




ADDY NOTES



Excel 2013 Macro Installation Instructions

This Addy Note explains how to download and install the Excel Macro in order to be able to drill down to details on an UCF Financials nVision report. The Excel Macro is a mandatory installation to be able to drill down, and is not optional.

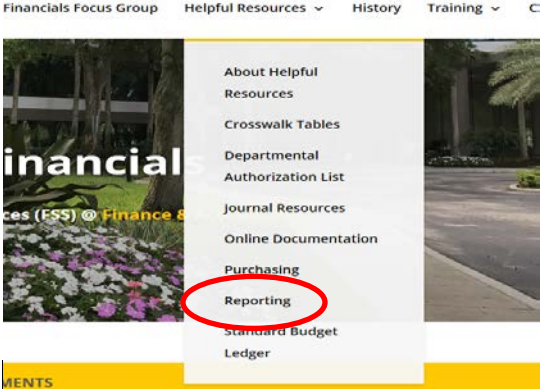
- You will only need to complete this installation once.
- For questions or concerns, please contact the Financials Support Services Help Desk at (407) 823-5117, option 6.

Step	Action
1.	<p>Navigate to the UCF Financials website and scroll over the Helpful Resources tab.</p> 



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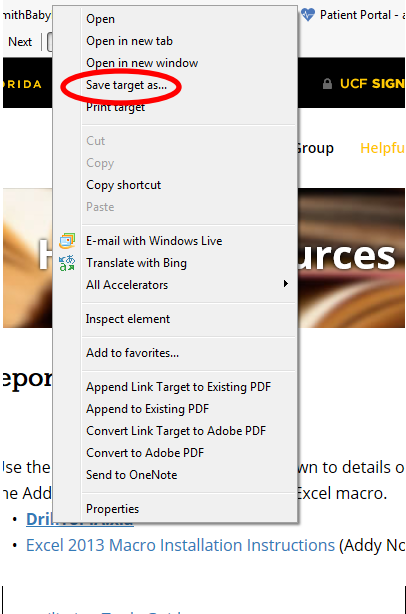


Step	Action
<p>2.</p>	<p>Select Reporting from the drop-down menu.</p>  <p>The screenshot shows the top navigation bar with 'Financials Focus Group', 'Helpful Resources', 'History', and 'Training'. A dropdown menu is open under 'Helpful Resources', listing items like 'About Helpful Resources', 'Crosswalk Tables', 'Departmental Authorization List', 'Journal Resources', 'Online Documentation', 'Purchasing', 'Reporting' (circled in red), 'Standard Budget', and 'Ledger'.</p>
<p>3.</p>	<p>Right click the DrillToPIA.xla file.</p> <ul style="list-style-type: none"> Use the below Excel macro file to drill down to details on an UCF Financials nVision report and the Addy Note for the installation of the Excel macro. <ul style="list-style-type: none"> DrillToPIA.xla Excel 2013 Macro Installation Instructions (Addy Note)



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Step	Action
4.	<p>Click “Save target as”.</p>  A screenshot of a web browser's context menu. The menu is open over a webpage, and the option "Save target as..." is circled in red. Other visible options include "Open", "Open in new tab", "Open in new window", "Print target", "Cut", "Copy", "Copy shortcut", "Paste", "E-mail with Windows Live", "Translate with Bing", "All Accelerators", "Inspect element", "Add to favorites...", "Append Link Target to Existing PDF", "Append to Existing PDF", "Convert Link Target to Adobe PDF", "Convert to Adobe PDF", "Send to OneNote", and "Properties". The background of the screenshot shows parts of a webpage with text like "withBaby", "Next", "RIDA", "Patient Portal", "UCF SIGN", "group", "Helpfu", "ources", "epor", "Use the", "ne Add", "• Dri", and "• Excel 2013 Macro Installation Instructions (Addy Nc)".



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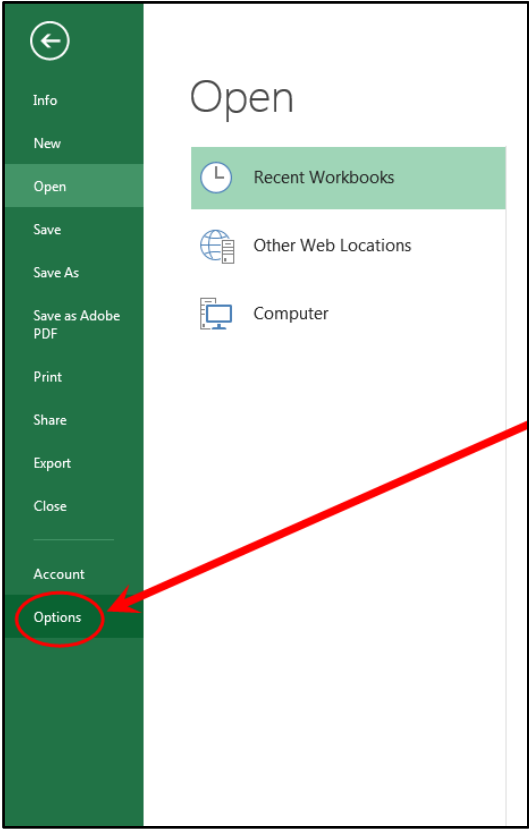


Step	Action
<p>5.</p>	<p>Change the file extension to “.xla” instead of “.xls”.</p> <p>Note: If “.xls” does not display, simply add “.xla” at the end of the filename.</p> <div data-bbox="493 659 1263 1276" data-label="Image"> </div> <p>Click Save.</p>
<p>6.</p>	<p>Open Excel 2013.</p>



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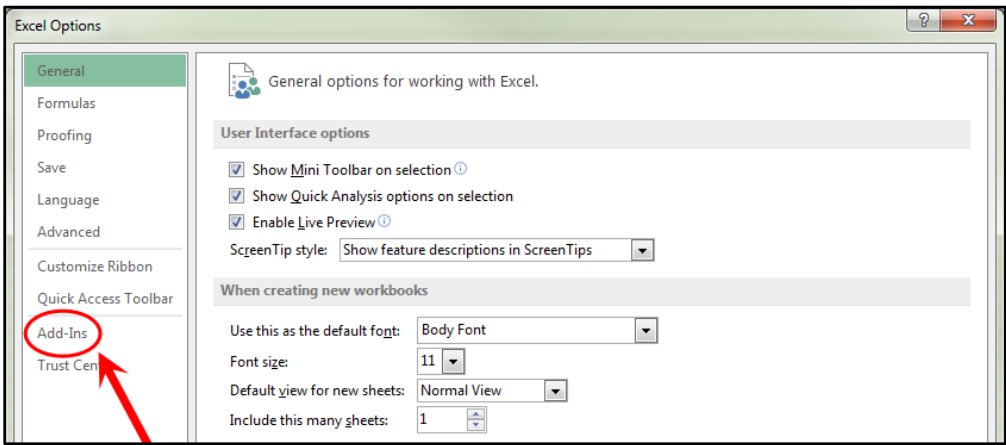


Step	Action
7.	<p>Click File > Options.</p> 



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Step	Action
8.	<p>Select Add-Ins.</p> 



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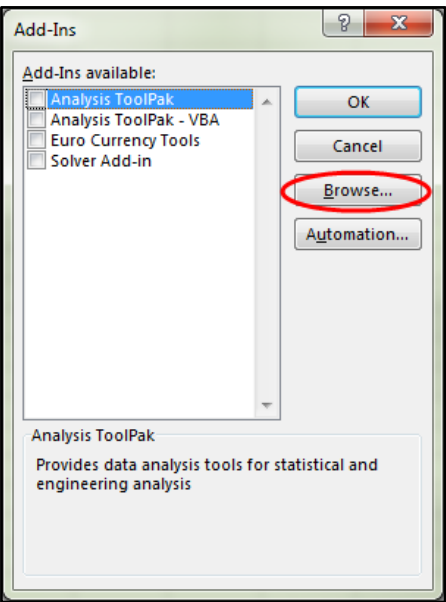
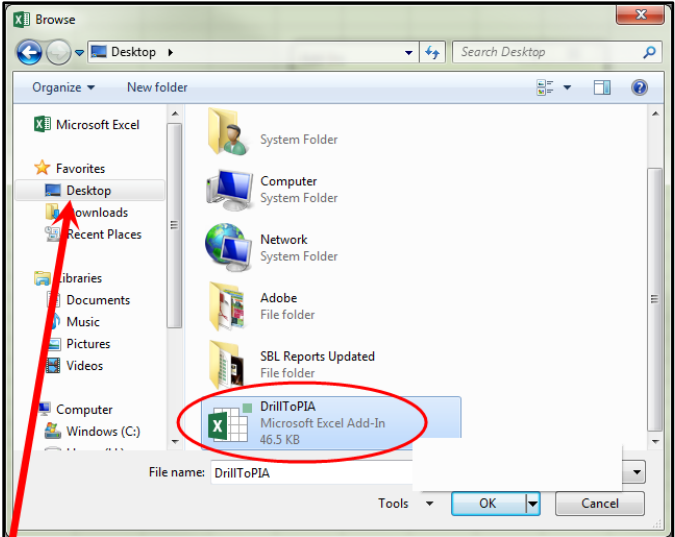


Step	Action
9.	<p>Select Excel Add-ins from the dropdown list, then click Go.</p> <p>The screenshot shows the 'Excel Options' dialog box with the 'Add-Ins' tab selected. The left sidebar has 'Add-Ins' circled in red. The main area shows a list of add-ins under 'Active Application Add-ins' and 'Inactive Application Add-ins'. At the bottom, the 'Manage:' dropdown is set to 'Excel Add-ins' and the 'Go...' button is highlighted with a red arrow.</p>



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Step	Action
<p>10.</p>	<p>Click Browse.</p> 
<p>11.</p>	<p>Select the location of the file you saved. In this example, we saved the file to the desktop. Click the file, and then click OK.</p> 



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Step	Action
12.	<p>You will now see DrillToPIA as an available Add-In. With the box selected, click OK.</p> <div data-bbox="613 611 1110 1276"></div>

This completes the macro installation process.