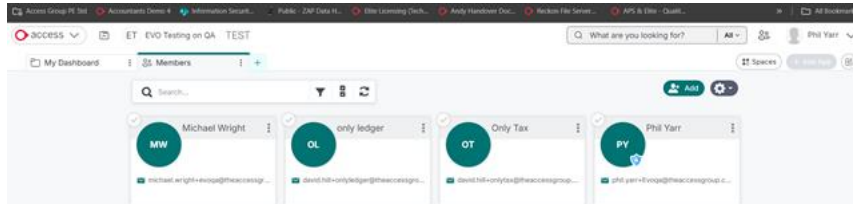


Setting permissions for using the buttons

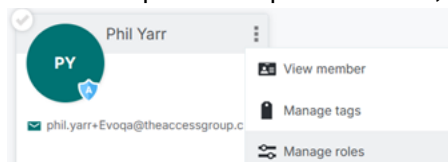
Permissions for the Access Accountants Excel Add-in are controlled via Access Evo. Each button has its own permissions which are set in Access Evo.

Here's how to create users and set permissions:

1. Open Access Evo and select the required user.



2. From the options dropdown menu, select **Manage Roles**.



This displays the **Manage roles: [user name]** dialogue window.

3. In the **Products** section:

- **Access Ledger** allows importing of data into Access Ledger from Excel.
- **Workpapers by ChangeGPS** provides users access to the Workpapers automation tools. Currently, there are no permissions specific to Admin/Administrator or User roles. However, it is recommended to set the admin and user roles appropriately, as permissions will likely be applied to these roles in the future.

