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The University of New Orleans

PeopleSoft 9.0: nVision & Reporting Setup



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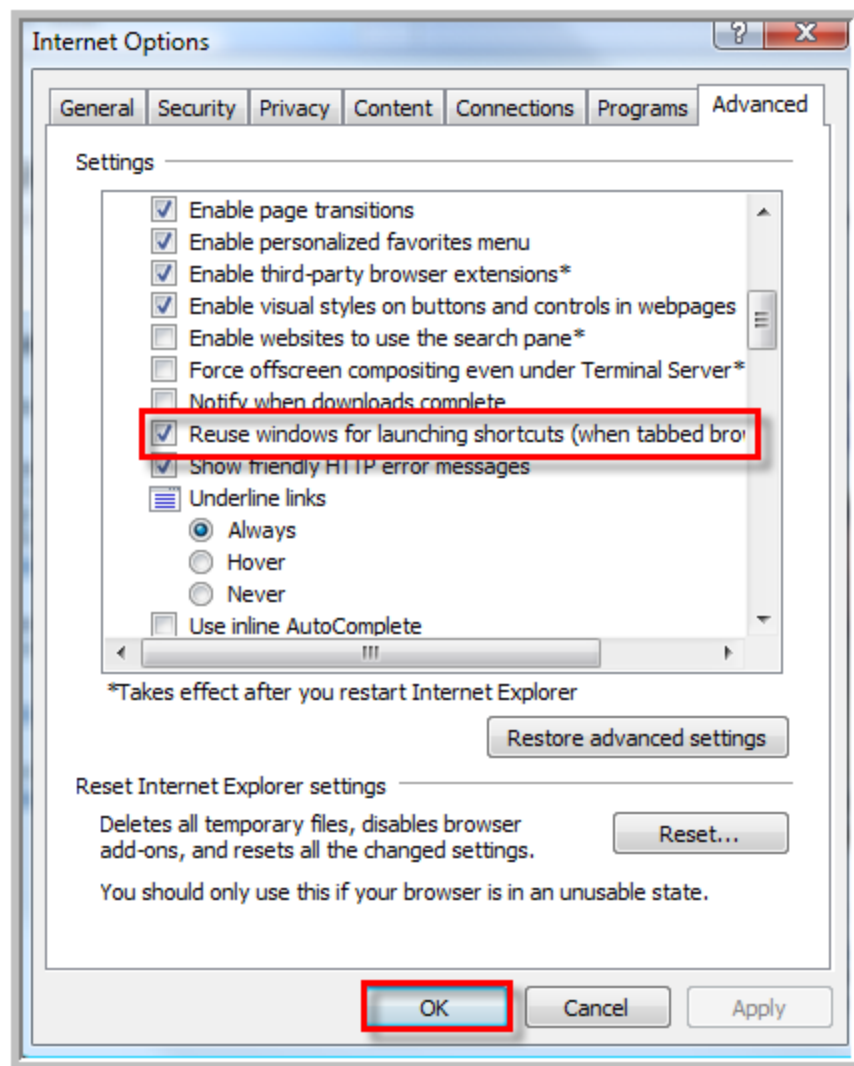
End-User nVision Setup

nVision requires an initial setup to operate as designed. Please use the instructions to configure both Internet Explorer and Windows Explorer. If a user would like to make use of Nvision Drill, an “add-on” must be installed within Excel on the PC.

Internet Explorer Configuration (XP,Vista)

Navigation: Tools> Internet Options> Advanced

1. Select Advanced Tab
2. Check “Reuse windows for launching shortcuts
3. Select OK



Explorer Configuration (XP only)

Navigation: Tools> Folder Options> File Types Tab

Note: To navigate to the Explorer window double click on My computer or My Documents. This may not be a current set up in your Explorer configuration.

1. Scroll down to XLS File type.
2. Click Advanced
3. Uncheck “Browse” in same window. **Note:** You must be the administrator to complete step 3.

Microsoft Excel 2003- Add- In

1. Download and save the Drill to PIA.xla file to your Desktop. A copy of the file can be obtained by emailing psweb@uno.edu
2. Launch Excel
3. Navigate to: **Tools> Add-ins**
4. Check “Drill To PIA”
5. Click OK
6. nVision Drill should show up as a main menu head within Excel. If you click on it there, should be one option, “Drill” This will work once you start using the nVision reports in PeopleSoft.

Note: Allow Macros in Excel: Tools>Options>Security>Macro Security> Change security to “Medium”

Microsoft Excel 2007- Add-In

1. Download and save the Drill to PIA.xla file to your Desktop. A copy of the file can be obtained by emailing psweb@uno.edu
2. When you receive the file Click Save Target as and save the file to your desktop.
3. Launch Excel
4. Select the Office button in Excel in the upper left hand corner.
5. Select the Excel Options button from the bottom left.
6. Select Add-Ins
7. Select “Go” next to Manage Excel Add-ins.
8. Select, “Browse” and find the “DrillToPIA” file in the location specified in step 1 then select Ok.
9. nVision Drill should show up in the Menu Commands section within Excel on the Add-Ins Tab. If you click on it there, should be one option, “Drill” This will work once you start using the nVision reports in PeopleSoft.