PeopleSoft 9.2 PeopleTools v8.53
Excel nVision Drill Down

Board of Regents
University System of Georgia
Office of Information Technology Services

GEORGIA*FIRST*
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
A Project of the University System of Georgia

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Excel nVision Drill Down

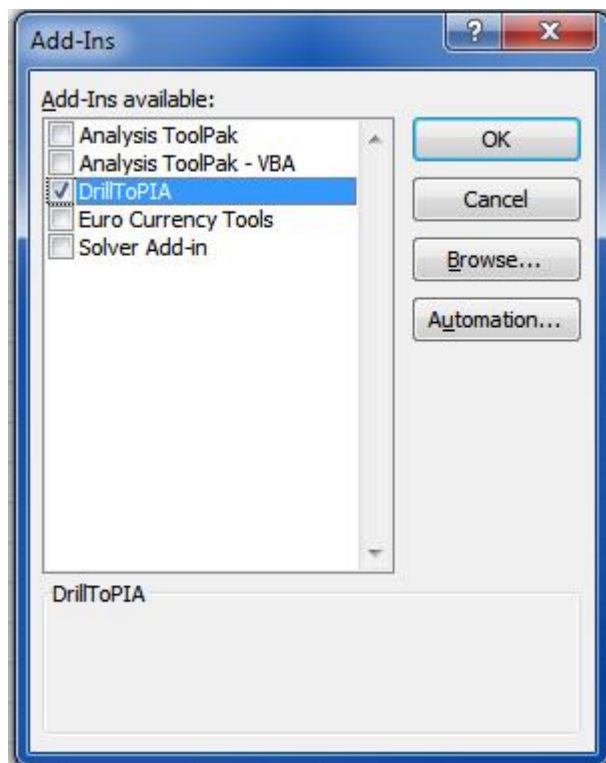To load the DrilltoPia.xla add-in to the Excel environment:

Save a copy of the Drilltopia.xla file to a permanent location on your workstation.
1. Go to your My Documents folder. Create a new folder called **PS_Excel_nVision.** (The actual folder name can be anything you want it to be, as long as it is something you know needs to be kept.)
2. Copy the Drillto Pia.xla file into the folder you created in step 1.

Note: This file could also be copied to a network or shared directory location so that others can have access to it.

For MS-Excel 2007 and 2010 and 2013:
1. Select the <**File**> tab and then select <**Options**>.
2. Select the <**Add-Ins>** entry in the left side menu.
3. At the bottom of the resulting dialog, there is an entry to Manage: "**Excel Add-Ins**". Hit the **Go** button.
4. On the resulting dialog, hit the Browse button and navigate to the folder you created in the steps above. For instance: …My Documents\PS_Excel_nVision
5. Select the **Drilltopia.xla** add-in and select **ok**.

It will return to the dialog, hit Ok and close out of MS-Excel.

To run a Drilldown via the Web:

1. Navigate to Reporting Tools - nVision - Define Report Request - Provide the Business Unit and other details to bring up the Report to be run - Submit the report.
2. Navigate to the Process Monitor page, (PeopleTools - Process Scheduler - Process Monitor), and click the Refresh button until the nVision report goes to Success and Posted.
3. Navigate to Reporting Tools - Report Manager - choose the Administration tab.
4. Select the Report Name, which will open the output file. Once open, select the cell on which the Drilldown will be performed.
5. Using the Excel toolbars, select nVision - Drill.
6. This will open a PIA page, which displays a list of available Drilldown reports. Select the appropriate Drilldown report and the Scheduler on which it will run. Be sure to specify if the output will be sent to either Web or Window.
   a. If the report is sent to Window, a pop-up window will appear while the report is being generated. Eventually the output will appear in the pop-up window.
   b. If the report is sent to Web, the page will redirect to the Report Manager.
7. After a few seconds, the Drilldown output will appear. In the Report Manager, it will take the file name format of DR_###_####.
8. Selecting the file name will enable the Drilldown output to appear.