

Instructions for Setting up your Computer for nVision Drilldown

In order to be able to run the drilldown functionality within PantherSoft, you will need to setup the Microsoft Excel on your computer. The instructions below will instruct you on how to perform this simple setup.

Note: You must first run an nVision report and then save the report to your computer. The Drilldown function can only be used with an nVision Report.

1. Open Internet Explorer and navigate to **panthersoft.fiu.edu**. Then click on Faculty/Staff Training.

The screenshot shows the PantherSoft website interface. At the top, there is a navigation bar with links for 'HOME', 'FACULTY & STAFF', 'STUDENTS', and 'CONTACT US'. Below this is a main content area with a large banner for 'Financials System 9.0' and a line graph. To the right of the banner is a 'QUICK LINKS' menu with the following items: 'Log In', 'Panther ID Look Up', 'Faculty/Staff Access Request', 'Faculty/Staff Training' (circled in red), 'Students Tutorials', 'News / Events', and 'Contact Us'. Below the banner are four columns of content: 'LEARNING' with 'TUTORIALS', 'NAVIGATE' with 'MY.FIU.EDU', 'MAINTENANCE' with 'SYSTEM MAINTENANCE DOWNTIME', and 'PANTHER NEWS' with a list of recent news items including 'Financial System Freeze', 'Mobile Application', 'Academic Redesign', and 'Financial System Upgrade'. The footer contains navigation links and the UTS logo.

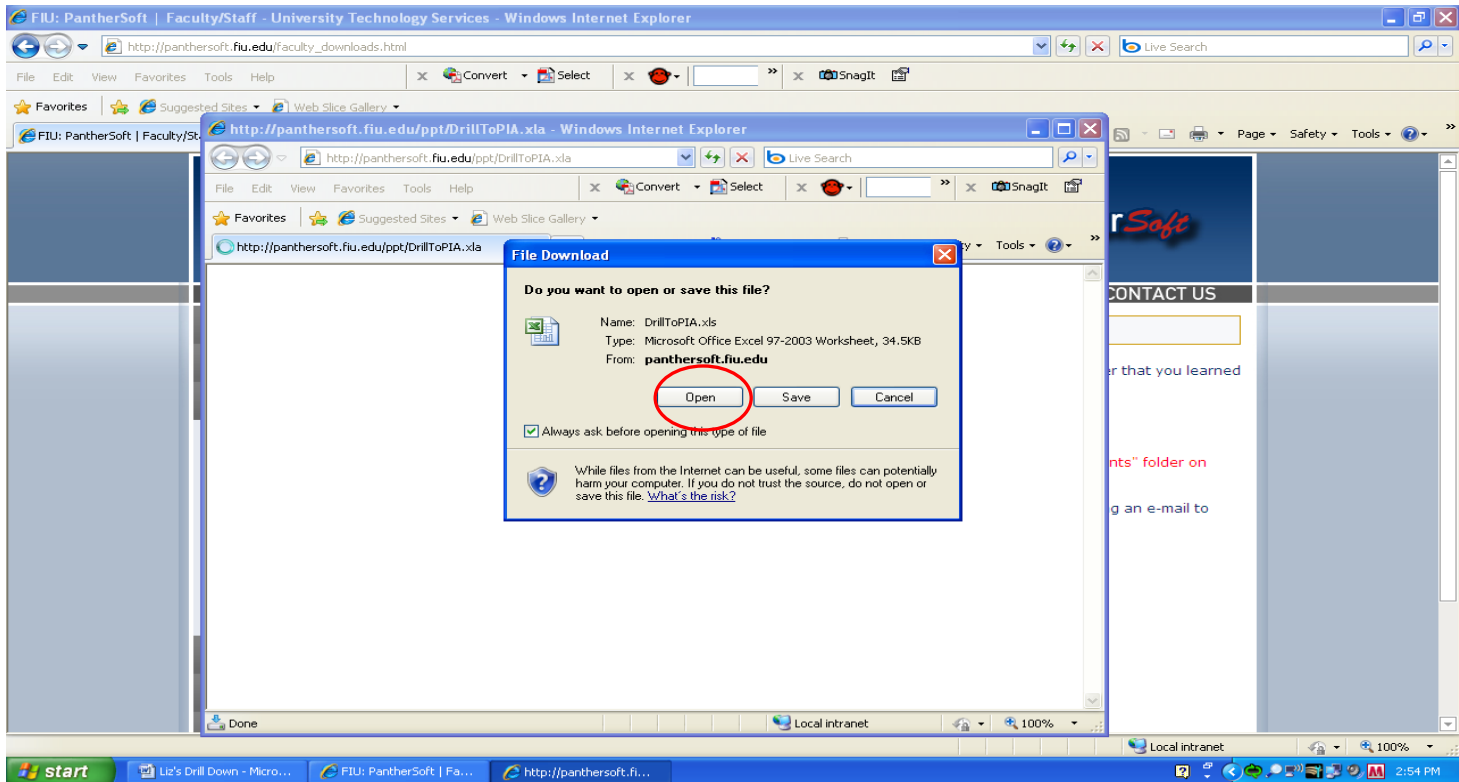
2. Click on Downloads.

The screenshot shows the top navigation bar of the Florida International University PantherSoft website. The header includes the FIU logo and the PantherSoft logo. Below the header is a horizontal menu with the following items: HOME, ABOUT US, FACULTY & STAFF, STUDENTS, and CONTACT US. A vertical navigation menu on the left side contains the following items: Home, About Us, Faculty & Staff, Accessing System, Financial System Training & Guides (with sub-items: Register for Training, Open Labs, Required Forms), Campus Solution Training & Guides, Support Services, Glossary, Frequent Asked Questions, Downloads (circled in red), Students, Contact Us, and News. The main content area features a section titled "Training Information" with the following text: "Florida International University is in the process of upgrading its PantherSoft Financials system from version 8.4 to 9.0. As part of the PantherSoft Financials upgrade, we are providing opportunities to help you use the new features that are part of PantherSoft 9.0. Training sessions based on your specific roles and responsibilities have been designed. Instructor led sessions are also available, but are only available to specific users identified by the Communication Partners. Open Labs will be available for the general public, starting July 14, 2009, which will be ongoing. End users will also have the ability to view the offered classes online through our User Productivity Kit (UPK), which is an online training tool. For more information, visit panthersoft.fiu.edu/financials". The footer contains the text: "FIU Home • FIU Phonebook • Division of IT • CIARA • ITSO • PantherSoft • CE6/WebCT" and the UTS logo.

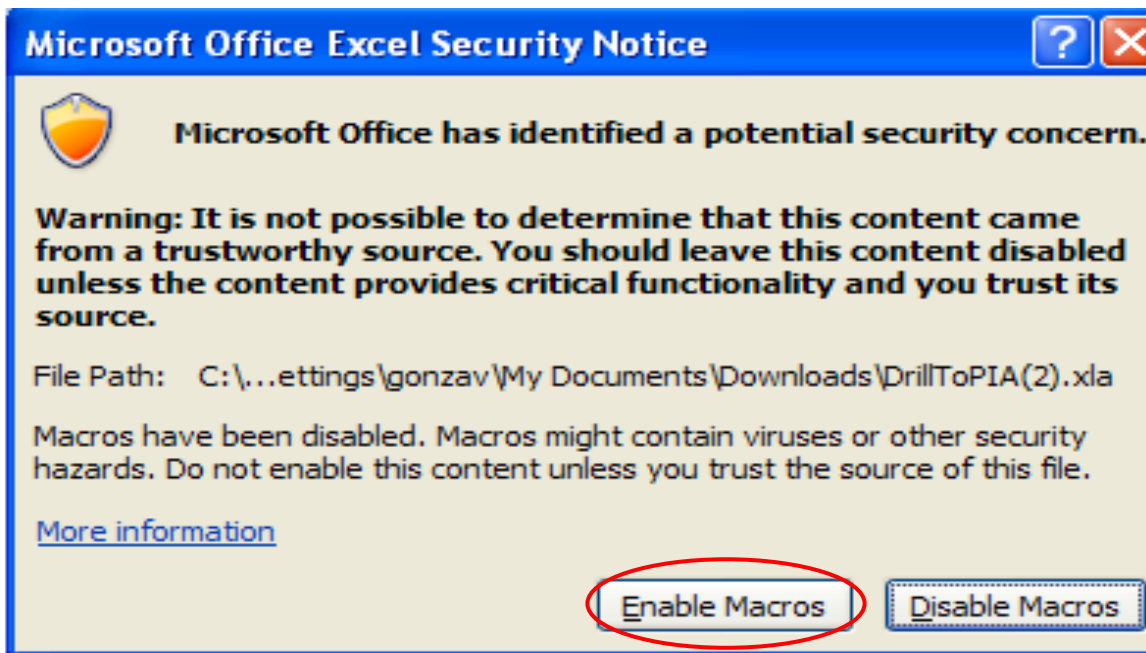
3. Click on Drilldown Add-In Files.

The screenshot shows a Windows Internet Explorer browser window. The address bar contains the URL http://panthersoft.fiu.edu/faculty_downloads.html. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Links bar contains various shortcuts like PS Database, Remedy, PS Info page, PS Tracks, FIU Home, PantherSoft Home, FIU Directory, FIUmail, Call Center Directory, Forms, ADP TimeSaver, and OSRA. The page header features the FIU logo, the text "FLORIDA INTERNATIONAL UNIVERSITY", and the PantherSoft logo. A navigation menu includes HOME, ABOUT US, FACULTY & STAFF (which is active), STUDENTS, and CONTACT US. A left sidebar contains a tree view with categories: Home, About Us, Faculty & Staff (expanded), Students, Contact Us, and News. Under Faculty & Staff, there are sub-links for Accessing System, Financial System Training & Guides, Campus Solution Training & Guides, Support Services, Glossary, Frequent Asked Questions, and Downloads. The main content area is titled "Financials Reporting Downloads" and contains the following text: "The following files are needed to activate the DrillDown functionality on your computer that you learned in your Financials Reporting Class." Below this is a list of two links: "DrillDown Instructions" and "DrillDown Add-in File (*)", with the second link circled in red. A red instruction follows: "(Right Click this link and select 'Save Target As' to place the file into the 'My Documents' folder on your computer.)". At the bottom of the main content area, it says: "If you have any questions concerning these instructions, please contact us by sending an e-mail to General FAQ". The footer contains links for FIU Home, FIU Phonebook, Division of IT, CIARA, ITSO, PantherSoft, and CE6/WebCT, along with the UTS logo.

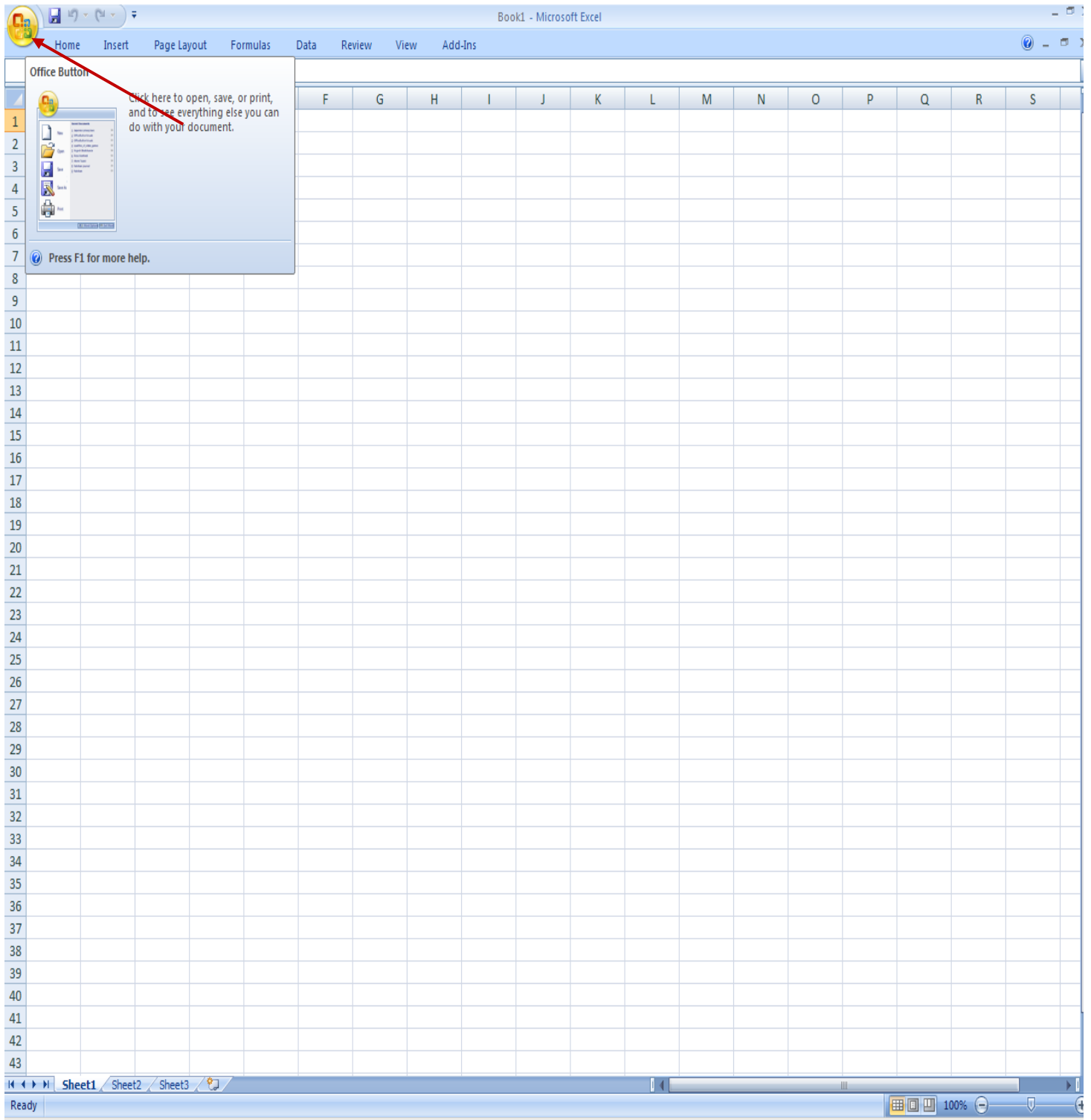
- After clicking on Drilldown a pop-up window will appear asking if you wish to open or save file. Click save file and save it to your desktop.



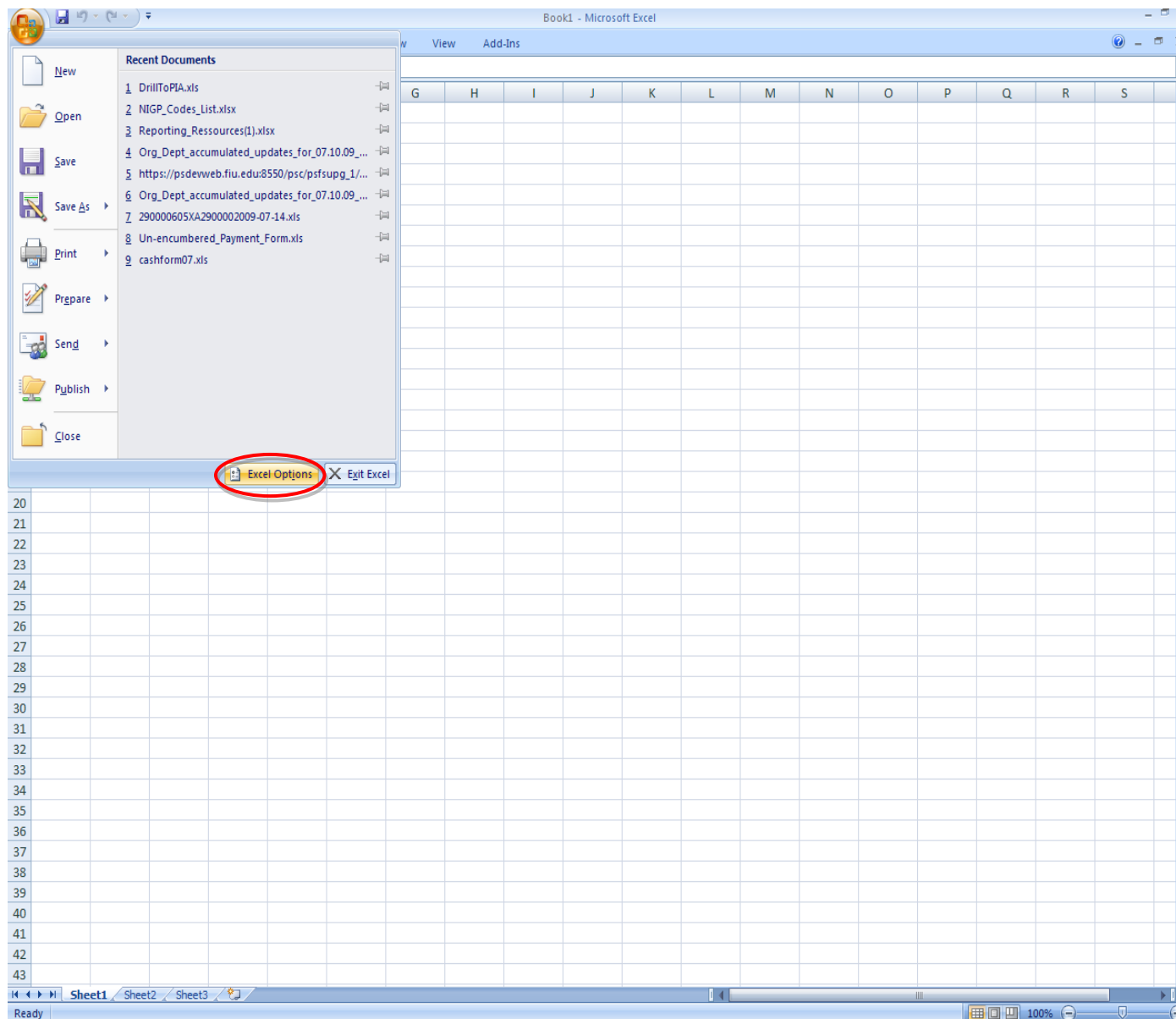
- Click on Enable Macros.



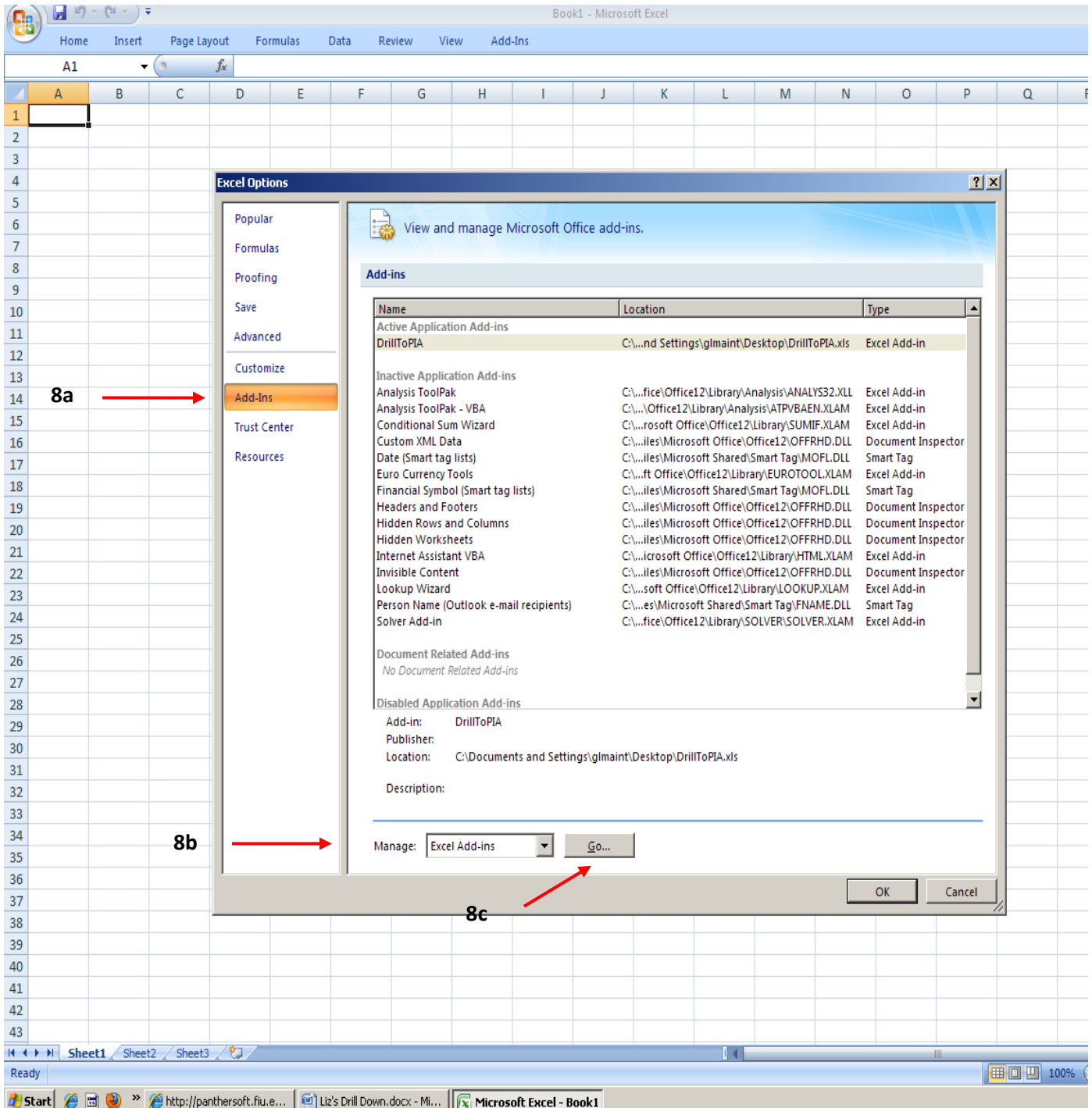
6. Open Microsoft Excel 2007. Click on the Excel Office Button top left corner.



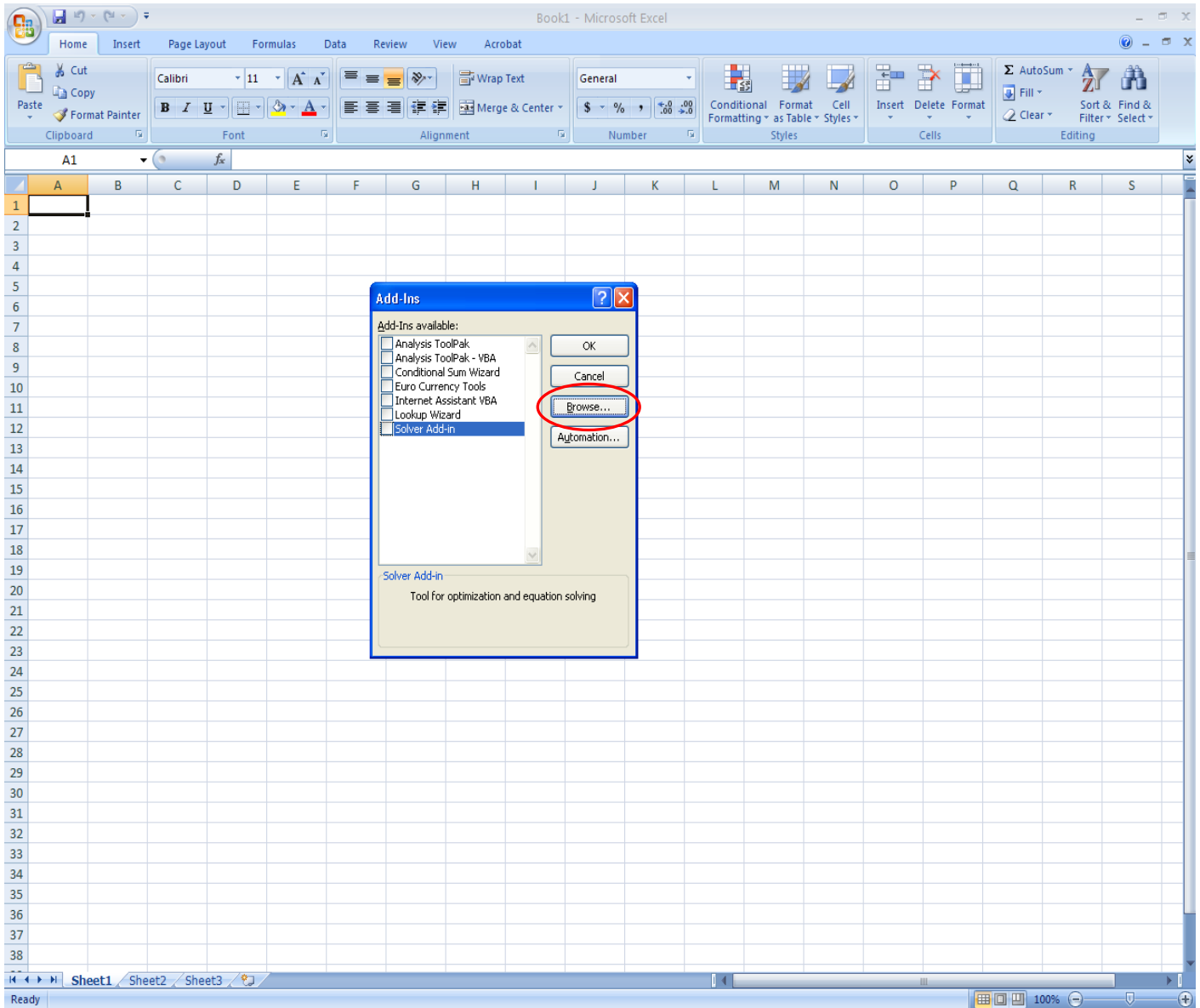
7. Click on Excel options button on the bottom right of menu.



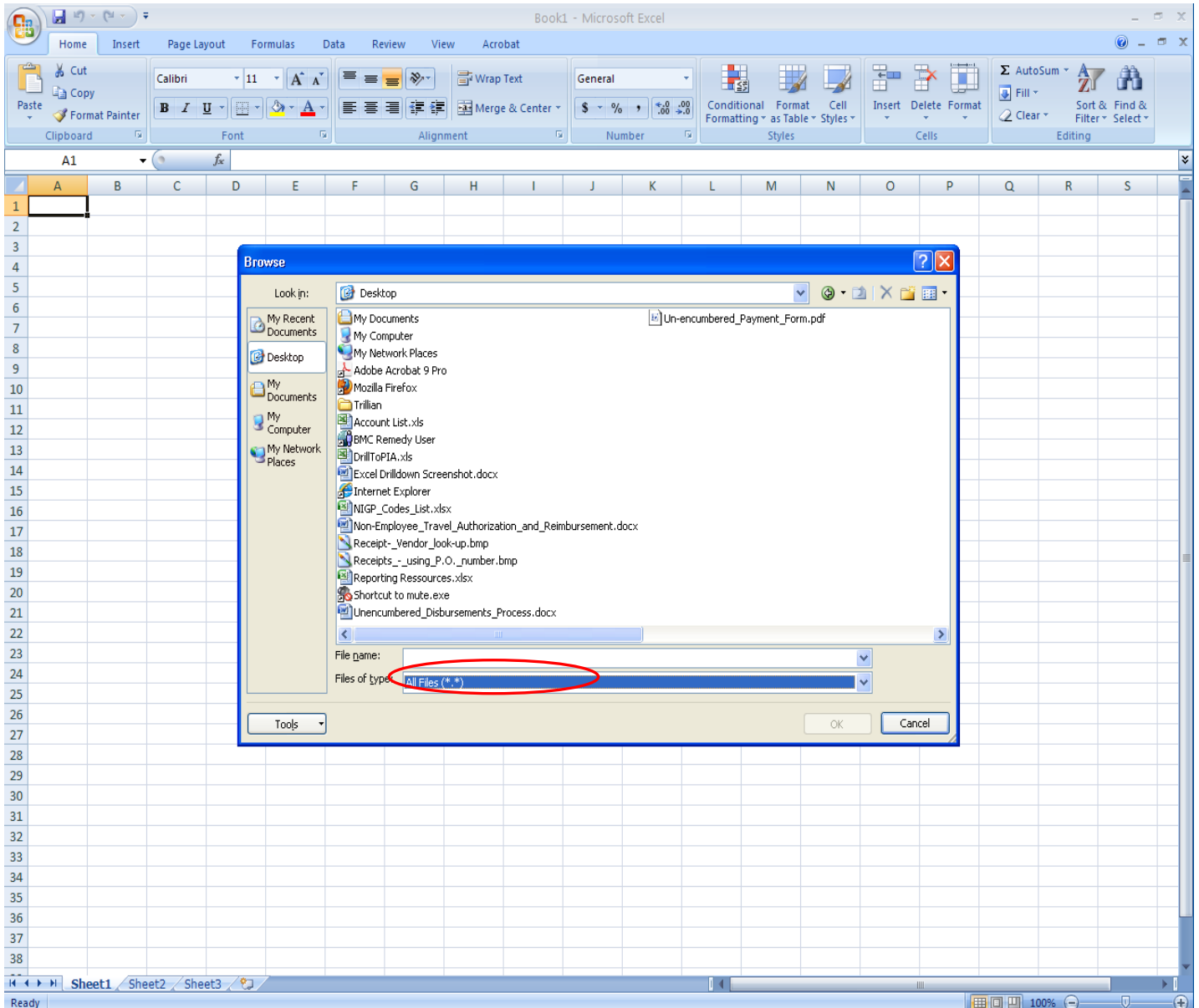
- 8a. Click on Add-Ins on left side of Excel Options menu.
- 8b. Make sure that "Manage: Excel Add-Ins" is populated in the bottom of menu box.
- 8c. Click Go.



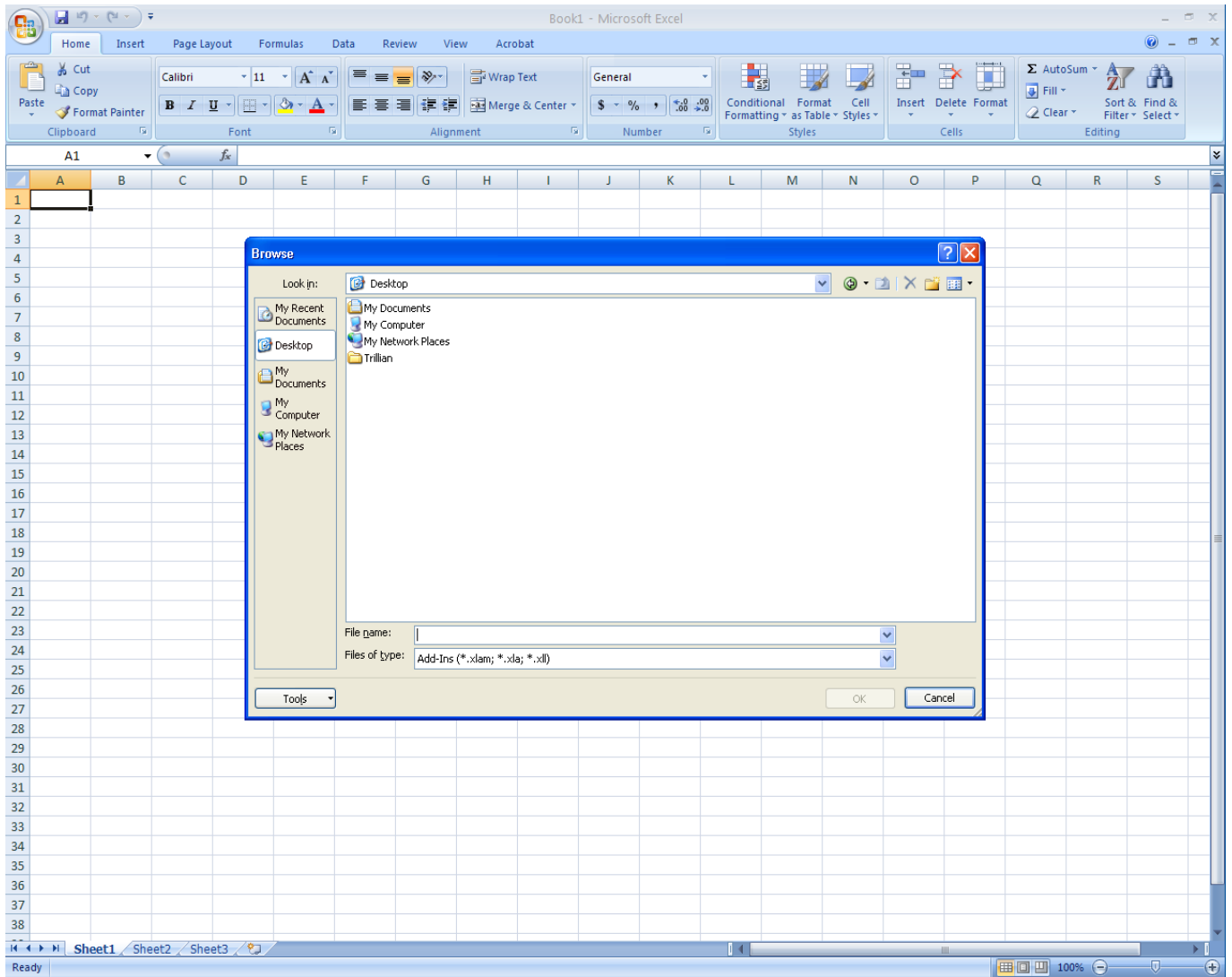
9. Click browse.



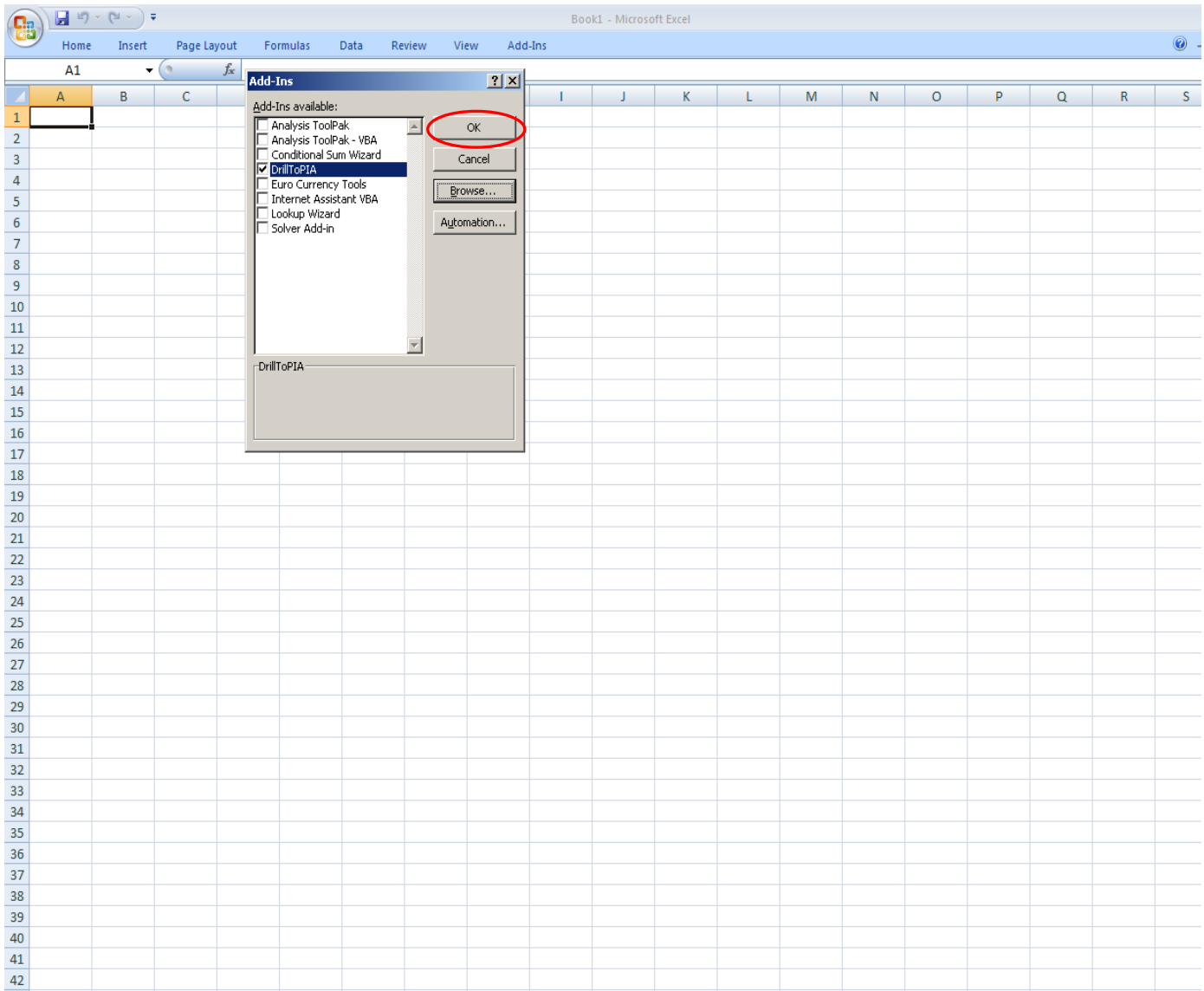
10. Change Files of type to "All Files (*.*)".



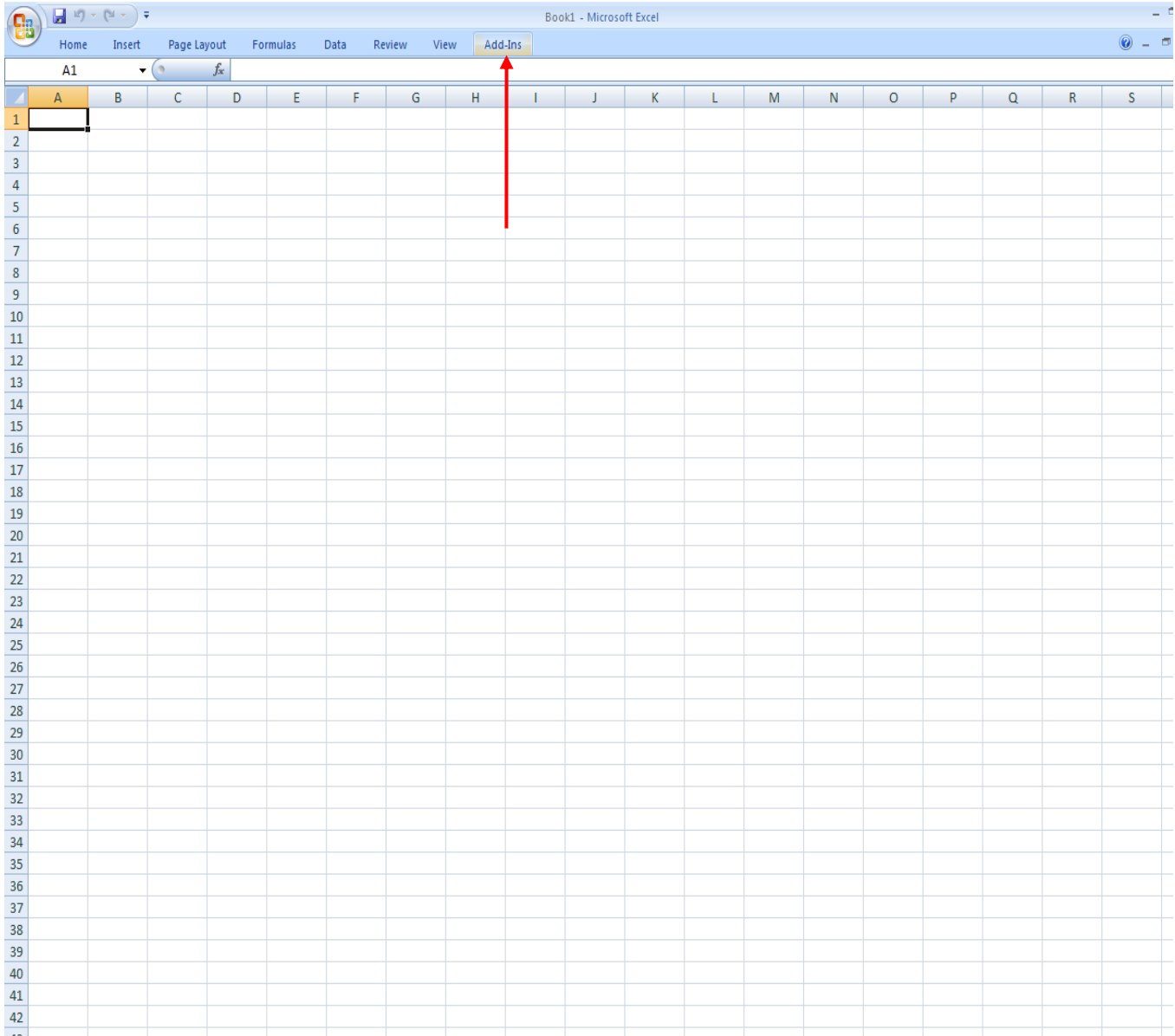
11. Browse to the DrillToPIA.xls saved file.



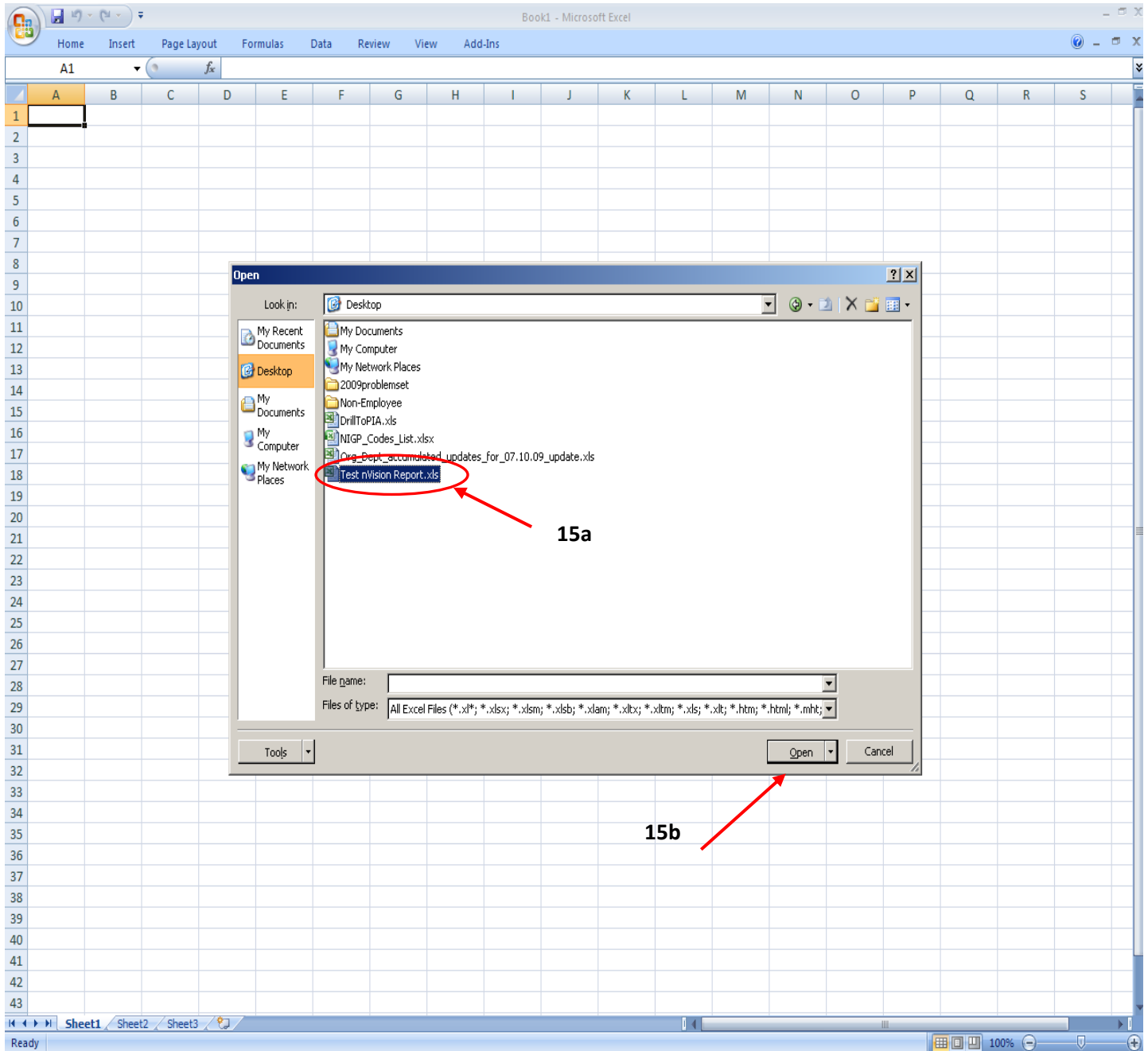
12. Select DrillToPIA and click OK.



13. The Add-Ins tab will now appear on the Quick Access Toolbar.



- 15a. Select the saved nVision Report.
15b. Click on the Open button.



Congratulations, you are ready to use nVision Drilldown!