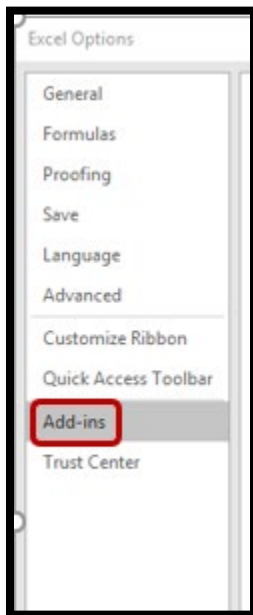# nVision Drill Down Add-In Installation Instructions

In order to drill down from the PeopleSoft nVision Summary Financials report, you will need to install an add-in for Excel. This can be done with your regular user id and password, and does not require administrator privileges.

You can obtain the file from the Finance System Downloads page on the Accounting Technology website and follow one of the methods for installation below.

If you have issues with installation and do not see the add-in tab within Excel, please contact Accounting Technology.

Method #1 - Load through Excel

1. Navigate to the Finance System Downloads page.

2. Click on the link for DrillToPIA.xla, and save the file locally to your PC in the downloads folder or on the desktop. Do not save the file to a network drive location.

3. Open Excel and make sure you have macros enabled. Click the File tab.

4. Select Options.

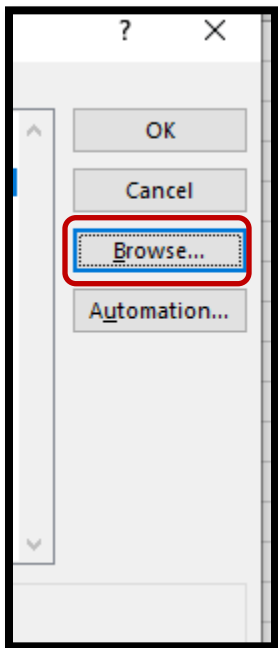5. Select Add-Ins from the list on the left-side bar.

6. At the bottom of the screen, make sure Excel Add-ins is in the dropdown and then select the **Go** button.
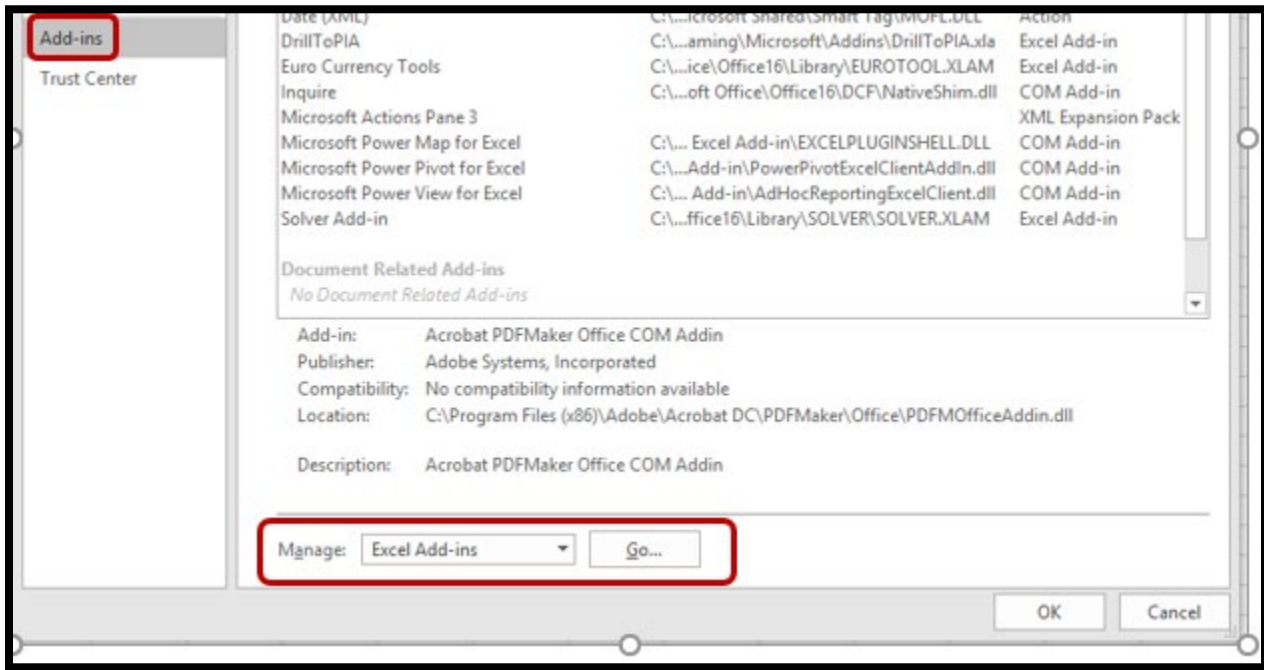
7. Select 'Browse' and find the location where you downloaded the drilldown file.

8. Select the 'DrilltoPIA' file and click OK
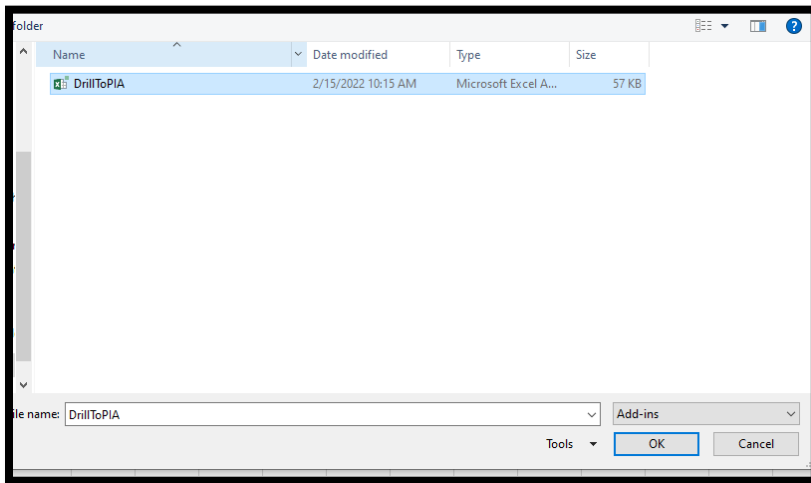
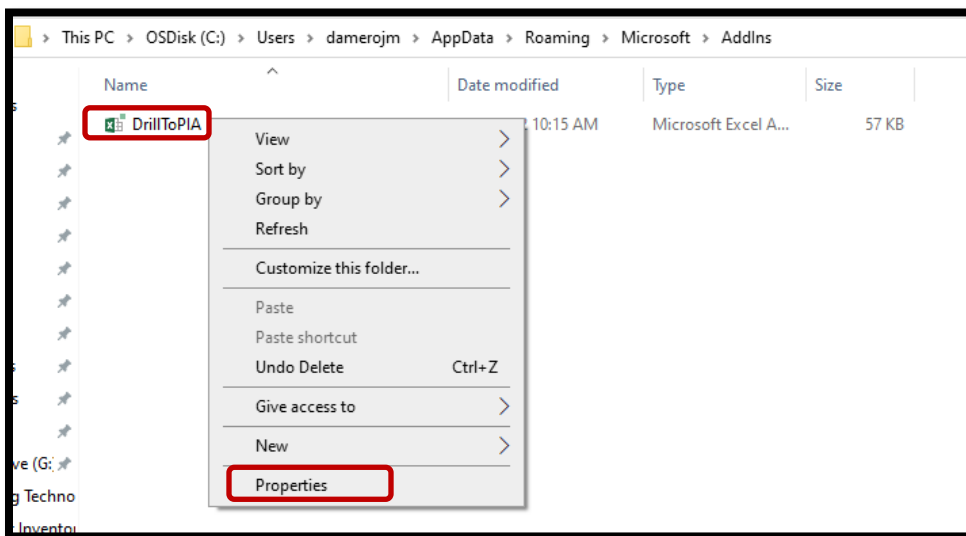9. You should now see DrillToPIA as an add-in available. Click on OK.
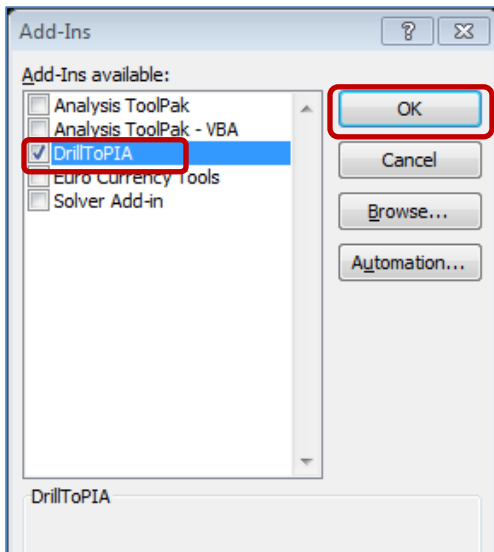
10. Shutdown excel and restart it.

11. A new menu option labeled 'Add-Ins' should now appear in the top ribbon of Excel. Clicking on that tab will show the nVision Drill option and allow you to use the functionality on a Summary Financials/nVision report.

   If you can access the tab and nVision Drill option as shown below, your installation is complete.
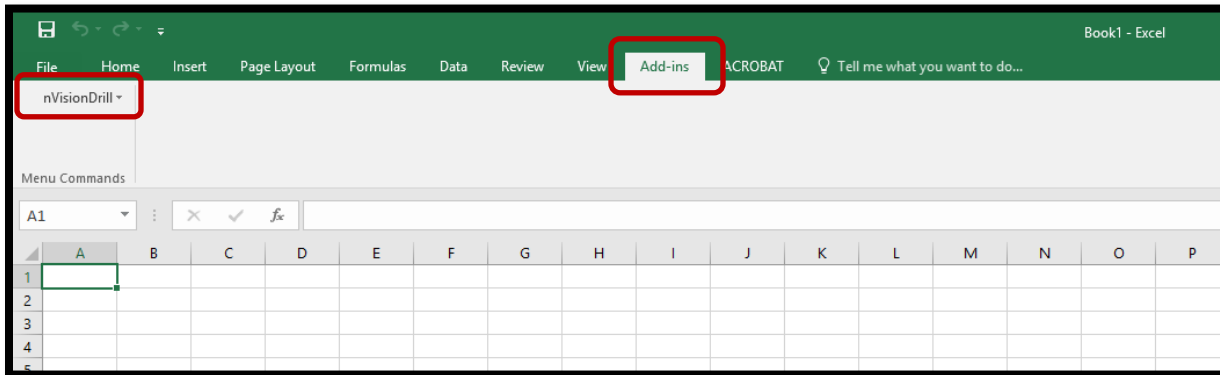
   If you do not see the Add-ins tab in the Ribbon, you may need to follow the next steps to 'unblock' PIA files depending on your system settings.
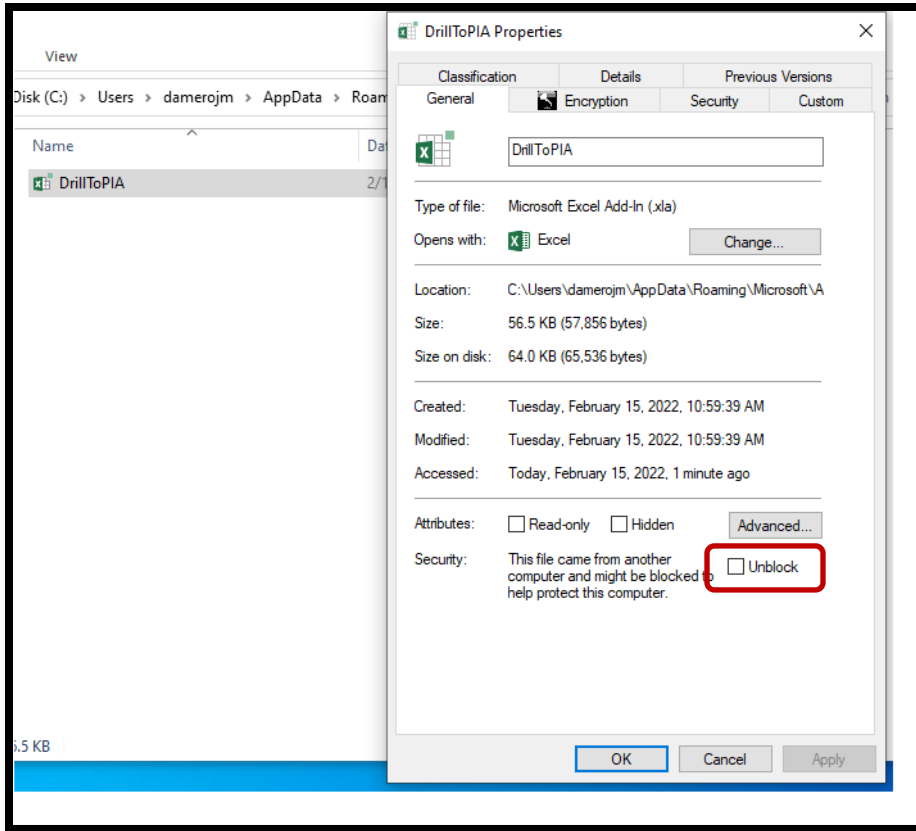
12. Open up Windows File Explorer and find your drilltopia.xla file again (same location as in steps 7 / 8).

13. Right click the file and select 'Properties'.

14. On the 'General' tab, look for a blank checkbox towards the bottom that says 'Unblock'.

    If you do not see the option for 'Unblock' then stop here and attempt installation Method #2 on the next page.

15. If you do see the checkbox, select it, click Apply, and then OK.

16. Shutdown Excel and restart it again. You should now see the Add-ins tab and nVisionDrill option.
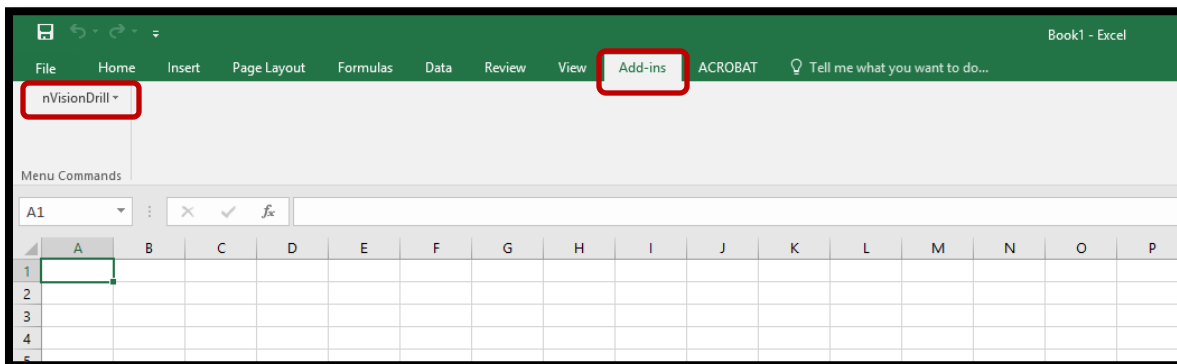
Method #2 - Load through File Explorer

1. Navigate to the [Finance System Downloads](#) page.

2. Click on the link for DrillToPIA.xla, and save the file locally to your PC in the downloads folder or on the desktop. Do not save the file to a network drive location.

3. Open Windows File Explorer and click into the address bar. You will have to be inside a folder location to be able to click into the address bar, and cannot be on Quick Access.
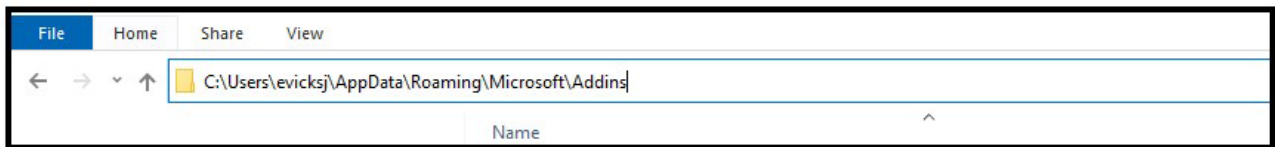
   Navigate to a saved folder location on the side bar, or through This PC -> C:\ to access the address bar.
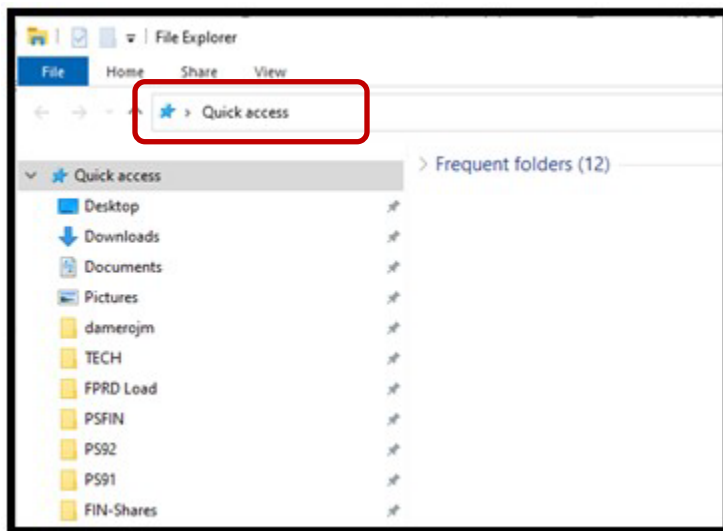
In the address bar, type the following path and substitute your eID for evicksj in the screenshot example below.

Hit Enter when done to navigate to this folder.
**C:\Users\eID\AppData\Roaming\Microsoft\Addins**

4. If there are no files inside the Microsoft/Addins folder, then proceed to step 5.
   If there is already a DrillToPIA.xla file in the folder, please delete it and then proceed to step 5.

5. Open a 2nd Windows File Explorer window and navigate to the folder location of the DrillToPIA.xla file that you downloaded.

6. Move the DrillToPIA.xla file into the Microsoft/Addins folder.

    This can be done by dragging the file from the window you opened in step 5, and dropping into the window you opened in step 3.

7. Close Windows file explorer.

8. Open Excel and make sure you have Macros enabled. Click the File tab.

9. Select Options.

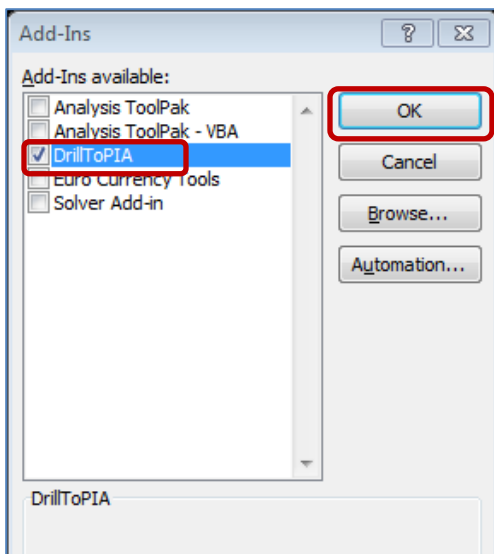10. Select Add-Ins from the list on the left-side bar.
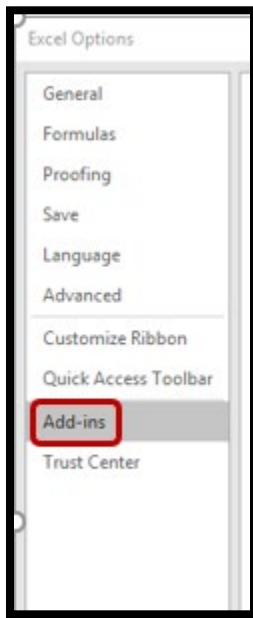
11. At the bottom of the screen, make sure Excel Add-ins is in the dropdown and then select the Go button.
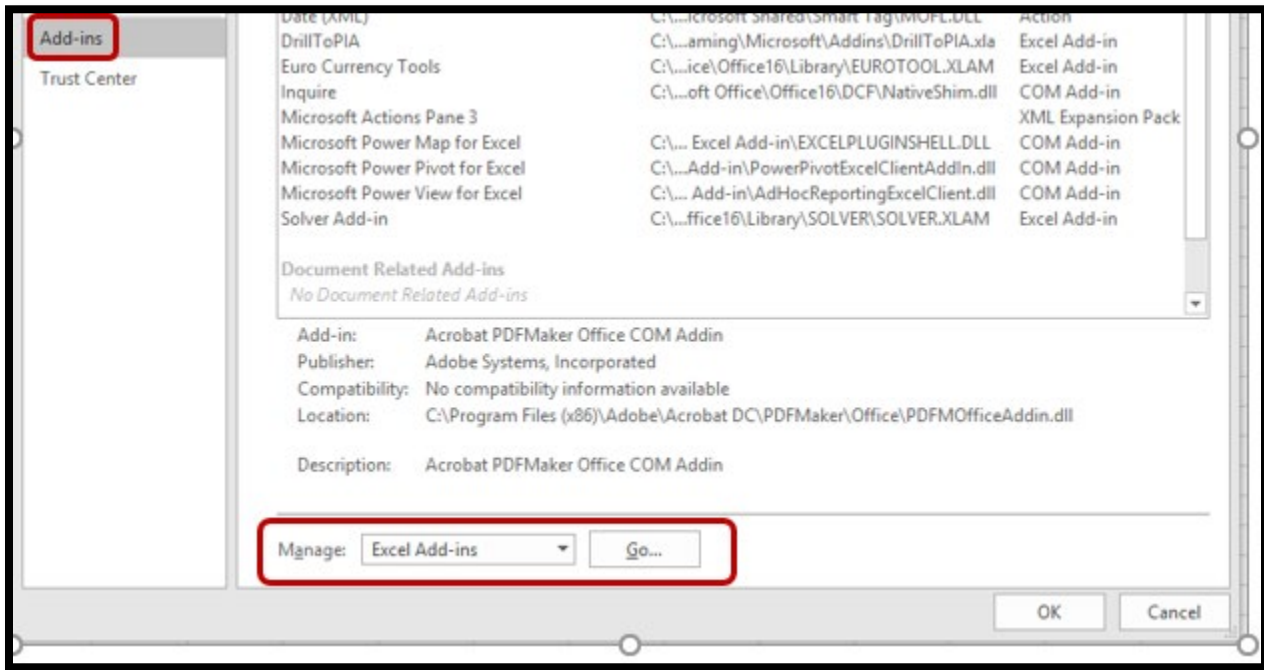
12. You should now see DrillToPIA as an add-in available, but unchecked.

    Select the checkbox and then click OK.
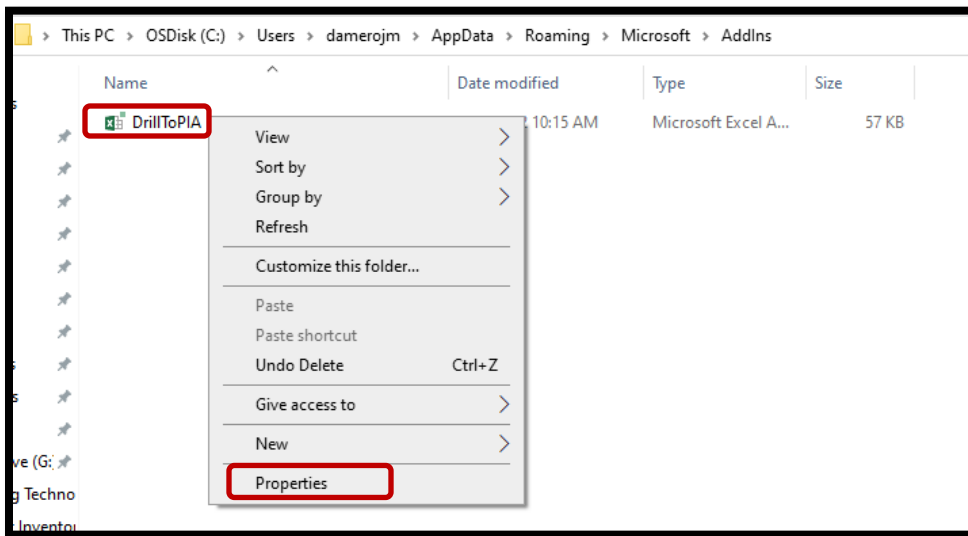
nVision Drill Down Add-In Installation Instructions

13. Shutdown excel and restart it.

14. A new menu option labeled '**Add-Ins'** should now appear in the top ribbon of Excel. Clicking on that tab will show the nVision Drill option and allow you to use the functionality on a Summary Financials/nVision report.

If you can access the tab and nVision Drill option as shown below, your installation is complete.
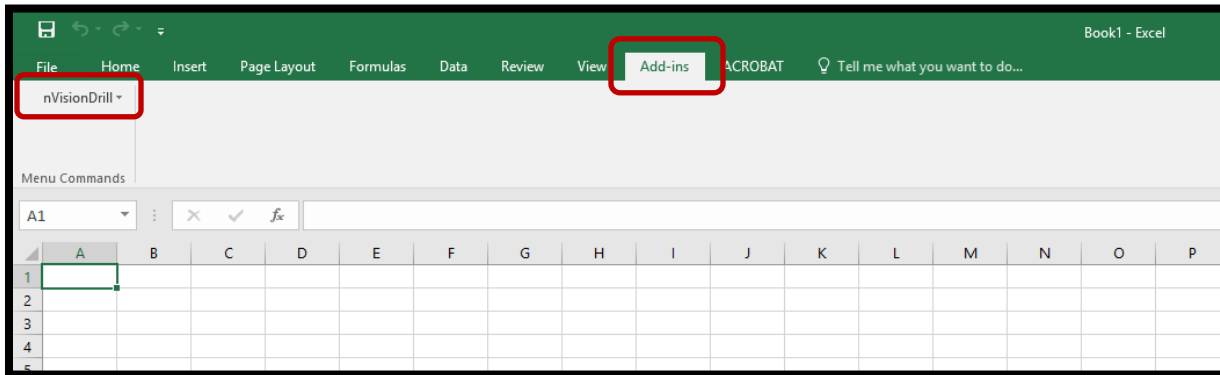

 If you do not see the Add-ins tab in the Ribbon, you may need to follow the next steps to 'unblock' PIA files depending on your system settings.

15. Open up Windows File Explorer and find your drilltopia.xla file again that was placed in the Addins folder.
    C:\Users\eID\AppData\Roaming\Microsoft\Addins

16. Right click the file and select 'Properties'.

17. On the 'General' tab, look for a blank checkbox at the bottom of the panel that says 'Unblock'.
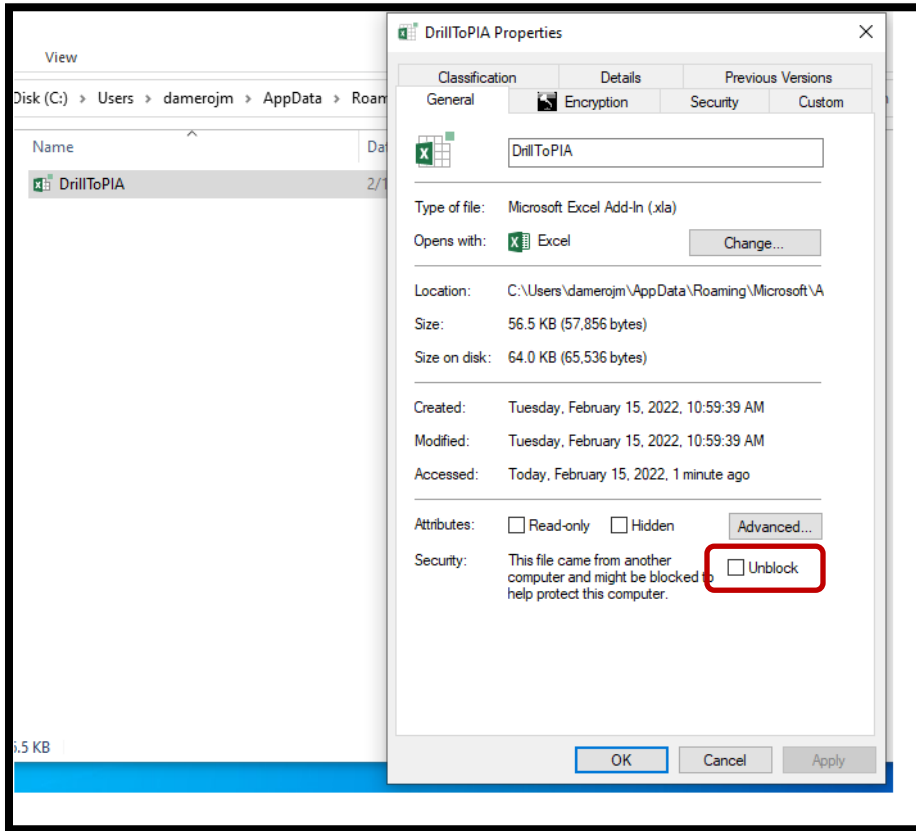
18. Select the checkbox, click Apply, and then OK.

19. Shutdown Excel and restart it again. You should now see the Add-ins tab and nVisionDrill option.