There are 2 setup tasks that you need to perform on your PC to enable you to open and drill on nVision reports.

Task 1: Install nVision Drill Down

There are two steps required to get your systems prepared to run drill downs on your nVision reports using PeopleSoft.

Step 1 – Download the DrillToPIA.xla file.

1. Right-click on the DrillToPia.xla file
2. When asked where to save the target or file select c:\ or c:\temp.
3. Click on OK

Step 2 – Add DrillToPIA into your excel software.

1. Open Excel
2. Click on Tools
3. Click on Add-Ins
4. Click on Browse
5. In the Look In Box – select the directory where you saved your DrillToPIA.xla file from step 1
6. Click on the DrillToPIA file
7. Click on OK
8. Click on OK
9. You should now see nVisionDrill in your toolbar within Excel.
10. Close Excel

Task 2: Excel Setup – Open report in excel not your browser

1. From your desktop - open "My Computer"
2. Click on Tools
3. Click on Folder Options
4. Click on the File Types tab
5. In the Registered File Types box scroll down until you see XLS Microsoft Excel Worksheet (hint – this listing is alphabetical so it will be down near the very bottom)
6. Click on XLS Microsoft Excel Worksheet in the Registered File Types box
7. Click on the Advanced button in the bottom right corner.

      a. If you cannot click this button, please submit a helpdesk ticket.
8. Remove any check marks from the following boxes:
      a. Confirm open after download
      b. Always show extension
      c. Browse in same window
9. Click on OK
10. Click on Close

You are now ready to open nVision reports and drill down to detail.