ACCESS ANALYTIC

ChatGPT for Microsoft Office

Instructions and FAQ
August 2023
Version 20230801

Summary

The Great 48 Toolbar contains a series of buttons we've been using and sharing with clients for years. We've now added an additional section of buttons that can utilize Chat GPT.

The use of the GPT buttons will require you to get an Open AI API key and enter your credit card details in the Open AI platform. You should set a $1 dollar limit in the Open AI billing site initially and see how far that gets you.

If GPT is not for you then the rest of the buttons on the Great 48 toolbar work without it and it's totally free to use forever. Read more later in this document about how to install it.

If you don't want to use the buttons for GPT or want to see the code and create your own ribbon then the code is later in this document.

Using the VBA code provided, you can add buttons into Microsoft Excel, Word and Outlook that allow you to access your most frequently used ChatGPT prompts and combine these with data/text from your Office programs.

ACKNOWLEDGEMENTS

Leila Gharani was the originator of this Open AI API connection concept, and Sven from CodingIsFun then created a VBA version based on Leila's idea, which was implemented into Excel.

We have enhanced and extended this in Excel and have also ported the code to Word and Outlook.

FEEDBACK & SUGGESTIONS

Feel free to send us your feedback and suggestions at info@accessanalytic.com.au

SUPPORT

This is a free program so we're unable to provide free support unfortunately.

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DO NOT ATEMPT TO USE THE CODE FOR CALCULATIONS IN EXCEL

ChatGPT is an AI language model developed by OpenAI. While ChatGPT is designed to provide helpful information and assistance, it is important to note that it should not be relied upon for calculations or any other specific numerical tasks. The responses generated by ChatGPT are based on patterns and information learned from a vast amount of text data, but they may not always be accurate or up to date.

Calculations require precision and accuracy, and it is recommended to consult appropriate professionals, experts, or trusted sources for reliable calculations. OpenAI and its developers do not guarantee the accuracy, completeness, or suitability of any calculations performed or suggested by ChatGPT.

Using ChatGPT for calculations or making decisions based solely on its responses can result in errors or incorrect outcomes. It is always prudent to exercise caution and independently verify any information or calculations obtained through ChatGPT before relying on them.

By using ChatGPT and the VBA code provided by Access Analytic Solutions, you acknowledge and agree that Access Analytic Solutions, OpenAI and its developers shall not be held responsible or liable for any inaccuracies, losses, damages, or consequences arising from the use of ChatGPT or this VBA code for calculations or any reliance placed upon its responses.

Privacy and Confidentiality

OpenAI highly values the privacy of users and is committed to maintaining the confidentiality of their personal data. This notice explains how OpenAI handles and uses user data when interacting with ChatGPT.

DATA USAGE AND RETENTION:

Data sent to the OpenAI API will not be used to train or improve OpenAI models. Data sent to the OpenAI API is not retained or used in any way by Access Analytic Solutions either.

To help identify abuse, API data may be retained by OpenAI for up to 30 days, after which it will be deleted (unless otherwise required by law).

Additional information

DATA SECURITY:

OpenAI implements industry-standard security measures to protect user data against unauthorised access, alteration, or disclosure. However, it is important to note that no

method of transmission over the internet or electronic storage is entirely secure, and OpenAI cannot guarantee absolute data security.

DATA SHARING:

OpenAI prioritises user privacy and endeavours to restrict the sharing of user data. OpenAI does not engage in the sale, rental, or sharing of personal information with third parties for commercial purposes.

LEGAL COMPLIANCE:

OpenAI adheres to applicable laws and regulations pertaining to data protection and privacy. In exceptional circumstances, OpenAI may be obligated to disclose user data to comply with legal obligations or safeguard its rights, property, or safety.

UPDATES TO THIS NOTICE:

OpenAI may update their Privacy and Confidentiality Notice periodically. Users are encouraged to review this notice periodically to stay informed about how OpenAI handles their data.

CONTACT INFORMATION:

For any questions, concerns, or requests regarding user privacy or the use of data, users can contact OpenAI at privacy@openai.com.

By continuing to use ChatGPT and the VBA code herein, users indicate their acceptance of this Privacy and Confidentiality Notice.

Last updated: 20 June 2023

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System Requirements

Windows v10
Microsoft Office 365 or 2016+ with ability to run VBA macros

Installation

PRE-REQUISITE

Get your OpenAI API key, available from https://openai.com/blog/openai-api

Video Instructions

When you run the macros, you will automatically be prompted to enter your API key.

- You only need to do this **once** and it will work in Excel, Word and Outlook.
- You **don't** need to edit the VBA code.
- If you use the incorrect API or want to change it you'll need to open your Registry Editor (Windows button > type "reg" to find this) and replace the value at Computer\HKEY_CURRENT_USER\SOFTWARE\VB and VBA Program Settings\ChatGPTOffice\Settings\API_KEY

OPTION 1: PRE-BUILT TOOLBAR INSTALLATION FOR WORD & EXCEL

For both of these, we've created add-ins that you can download and save-as. Just follow the instructions in each file and a new Access Analytic toolbar (ribbon) will be added.

This is the easiest way to get access to the macros in Excel and Word.

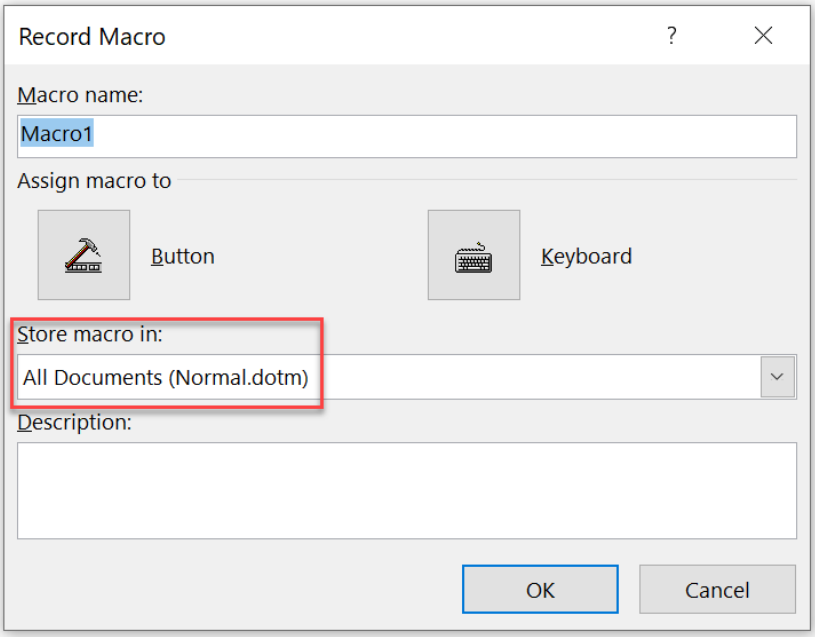
Details and Download

OPTION 2: ADVANCED INSTALLATION FOR WORD, EXCEL & OUTLOOK

Use this method if you want to see the VBA code and add your own buttons to your Quick Access Toolbar or if you want to use ChatGPT with Outlook.

1. Customize the Ribbon to display the Developer Ribbon and create a place to store the VBA code. This is the same in Word, Excel and Outlook.
    a. Video instructions
2. Copy & paste the code from the relevant text file into the Module created.
    a. **Excel**:
        i. Follow the instructions in the video above to create a new VBA module & paste all the code from Excel.txt into this
    b. **Word**:

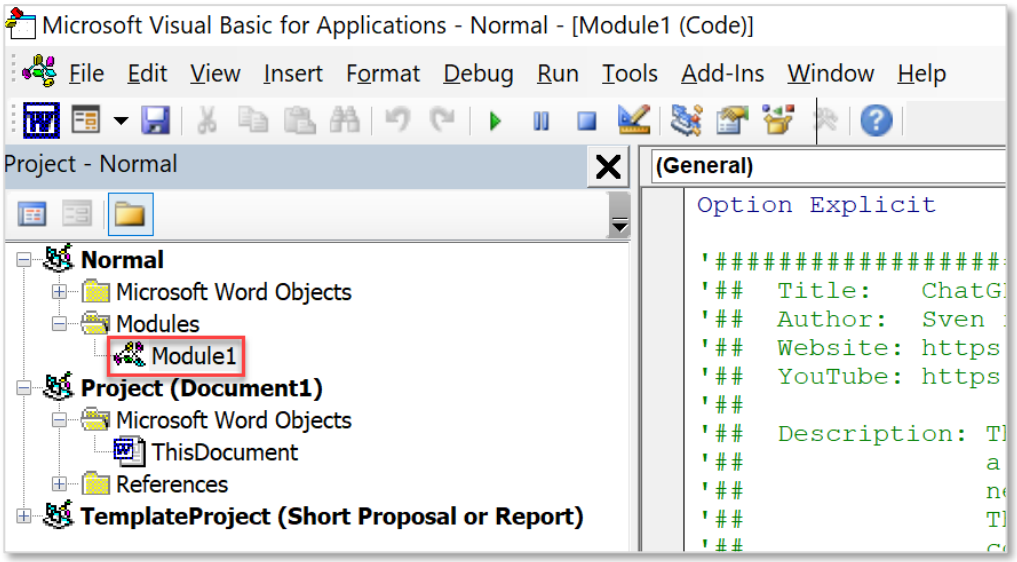
i. follow the same process in Word to record a dummy macro1



ii. Stop recording

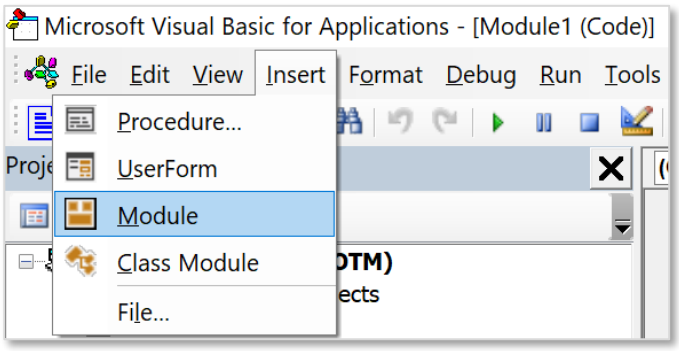
iii. Go to **Developer > Visual Basic** to open the Visual Basic Editor, then delete the macro that was created

iv. Copy the code from Word.txt and paste this into Module1 in the Normal template:

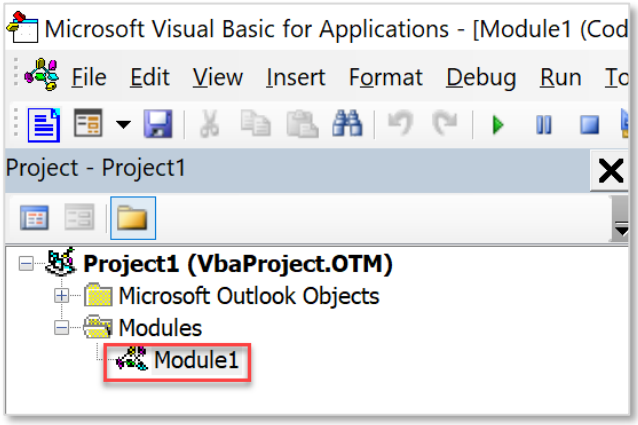


c. **Outlook**:

i. Insert a new VBA module:

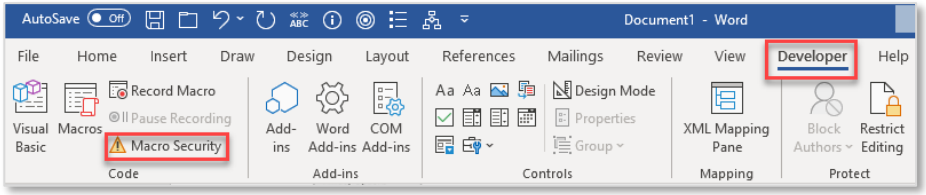


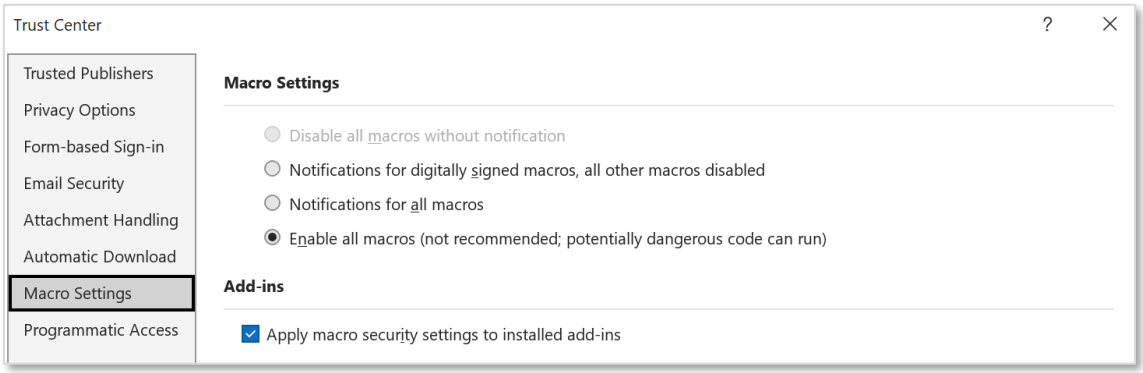
ii. Copy the code from Outlook.txt and paste this into the Module you just created (Module1)



iii. Adjust your Macro Security settings to allow macros to run

Go to **Developer > Macro Security**:





Adding Buttons to Access the Macros

OPTION 1: QUICK ACCESS TOOLBAR

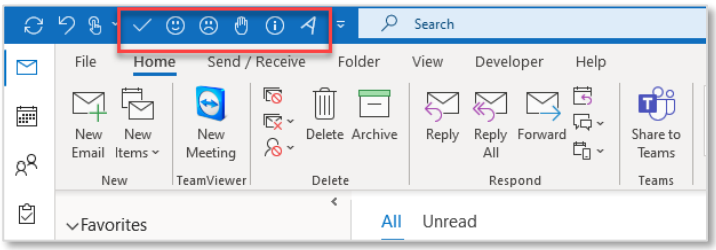
We recommend adding buttons to your Quick Access Toolbar (QAT) so they are always accessible from any file. Video Instructions

Add a button to access each of the OpenAI macros.

Repeat this process for each Office program to add the icons to the QAT of each.

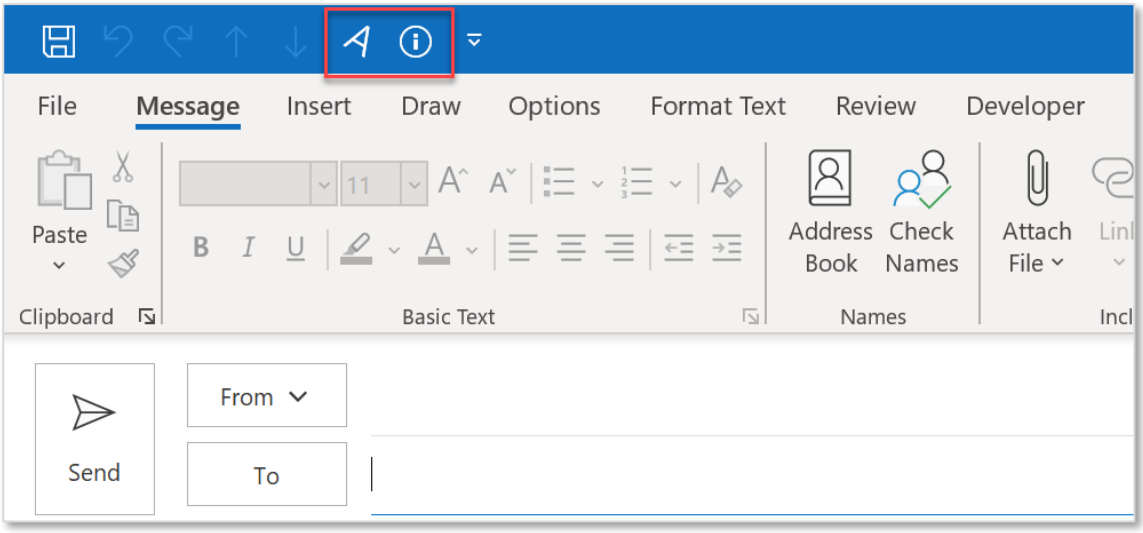
In Outlook, customize the QAT of the main Outlook screen, the **Reply** form and the **New Email** form.

Main Outlook Screen



Here, we have created icons for Acknowledge Email, Reply Yes, Reply No, Reply Thanks, Explain and Reword.

New Email or Reply to Email



Here, we have only added the Reword and Explain icons since we are creating a new email and the other icons don't make sense in this context.

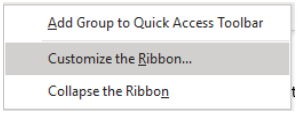
Add the same icons to the Reply form.

OPTION 2: CUSTOM RIBBON

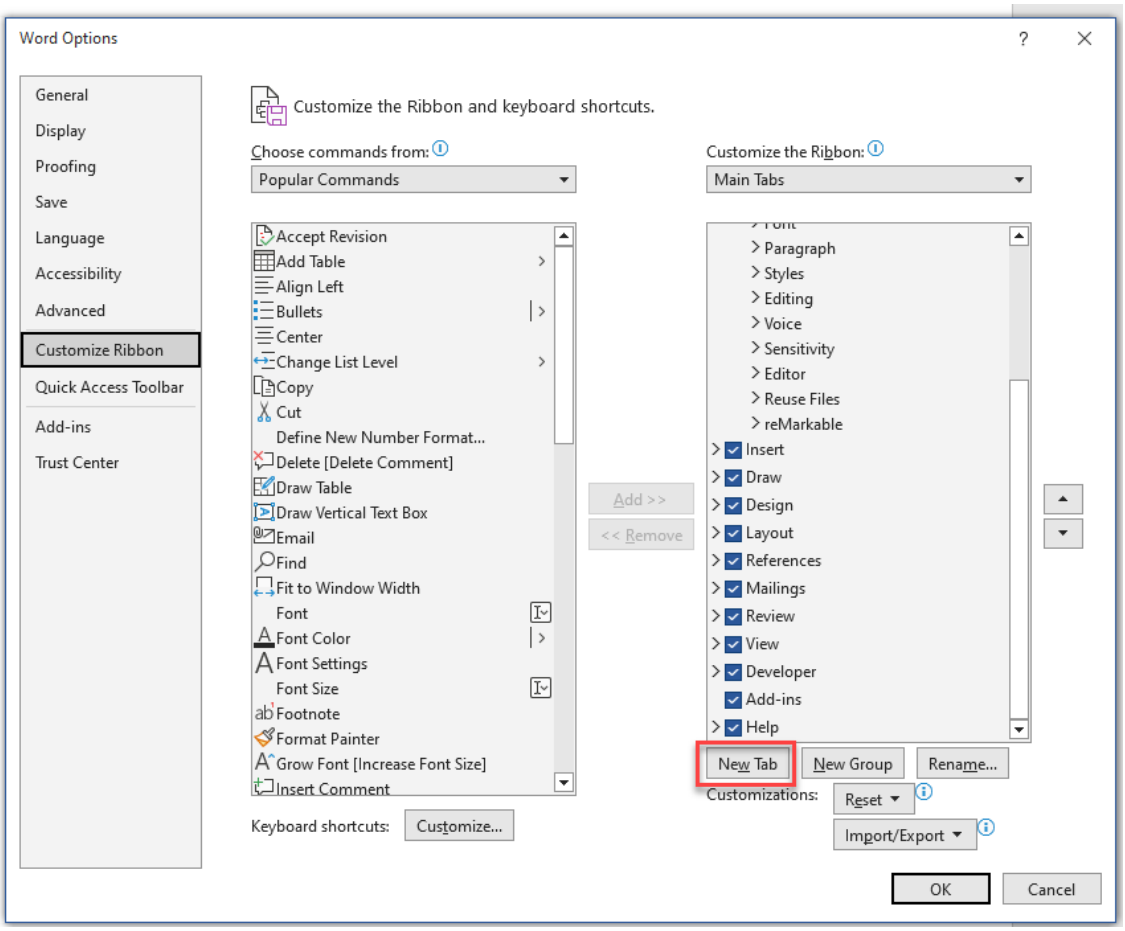
An alternative to using the QAT is to create a custom ribbon.

You can create these in a similar way to customising the QAT.

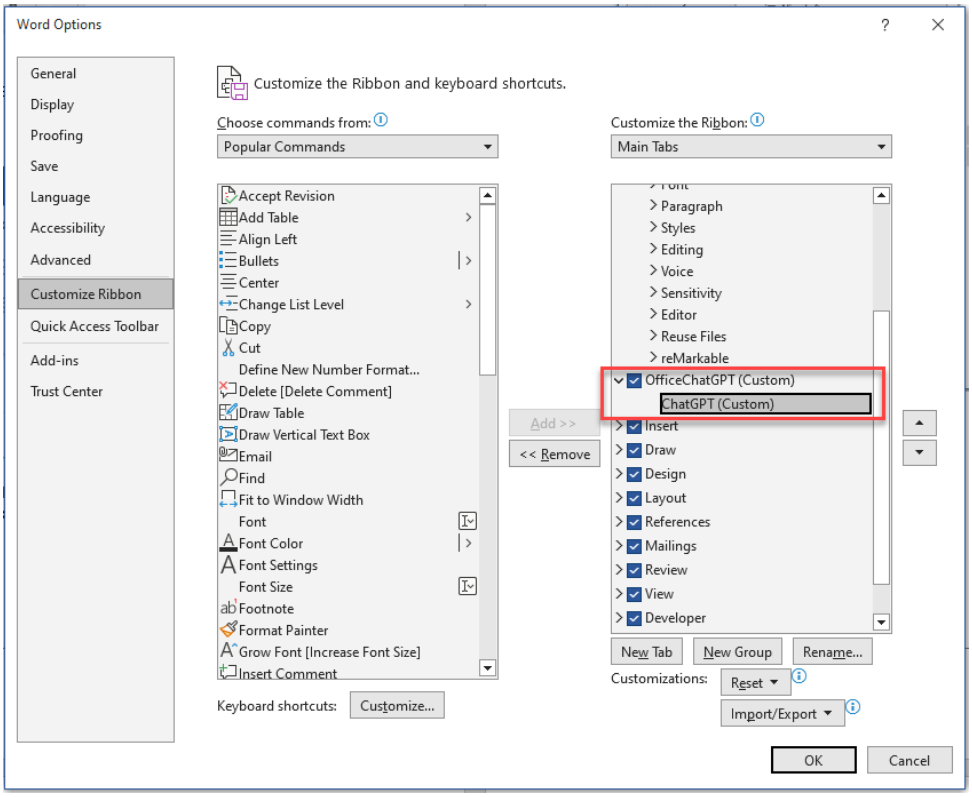
1. Open Excel, Word or Outlook then right-click on any ribbon and choose **Customize the Ribbon**. Each application would have its own custom ribbon.



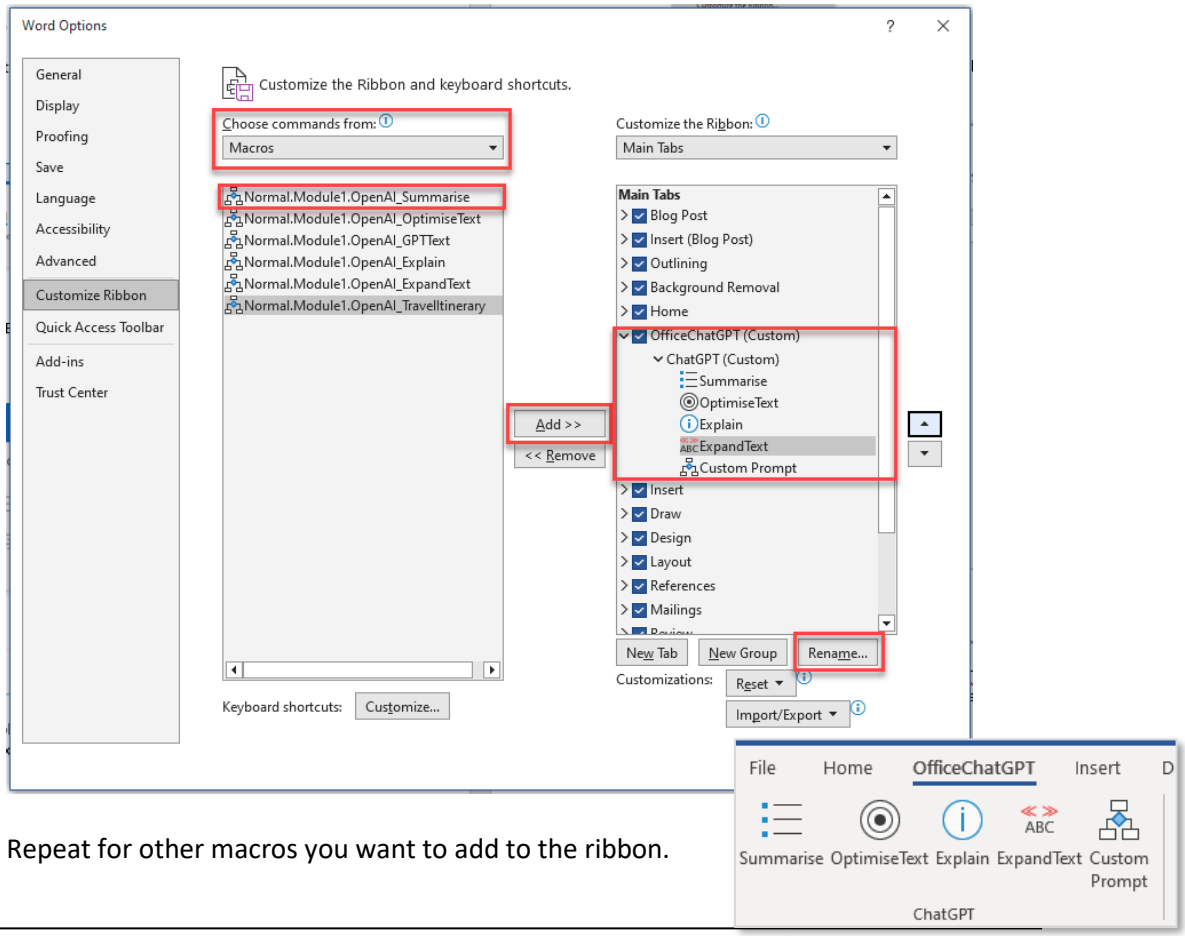
2. Click **New Tab**, then **Rename** (or right-click > Rename) & give the new ribbon a name e.g. OfficeChatGPT



3. Rename the group the same way e.g. ChatGPT



4. Choose Macros and select the macro you want to add. Click Add, then Rename to type a friendly name and choose an icon.



5. Repeat for other macros you want to add to the ribbon.

Built-in Prompts

EXCEL

Macro Name	Description	Usage
OpenAI_Complete	Uses the text or formula result in the currently active cell as a prompt for ChatGPT. Add “as a table” for tabular results.	Select a single cell
OpenAI_ExplainFormula	Passes the formula from the currently active cell to ChatGPT, which returns an explanation of what the formula is doing.	Select a single cell
OpenAI_AnalyseData	Passes the values from the selected range to ChatGPT. ChatGPT returns its analysis of the trends it observes and tries to guess why these occurred.	Select a range of cells
OpenAI_FormatFormula	Passes the formula from the currently active cell to ChatGPT, which returns a reformatted version of the formula that is indented and split over multiple lines	Select a single cell
OpenAI_OptimiseFormula	Passes the formula from the currently active cell to ChatGPT, which returns an optimised, re-written version of the formula.	Select a single cell
OpenAI_WriteFormula	Uses the address of the selected cells to write the formula specified by the user. <range> = currently selected cells	Select a range of cells
OpenAI_ForecastData	Produces a forecast for the number of future periods specified by the user, using the currently selected values	Select a range of cells
OpenAI_WritePrompt	Combines the text from a cell containing a ChatGPT prompt plus data from the currently selected cells to create a custom ChatGPT prompt. ChatGPT returns its results based on the user’s prompt. Include **as a table** in your prompt to get the results in rows and columns. Refer to all the values in your selected cells as **<range>**	1. Select a range of cells with data to analyse. 2. Run the macro then click the cell with your prompt.

All ChatGPT results are returned to a new sheet called “Results”.

WORD

Macro Name	Description	Usage
OpenAI_ExpandText	Write an expanded article about the text highlighted	Highlight some text
OpenAI_Explain	Explain the highlighted text in simple terms	Highlight some text
OpenAI_SummariseText	Summarise the highlighted text	Highlight some text
OpenAI_OptimiseText	Re-write the highlighted text and optimise the language	Highlight some text
OpenAI_GPTText	Write a custom prompt <text> = currently highlighted text	Highlight some text

All ChatGPT results are returned in a new document and displayed in your default language.

OUTLOOK

Macro Name	Description	Usage
OpenAI_AcknowledgeEmail	Generate an acknowledgement reply for all selected emails	Select 1 or more emails
OpenAI_ReplyYes	Generate a yes reply for all selected emails	Select 1 or more emails
OpenAI_ReplyNo	Generate a no reply for all selected emails	Select 1 or more emails
OpenAI_ReplyThanks	Generate a thank you reply for all selected emails	Select 1 or more emails
OpenAI_Explain	Get ChatGPT to explain the currently selected text	Select some text in an email
OpenAI_Reword	Re-write the highlighted text and optimise the language	Select some text in an email

All ChatGPT results are returned in a new email and displayed in the language specified in the VBA code.

```
'=====================================================================
' CREATE YOUR API KEY: https://platform.openai.com/account/api-keys
'=====================================================================
' Constants for API endpoint and request properties
Const API_ENDPOINT As String = "https://api.openai.com/v1/completions"
Const MODEL As String = "text-davinci-003"
Const MAX_TOKENS As String = "1024"
Const TEMPERATURE As String = "0.5"
Const MAX_LENGTH As Integer = 3800
Const TONE As String = "friendly"

' App name for Windows Registry
Const APP_NAME = "ChatGPTOffice"

' Default custom prompt if none has been entered
Const DEFAULT_CUSTOM_PROMPT = "Summarize this for me <text>"

' Set language
Const LANGUAGE = "English (Australia)"

Dim gCustomPrompt As String 'global custom prompt the user has entered
Dim MY_NAME As String
```

Adding your own Prompts

Depending on your role and how you use Word, Excel and Outlook, there might be other things you regularly want ChatGPT to do for you.

It's easy to add as many of your own extra prompts as you like and to link these to new buttons.

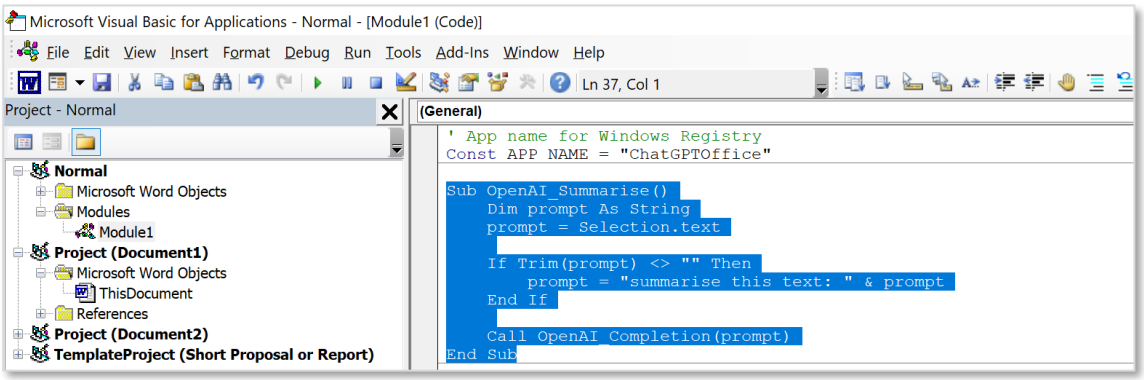
Just follow this process:

- Copy an existing OpenAI_xxxxx Sub
- Paste this below the existing one and give the new Sub a new name
- Change the prompt to whatever you want
- Add a new icon to your QAT or custom ribbon and link this to your new Sub

For example, say I regularly create 7-day travel itineraries for my customers. I might want a button that does this based on the travel destination I've highlighted in Word.

The process would be:

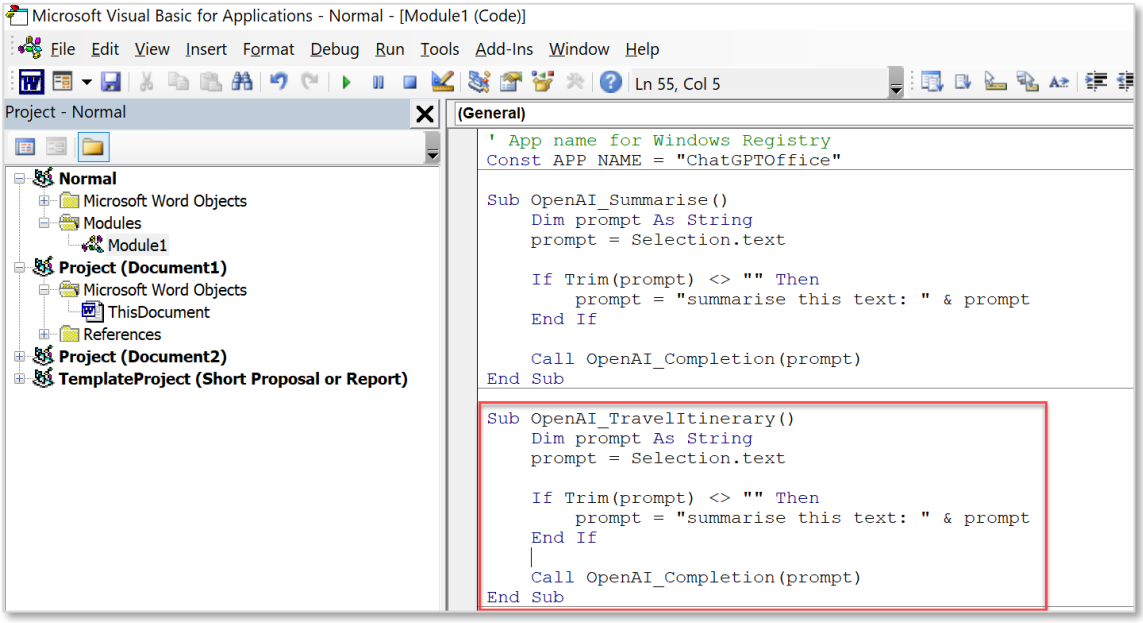
- In Word, go to **Developer > Visual Basic**
- Select one of the OpenAI_xxxxx macros. In the example below, we've just used the first one: OpenAI_Summarise



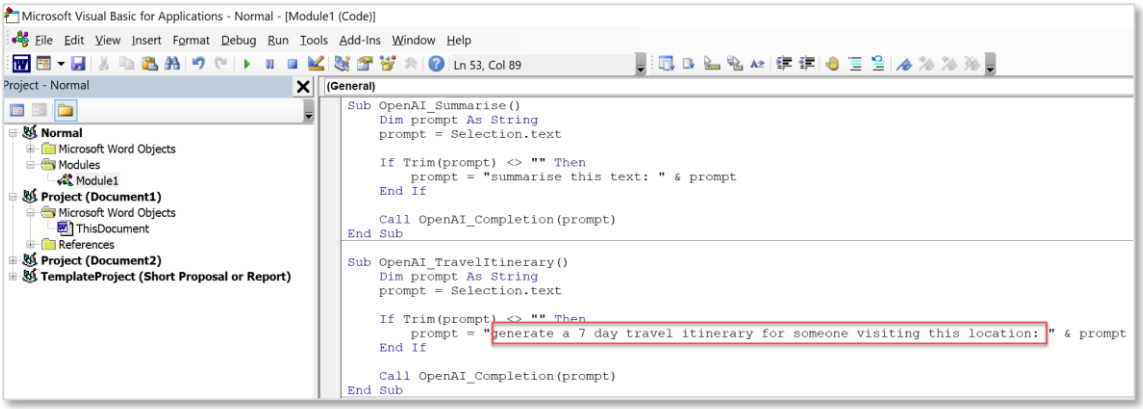
- Copy this, scroll to the bottom of the code and paste this below the comments that say "Paste your custom macros below this section". Your macros will work, no matter where you put them. But, if you paste them below this line, it'll be easier for you to upgrade to new versions in future yet retain your custom prompts.

```
'###############################################################################################
'##  Paste your custom macros below this section
'###############################################################################################
```

- Replace **Summarise** with **TravelItinerary**. At the moment, it is the same as OpenAI_Summarise except for the name.



- As you can see, this macro uses whatever text has been selected in your Word document and prefixes this with “summarise this text: “.
- Change the prompt to “generate a 7 day travel itinerary for someone visiting this location: “



- Close the Visual Basic Editor and go back to Word. Customize the QAT and add a new button that links to your new OpenAI_TravelItinerary macro. Test it out!
- If you want to make it a bit more flexible, you could add Input boxes that ask how many days the trip should be and what kinds of things the traveler likes to do, then incorporate these into the prompt. The new macro is shown below.

```
Sub OpenAI_TravelItinerary()
    Dim prompt As String
    Dim TripLength As String
    Dim Interests As String

    prompt = Selection.text

    TripLength = InputBox("How many days should the trip be?", "Trip Length", "7")
    Interests = InputBox("What kinds of activities does the traveler enjoy?",
"Interests", "hiking, mountain biking, skiing")

    If Trim(prompt) <> "" Then
        prompt = "generate a " & TripLength & " day travel itinerary for someone who has
these interests: " & Interests & " and will be visiting this location: " & prompt
    End If

    Call OpenAI_Completion(prompt)
End Sub
```

When I highlighted “Australia” and ran this macro, specifying a 14-day trip for someone with the default interests, ChatGPT’s response was:

> *Day 1: Arrive in Sydney and explore the city.*
>
> *Day 2: Take a day trip to the Blue Mountains and go hiking.*
>
> *Day 3: Take a mountain biking tour of the Royal National Park.*
>
> *Day 4: Spend the day skiing at Perisher Resort.*
>
> *Day 5: Drive to Canberra and explore the city.*
>
> *Day 6: Take a day trip to the Snowy Mountains and go skiing.*
>
> *Day 7: Drive to Melbourne and explore the city.*
>
> *Day 8: Take a day trip to the Grampians National Park and go hiking.*
>
> *Day 9: Drive to Adelaide and explore the city.*
>
> *Day 10: Take a mountain biking tour of the Flinders Ranges.*
>
> *Day 11: Drive to Alice Springs and explore the city.*
>
> *Day 12: Take a day trip to the West MacDonnell Ranges and go hiking.*
>
> *Day 13: Take a mountain biking tour of the Red Centre.*
>
> *Day 14: Depart Australia.*

Not bad! This would all be possible (assuming it’s winter) but it would be a very full-on trip so personally, I’d suggest doing a bit less or taking a bit longer.

Note: don’t forget to visit Perth too!! But come in spring (Sept/Oct) as it’s the best time of year!

Installing a New Version

To install a new version, for example, in Word:

- Open Word
- Go to Developer > Visual Basic and choose Normal > Modules > Module1
- Copy all the existing code (Ctrl+A) and paste this into a text file using Notepad or similar.
- Save the text file e.g. Word Backup.txt
- Open the new Word.txt file you've received
- Select all the code from Word.txt (Ctrl+A) and copy this.
- Select all the code in Modul1 above this line

```
'###############################################################################
'##  Paste your custom macros below this section
'###############################################################################
```

- Paste the new code into Module1
- If anything goes wrong, copy all the code from your Word Backup.txt file and overwrite everything in Module1, then try again.

Provided all your custom prompts (i.e. macros) are below "Paste your custom macros below this section", you'll be able to access the new code whilst still retaining your existing custom prompts (if you have any).

Repeat this process for Excel and Outlook.

FAQ

Q: I'm getting a 429 Error. What does this mean?

You've run out of free ChatGPT prompts.

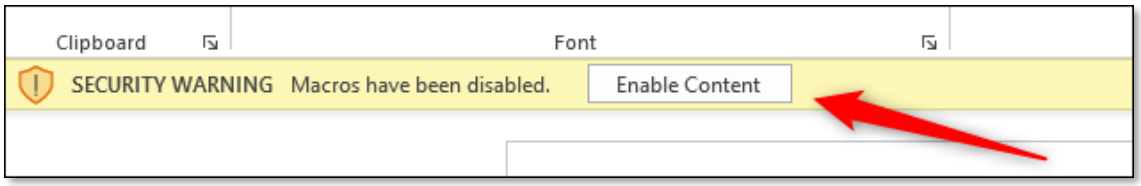
You need to go into ChatGPT and add a credit card to your account. You can specify the maximum monthly spend if you wish.

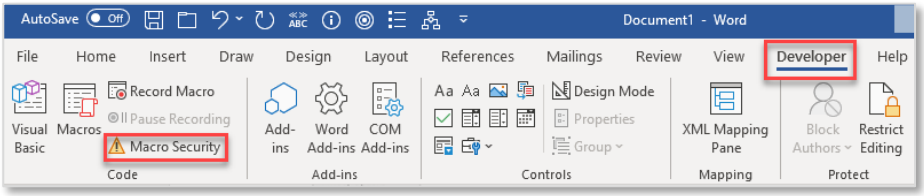
Q: How do I change my API Key

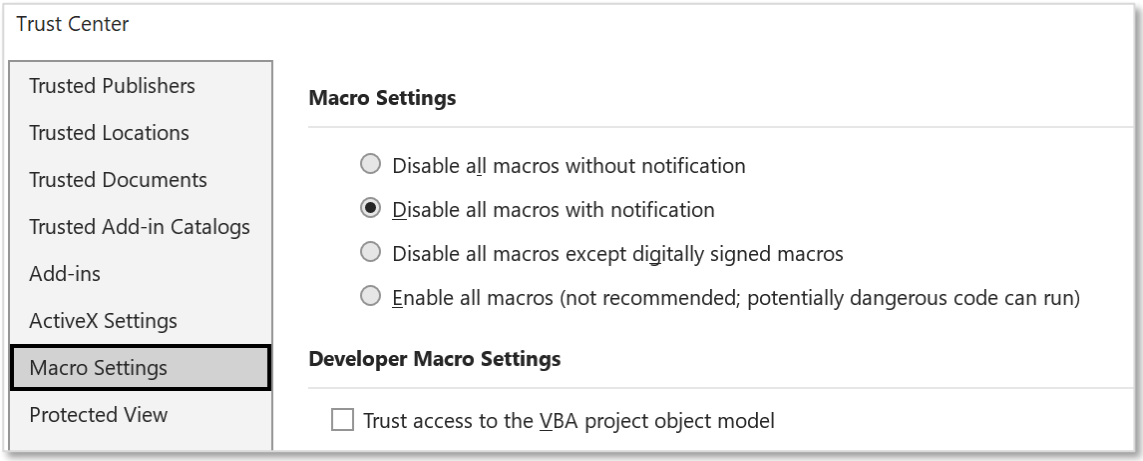
If you use the incorrect API Key or want to change it you'll need to open your Registry Editor (Windows button > type "reg" to find this) and replace the value at Computer\HKEY_CURRENT_USER\SOFTWARE\VB and VBA Program Settings\ChatGPTOffice\Settings\API_KEY

Q: Why don't my macros work in Excel or Word?

You need to adjust your Macro Security and may need to also click **Enable Content** if you see this:







Q: Why did all my macros disappear from Outlook?

Check your macro security settings are set to “Enable all macros” per above, then restart Outlook. Go to **Developer > Macro Security.** After you make the change, all your macros should return.

Q: I have confidential data. Is it OK to send this to ChatGPT with these macros?

NO! The same confidentiality guidelines should apply whether you’re using these macros or the ChatGPT interface itself.

Access Analytic Overview

OVERVIEW

Access Analytic provides AMAZING Power BI and Excel solutions to enable companies to grow, control their costs and reduce their risks.

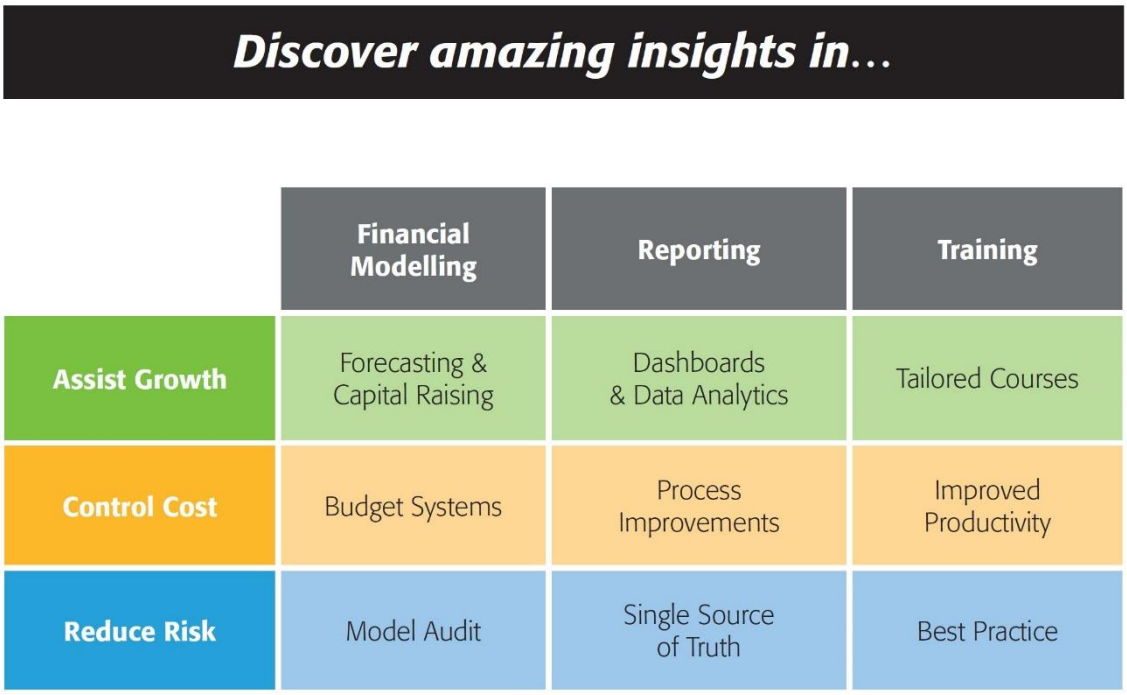


Figure 1: Access Analytic Solutions Overview

Our Services fall into three groups:

1. **Helping Companies Grow**:
    - **Financial Modelling**: to forecast results (e.g. equity/loan capital raising, business planning, feasibility studies, project economics etc.) with sensitivity and scenario analysis to support decision-making with confidence.
    - **Reporting**: tailored dashboards and KPIs using Excel and Power BI to connect to both cloud and on-premise data, thereby allowing companies to keep on top of their operations, gain insights, and make data-driven decisions.
    - **Training**: training in all of these areas to transfer skills to support further growth.
2. **Helping Companies Control Cost**
    - **Financial Modelling**: Excel-based budgeting and forecasting systems that enable companies to efficiently control and monitor their costs.
    - **Reporting**: reporting to assist Finance, Human Resources and Operations with their areas of responsibility for process improvement and cost control.
    - **Training**: assisting staff to become more productive and reduce the need for additional resources. Courses are provided on an in-house basis, which often results in a cost saving of 50% or more compared to public courses.

3. **Helping Companies Reduce Risk**

- **Financial Modelling**: independent model auditing services to provide assurance that key models are producing accurate results and can be relied upon.
- **Reporting**: reporting that focuses on the right data at the right time to provide transparency & visibility from a single source of truth.
- **Training**: financial modelling best practices to reduce risk and improve quality.

We are based in Perth, Western Australia and the business was established in 2000.

Access Analytic is a listed provider under the Western Australian Government's Common Use Agreement.

Access Analytic provides services to clients located in: Oceania, Asia, Africa and the Middle East. A selection of our clients is shown below:

GET IN TOUCH

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VBA CODE AUTHOR

Jeff Robson, Principal Business Analyst

Masters (Applied Finance), BCom (Accounting & Information Systems), CISA, GAICD, FAIM, F Fin, Microsoft Excel Expert

Jeff is the founding Director and Principal Business Analyst at Access Analytic Solutions. He has over 20 years' experience in chartered accounting, business management and consulting.

Jeff holds a Masters in Applied Finance and is a Certified Information Systems Auditor. He is highly regarded and recognised around the world as an expert in the field of financial modelling.

His achievements have been recognised by his peers and he is a Fellow of both the Financial Services Institute of Australasia and the Australian Institute of Management.

Jeff has extensive experience in best practice financial modelling, management reporting, business analysis, and spreadsheet auditing and is also an entertaining international presenter and trainer on these subjects.

LinkedIn

Package Contents

Files included:

File	Description
Excel.txt	VBA code to be copied into Module1 of your Personal Workbook
Outlook.txt	VBA code to be copied into Module1
Word.txt	VBA code to be copied into Module1 of your Normal template
ReadMe.pdf	This file

Change Log

Version 20230801

Updated non GPT buttons to clean up toolbar and retain most useful ones.

Version 20230623

Documentation

- Updated the disclaimer to specifically warn against using the code for calculations in Excel.
- Added privacy notice in accordance with OpenAI's privacy policies.

All Applications

- Updated the code to split the ChatGPT response more accurately.
- Added code to detect a 429 error and instruct the user what they need to do to resolve this.
- Amended the maximum URL string length to 5,000

Outlook

- Amended response parsing of GetOpenAIResponse to insert <br/> instead of vbLf (assumes Outlook is using HTML responses).

Version 20230515

Excel

- Added the FormatFormula function & ability to specify whether OpenAI results are displayed in a single cell (code level).
- CSV results now remove commas from within numbers.

Word

- The code now remembers the previously written custom prompt.

Outlook

- The code now remembers the previously written custom prompt.

Version 20230514

Excel

- Changed the WritePrompt function to take the prompt from a cell selected by an inputbox rather than writing the prompt directly in the inputbox. This avoids the 255 character limit of inputboxes.
- The code now remembers the cell address previously used for the custom prompt.
- CSV results now have \n at the end of each line.
- OpenAI_Completion now checks whether the results contain "|" and if so, use this as the delimiter.
- If the lines are long, the column width is adjusted & textwrap applied.

Word

- Added language default and detection.

Outlook

- Added the ability to specify language (in VBA code).