

#### DrillToPIA Excel Add-In for nVision Drilldown

The **DrillToPIA Add-In** for Excel must be applied to review detail within nVision reports generated in Cardinal.

This job aid was developed using the Microsoft Office 2016 version of Excel. Cardinal users who have computers configured with other versions of Microsoft Excel may encounter slightly different steps needed to load this add-in. Please consult your agency technical resources with any questions, and if needed, contact VITA at (866) 637-8482, or email the VITA Customer Care Center at [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov).

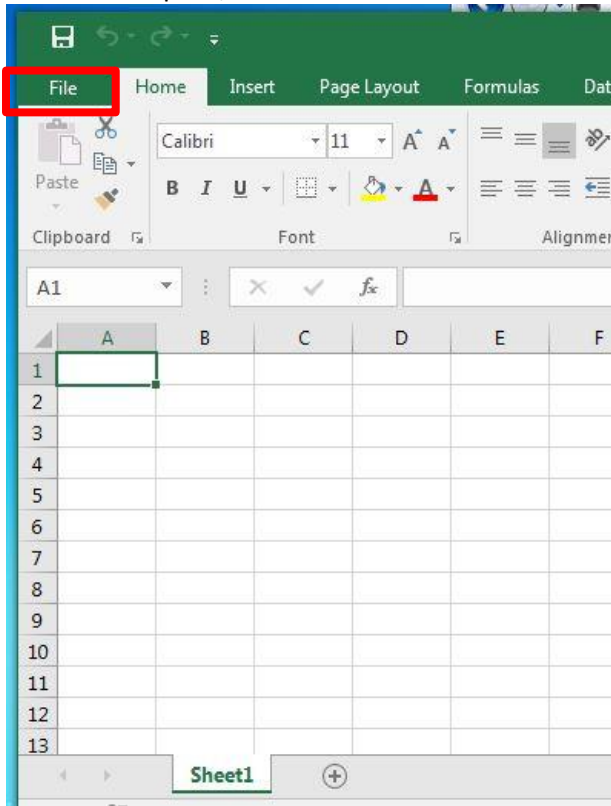
1. All users at VITA supported agencies will get the nVisions DrillToPIA Add-In installed with their copy of Office 2016. Downloading should be unnecessary. If you are at a VITA supported agency, begin with step 6.
2. Download and uncompress the attached Excel plug-in:



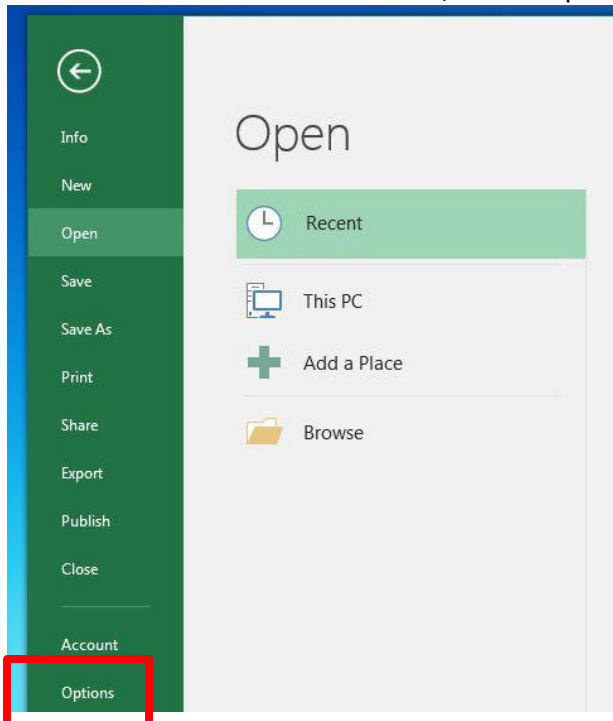
DrillToPIA-2016.zip

3. Install the add-in into Excel.
  - Non-VITA agencies: If you do not have administrative access to install software on your PC, you will need assistance from your IT department to accomplish this.
  - VITA agencies will already have the Add-In installed on their computer.
4. Copy the drillToPIA.xla file to the following location on your hard drive: C:\Program Files (x86)\Microsoft Office\Office 16\Library.
5. Once the file is saved in the Library folder launch Excel.

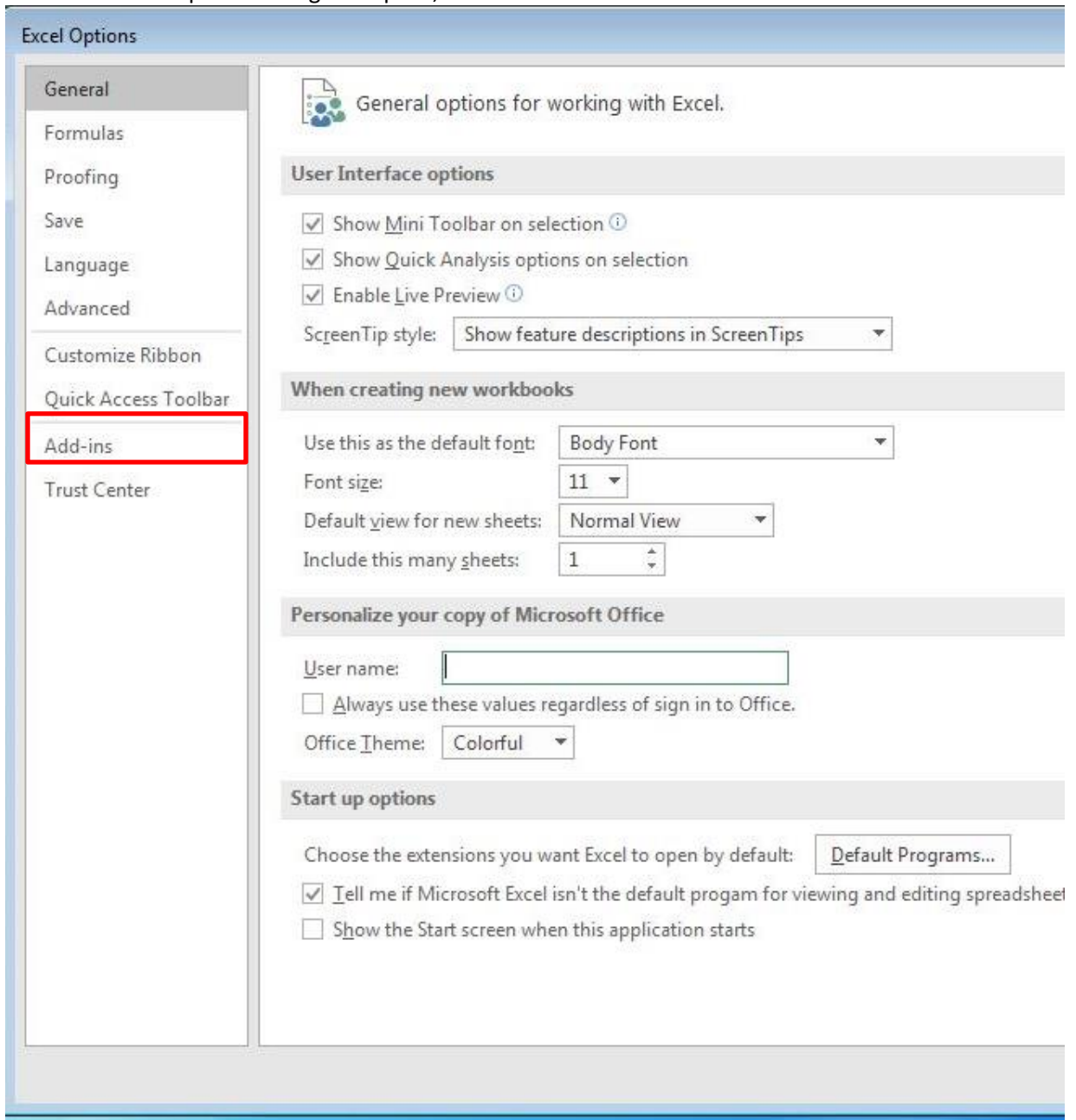
6. When Excel opens, click on the 'File' button in the upper left corner of your screen.



7. At the bottom of the left hand menu, select "Options".



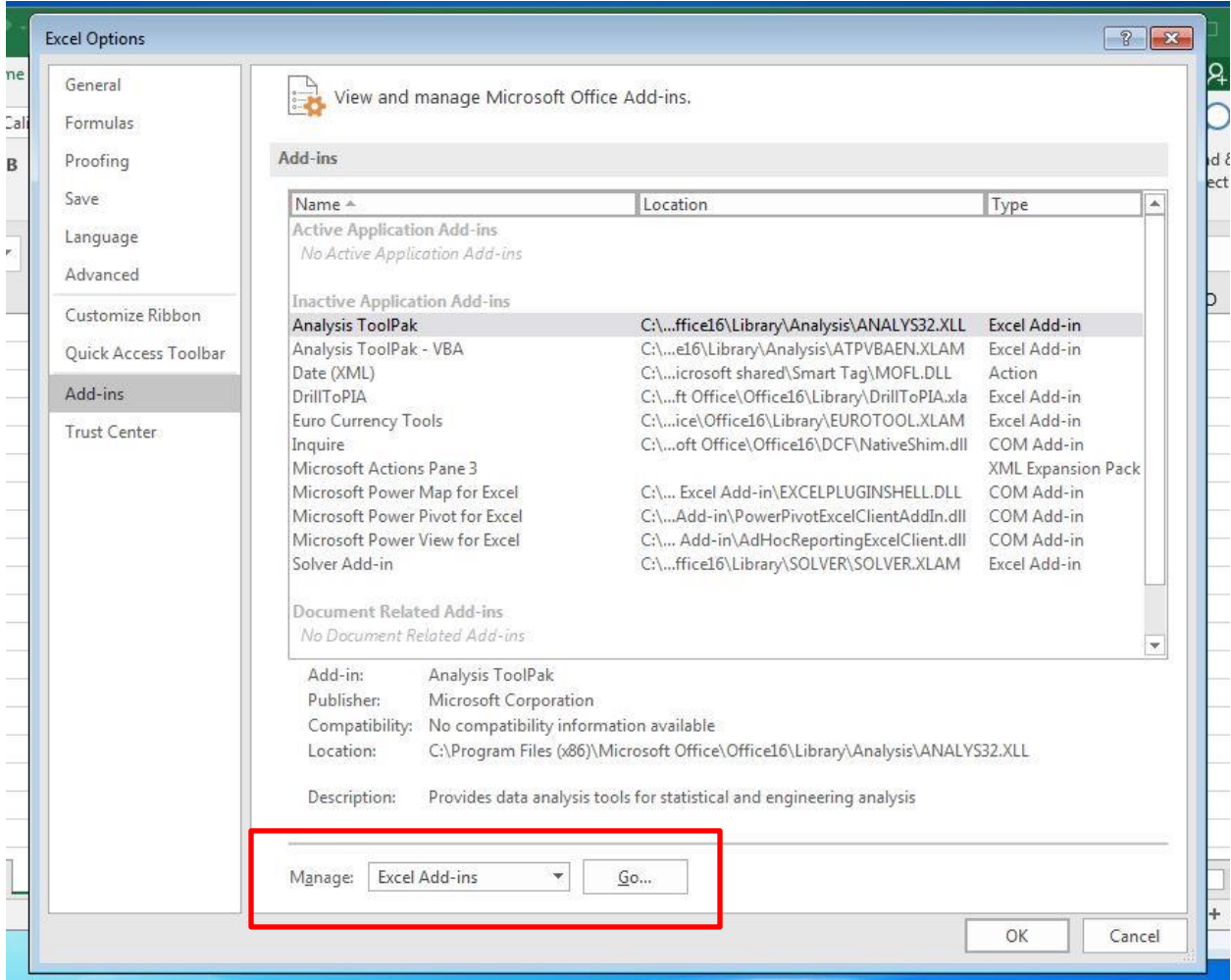
8. When the Excel Options dialog box opens, select “Add-Ins”



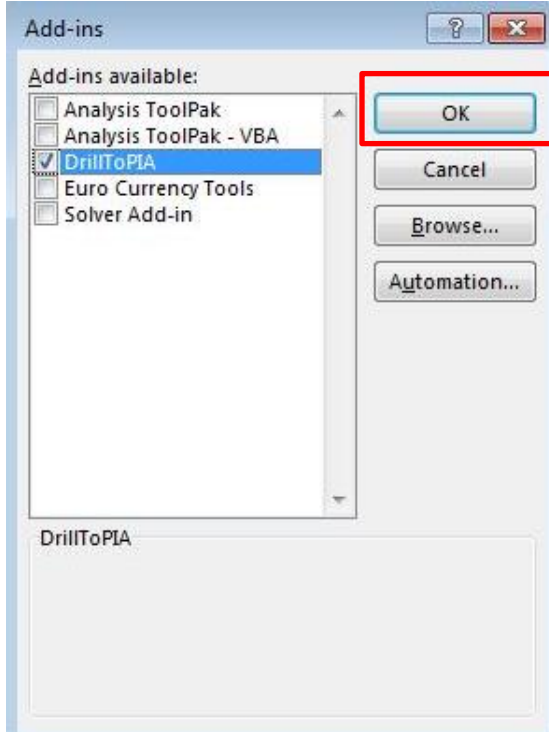
The screenshot shows the 'Excel Options' dialog box. The left-hand pane contains a list of categories: General, Formulas, Proofing, Save, Language, Advanced, Customize Ribbon, Quick Access Toolbar, **Add-ins** (highlighted with a red box), and Trust Center. The right-hand pane is titled 'General options for working with Excel.' and is divided into several sections: 'User Interface options' with checkboxes for 'Show Mini Toolbar on selection', 'Show Quick Analysis options on selection', and 'Enable Live Preview', and a 'ScreenTip style' dropdown set to 'Show feature descriptions in ScreenTips'; 'When creating new workbooks' with dropdowns for 'Body Font', '11' font size, 'Normal View', and a spinner for '1' sheet; 'Personalize your copy of Microsoft Office' with a 'User name' field, an unchecked checkbox for 'Always use these values regardless of sign in to Office.', and a 'Colorful' theme dropdown; and 'Start up options' with a 'Default Programs...' button, a checked checkbox for 'Tell me if Microsoft Excel isn't the default program for viewing and editing spreadsheet', and an unchecked checkbox for 'Show the Start screen when this application starts'.

### How to apply the Excel Add-In

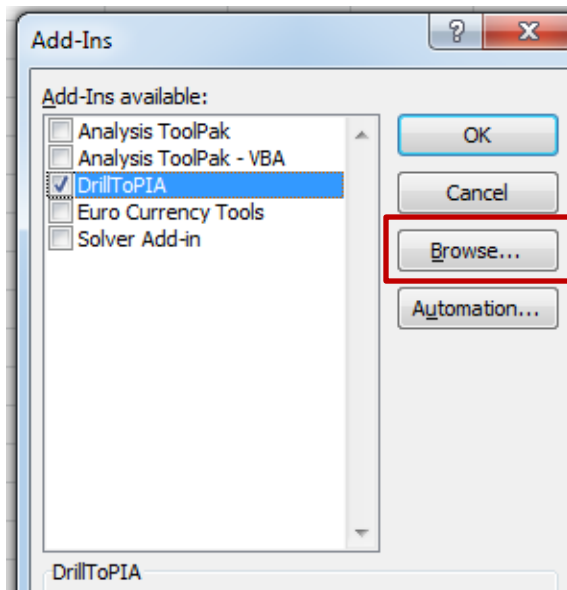
9. At the bottom of the right panel that appears for Add-Ins, next to Manage, ensure that 'Excel Add-Ins' is selected in the dropdown and click Go.



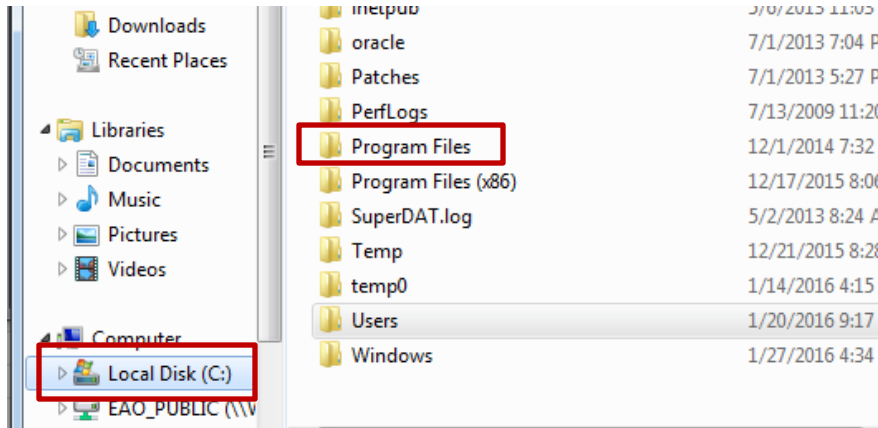
10. The “DrillToPIA” Add-In should be visible in the list. Select it and click ‘OK’. Skip to step 17 if the DrillToPIA option is available and you were able to select it.



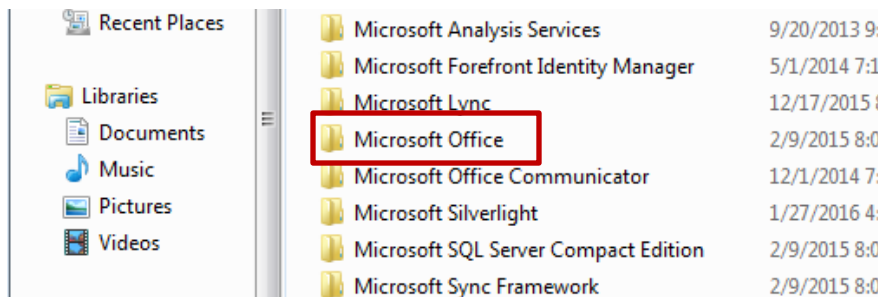
11. If drillToPIA is not available in the list, click Browse



12. Click on the Local Disk (C:) and then on Program Files (x86)

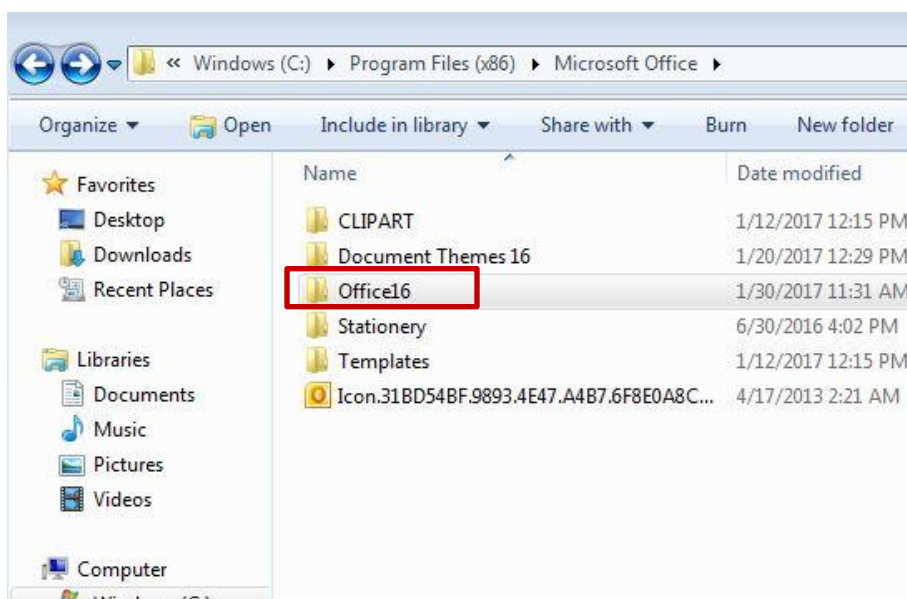


13. Click on Microsoft Office

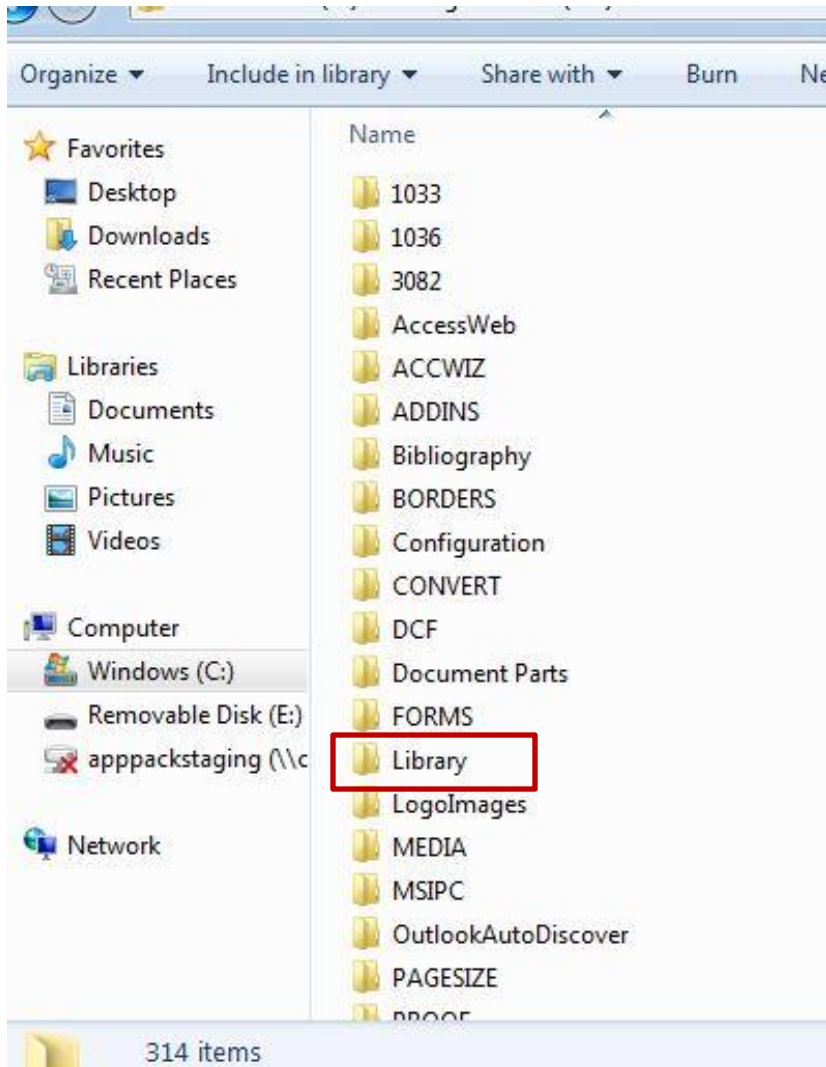


14. Click on Office16

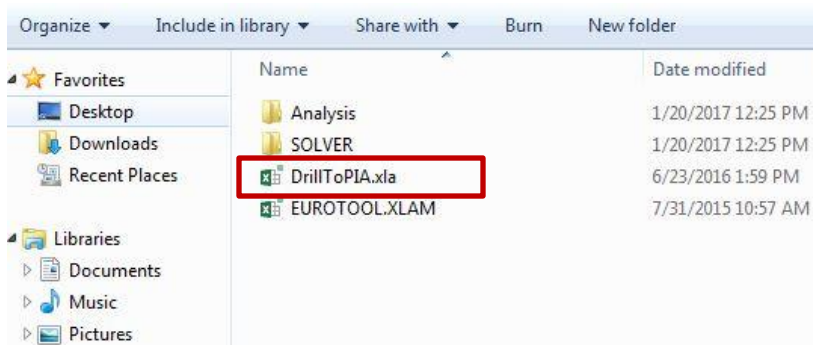
- Note: If you are using a previous version of Office, This step may require you to select Office12 or Office14



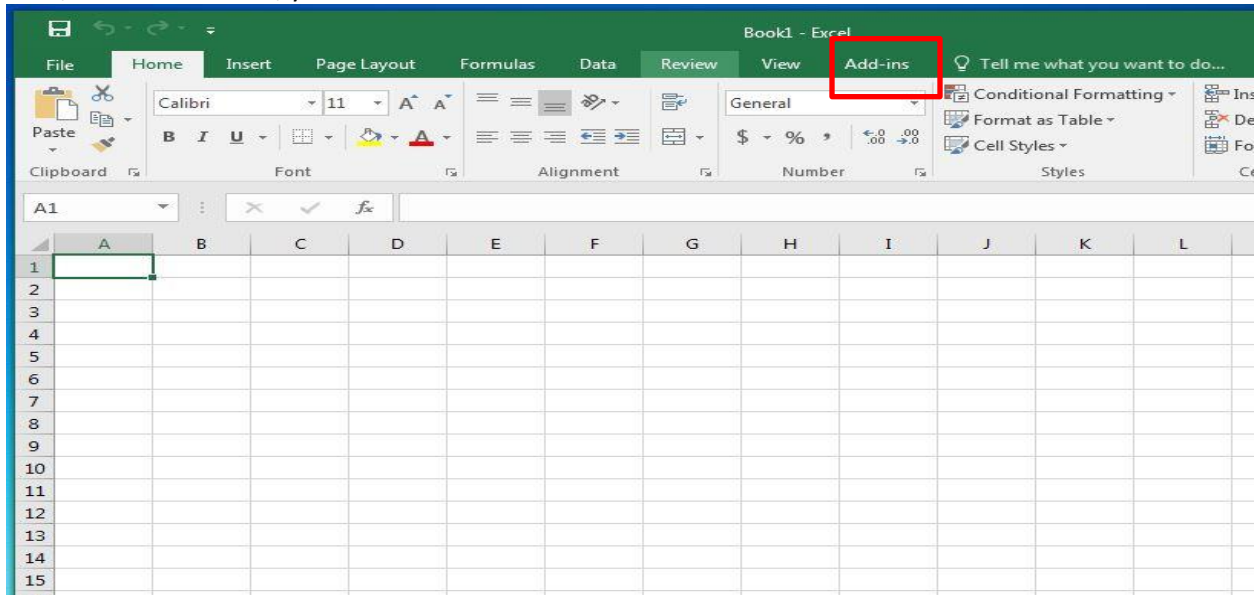
15. Click on Library



16. Select DrilltoPIA.xla and click Open ( or Double Click DrillToPIA)



17. Now, on the Menu bar, you should have the “Add-Ins” tab visible.



18. If you click on the Add-ins tab, you will see nVisionDrill available.

