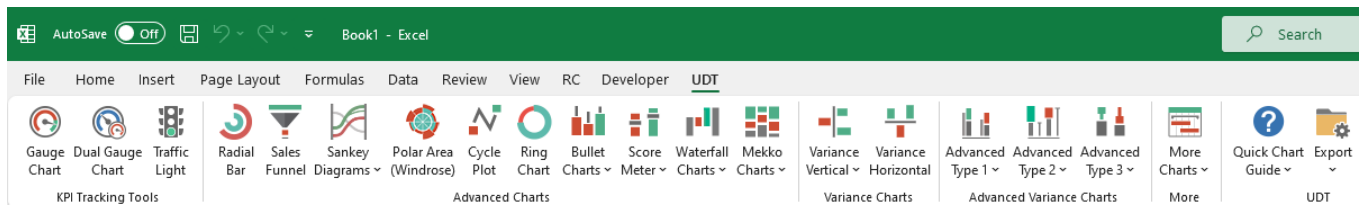


# Installation and Technical Guide

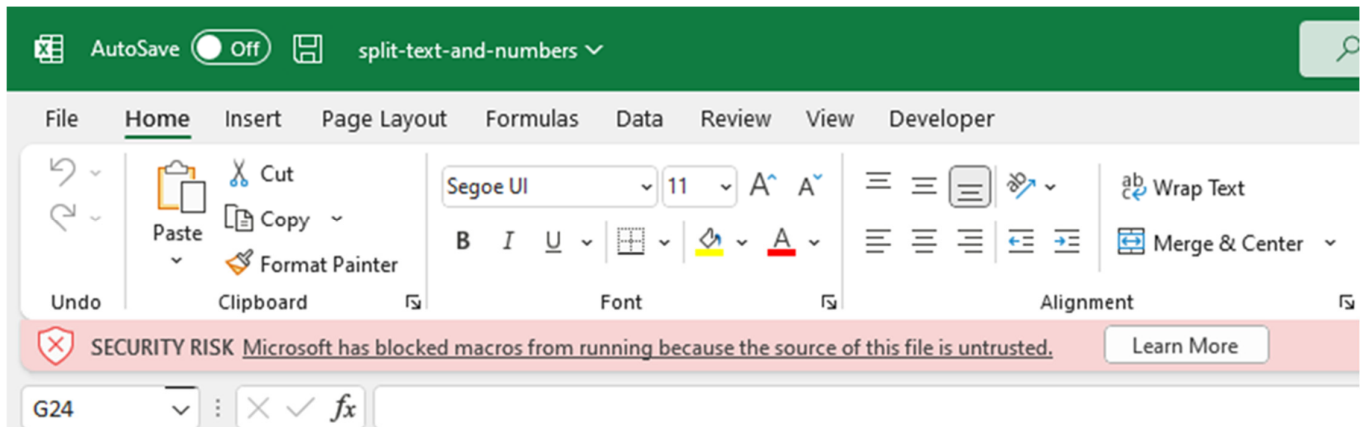


To install Ultimate Dashboard Tools for Excel, follow the steps below:

1. Check Excel Macro Settings
2. Extract the UDT.zip package and Unblock the Add-in
3. Add the add-in folder to a Trusted Location
4. Install the add-in

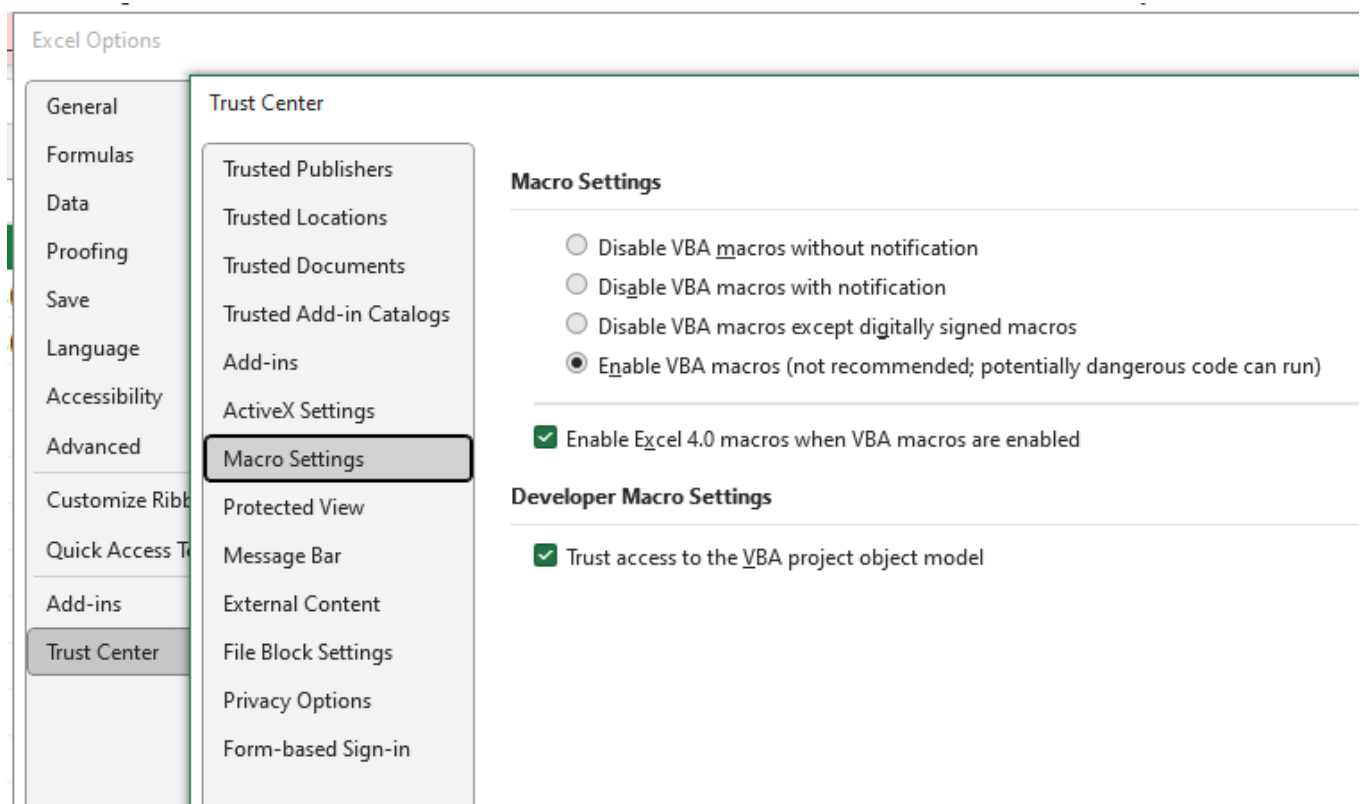
# 1. Excel Macro Settings

Macros can add extra functionality to Excel, but people with bad intentions often use them to distribute malware to unsuspecting victims.



**What should I do now?** To unblock macros, use the following setup:

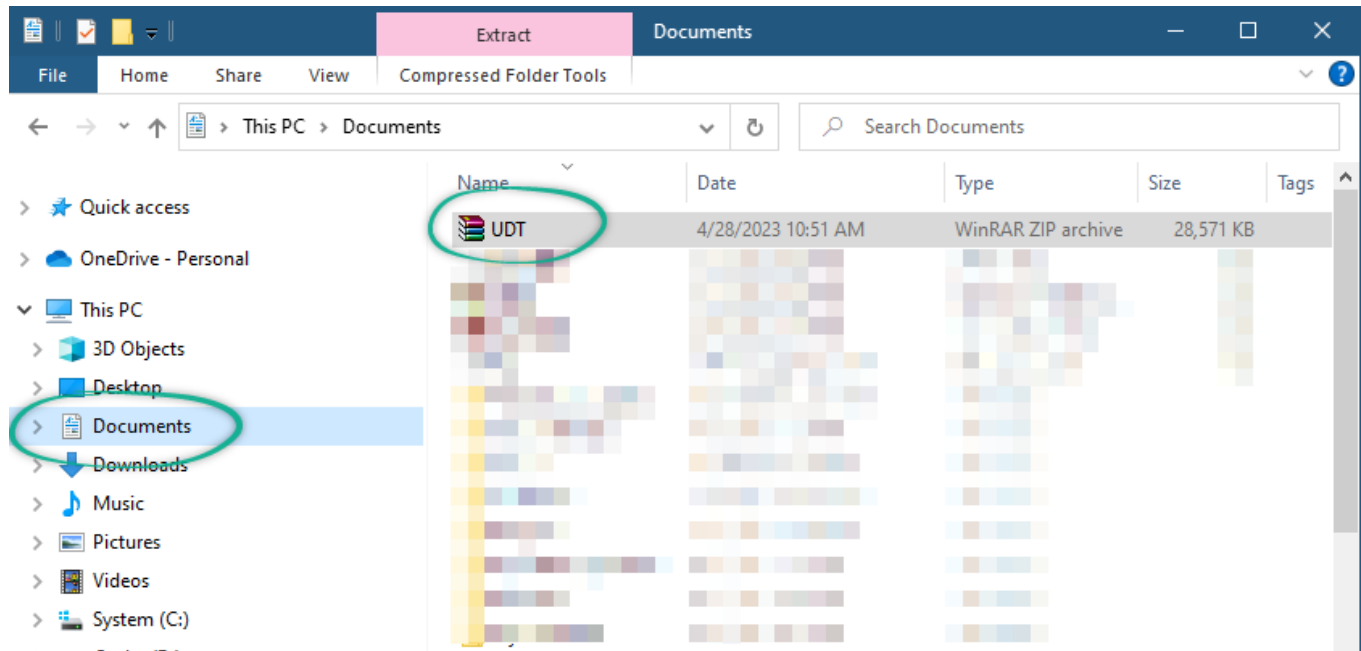
**File -> Options -> Trust Center -> Macro Settings**



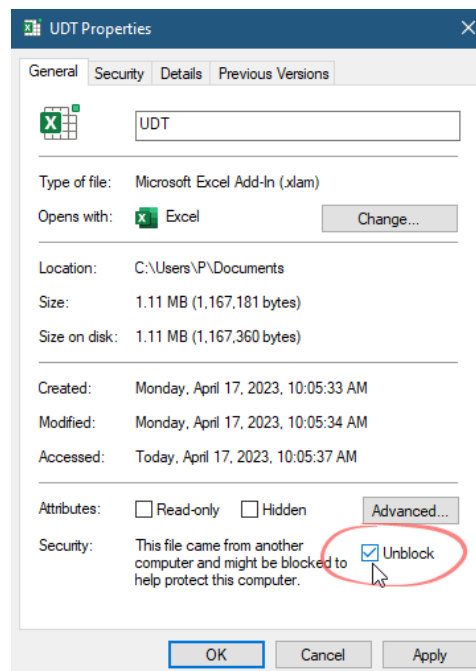
You can find our **code signing certificate** in the zip package. In addition, we (**Visual Analytics Ltd.**) ensure you that our add-in does not create temporary files, send data over the internet, or run any harmful code.

## 2. Extract the UDT.zip package and Unblock the Add-in

Extract the downloaded zip package (UDT.zip) into your Documents folder.



Right-click on the UDT.xlam and choose Properties. If this warning appears, check the Unblock checkbox: This File came from another computer and might be blocked to help protect this computer. Click OK.

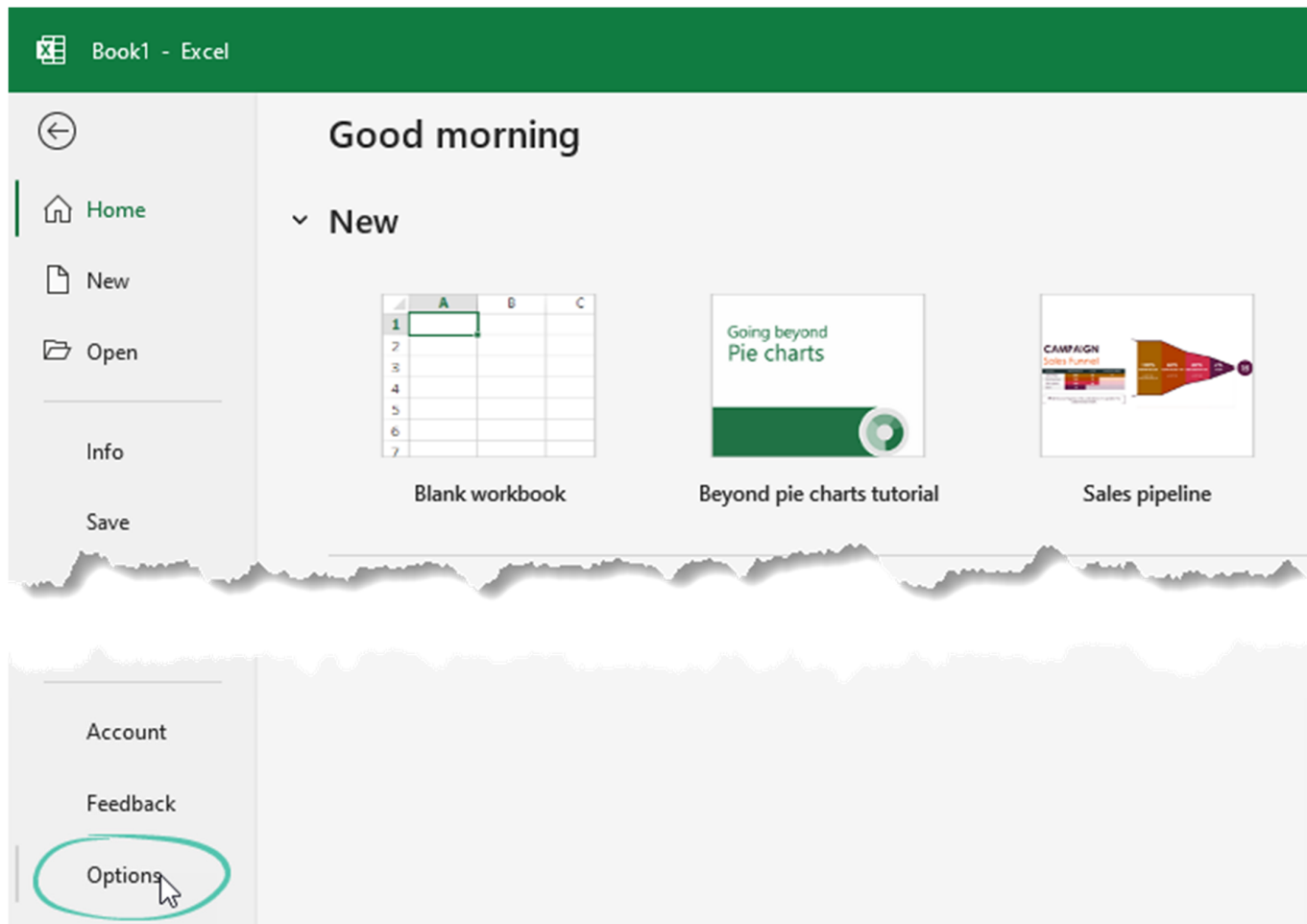


### 3. Store the Add-in in a Trusted Location

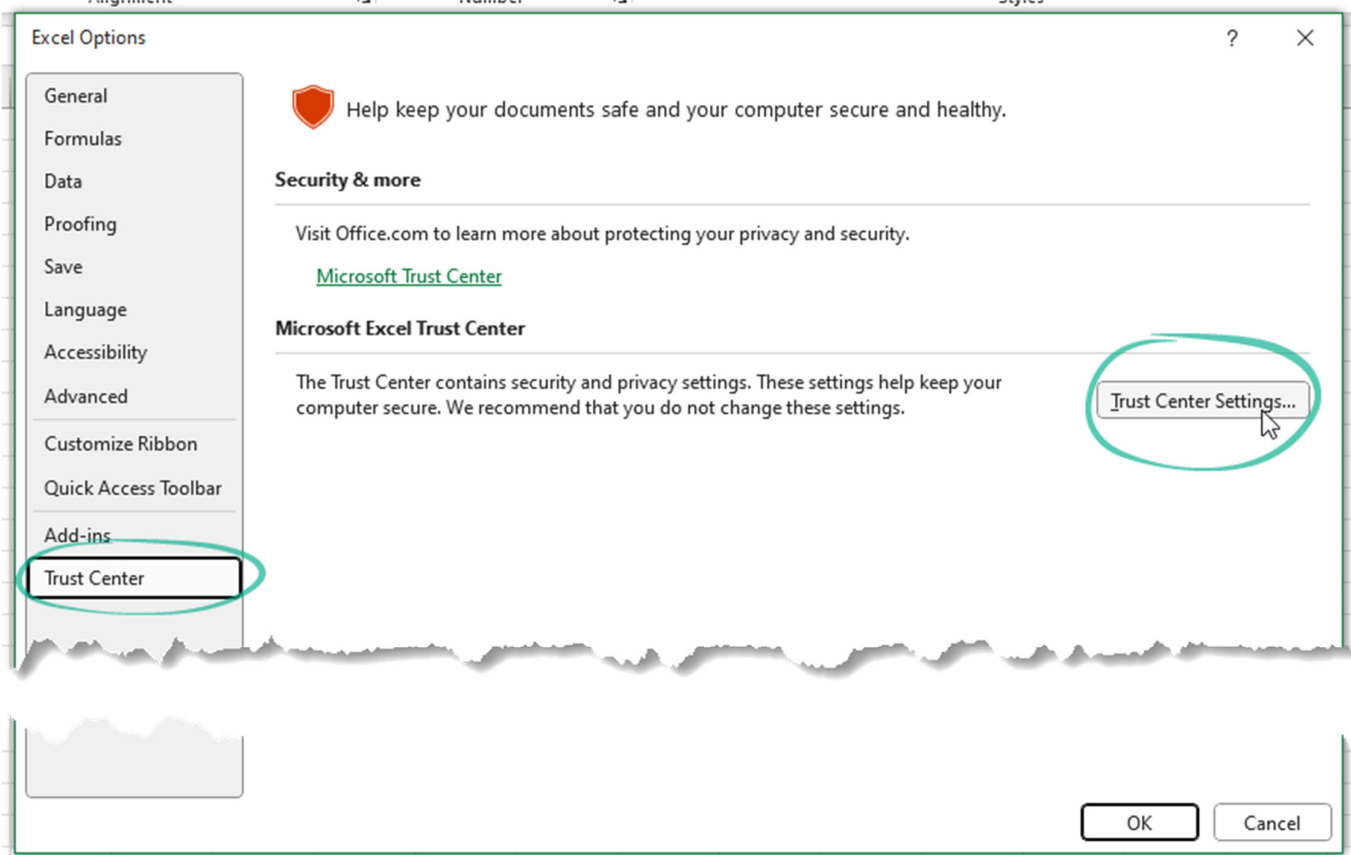
A recent Microsoft Office security update has caused add-in **Ribbon Menu Bars to disappear when Excel is opened**. The best solution to this problem is to store the add-in file in a Trusted Location. A Trusted Location is a folder on your hard drive or server that has been added to the Trusted Locations list in Excel.

You probably have a UDT folder in your selected folder. **You can add this folder to the trusted locations list.**

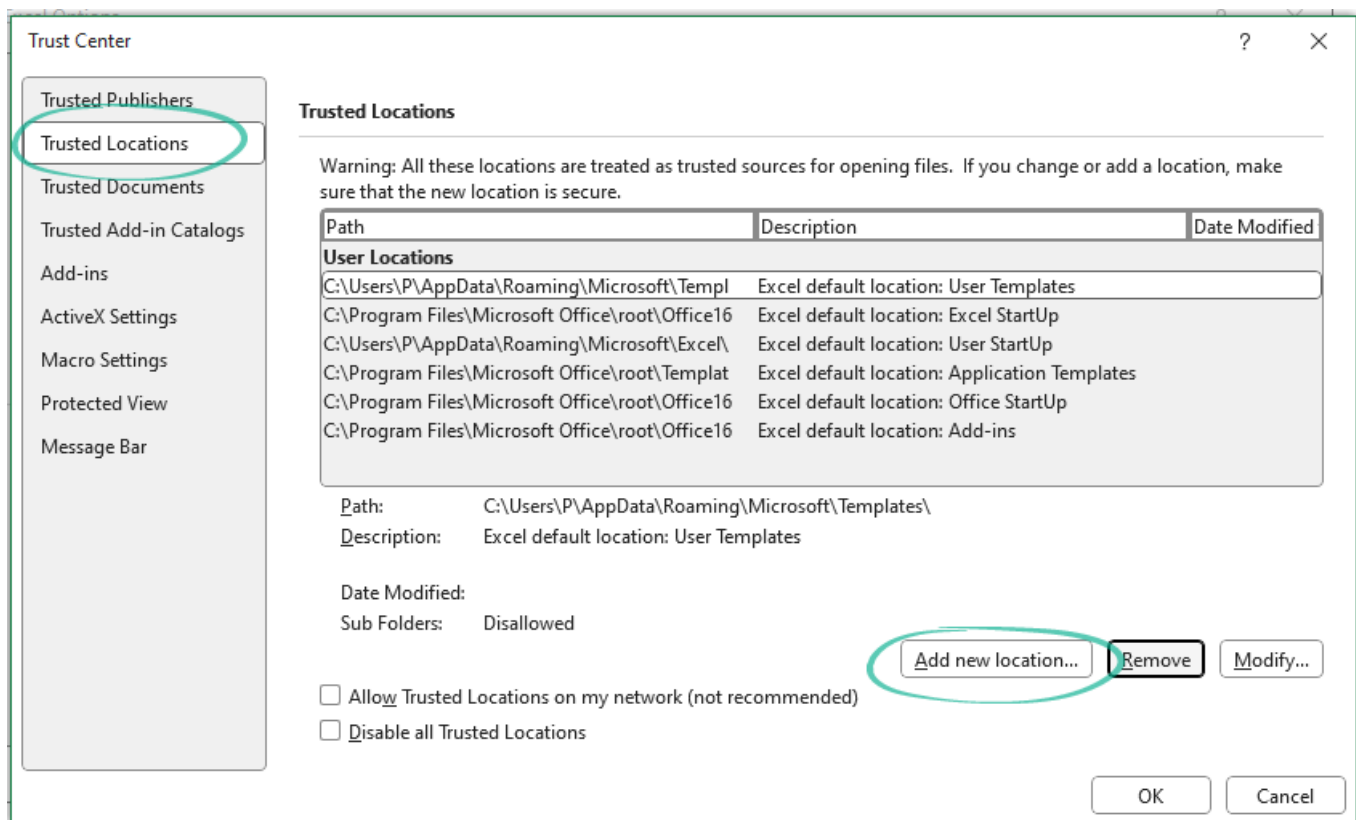
**Open the Trusted Locations menu:**  
**Choose File > Options**



## Trust Center > Trust Center Settings.

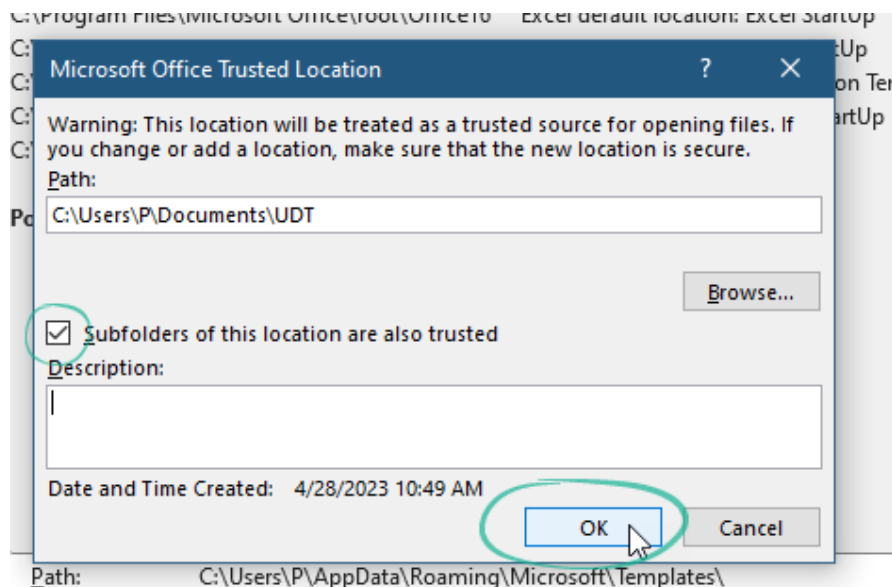


Click **Trusted Locations** > Click the **Add new location button**.



The screenshot shows a Windows File Explorer window titled "Browse". The address bar indicates the current location is "This PC > Documents". The left-hand navigation pane shows the "Documents" folder selected. The main content area displays a list of folders with columns for "Name", "Date", and "Type". The folders listed are "UDT" (created 4/17/2023 11:01 AM) and "Visual Studio 2022" (created 8/21/2022 10:24 AM). At the bottom of the window, the "Folder name" field contains the text "UDT". The "OK" button in the bottom right corner is circled in red.

Next, click the “**Subfolders of this location are also trusted**” checkbox.



Press OK, then press OK again on the Trust Center Window - Finally, close and re-open Excel.

## The Default AddIns Folder Needs to be Trusted

The following path is the default location where add-ins are stored on the computer:

C:\Users\**your\_username**\AppData\Roaming\Microsoft\AddIns

If you store add-ins in this default AddIns folder, you must add them to the Trusted Locations list. For most users, it is not trusted by default.

## More information and detailed tutorials on Youtube:

### How to Install an Excel Add-in:

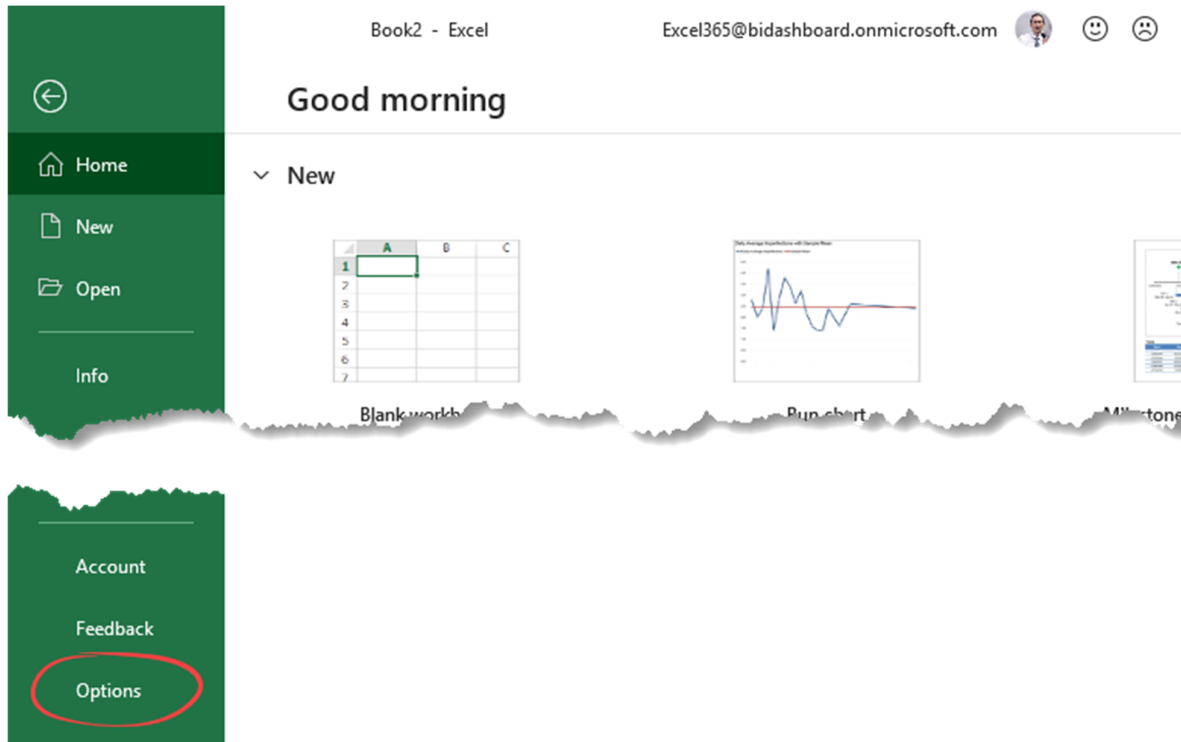
<https://youtu.be/mlpncmYhNGk>

### How to Re-enable an add-in that is Disabled or Missing:

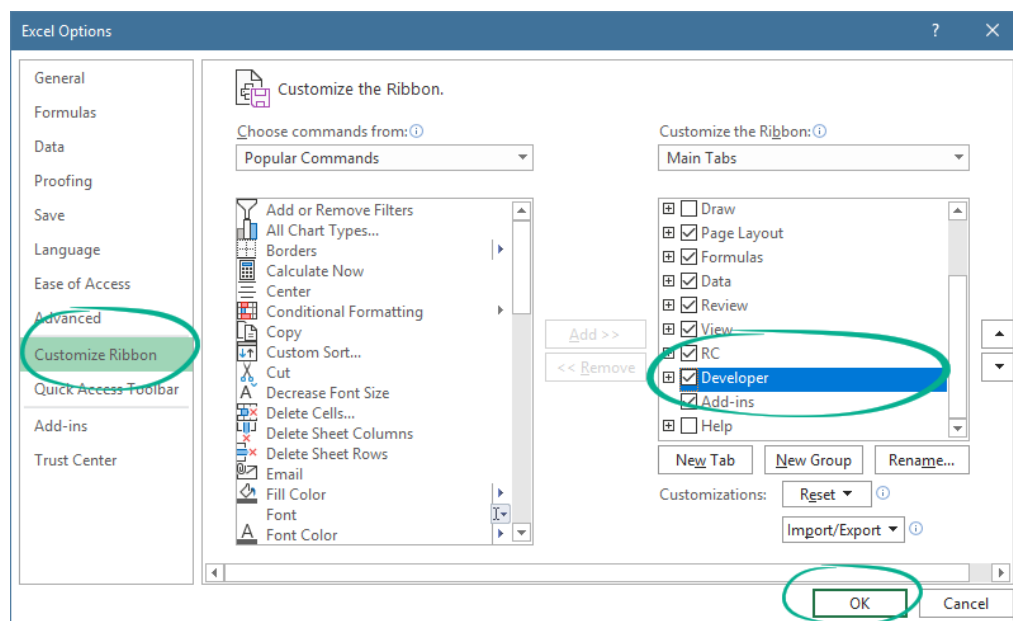
<https://youtu.be/AaTkENolh08>

## 4. Install the add-in

Start Excel to begin the installation. First, if it is unavailable, you must enable the **Developer Tab**. Click File -> Options. A new window will appear.

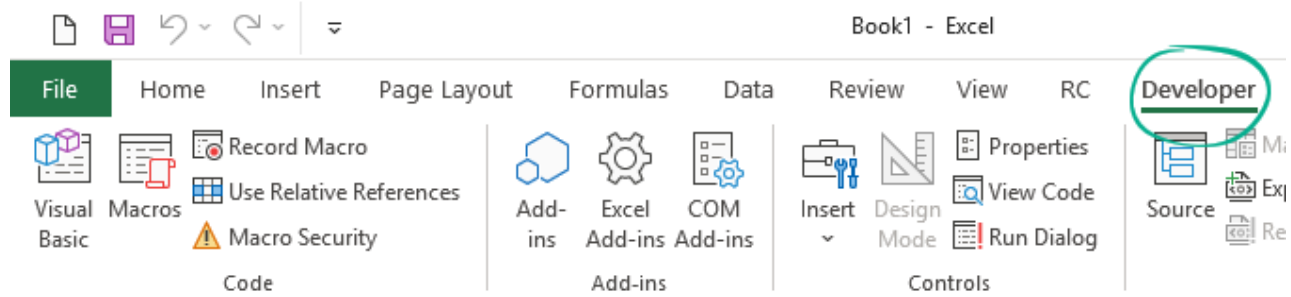


Select the Customize Ribbon option, and ensure the Developer Tab is checked. Click OK.

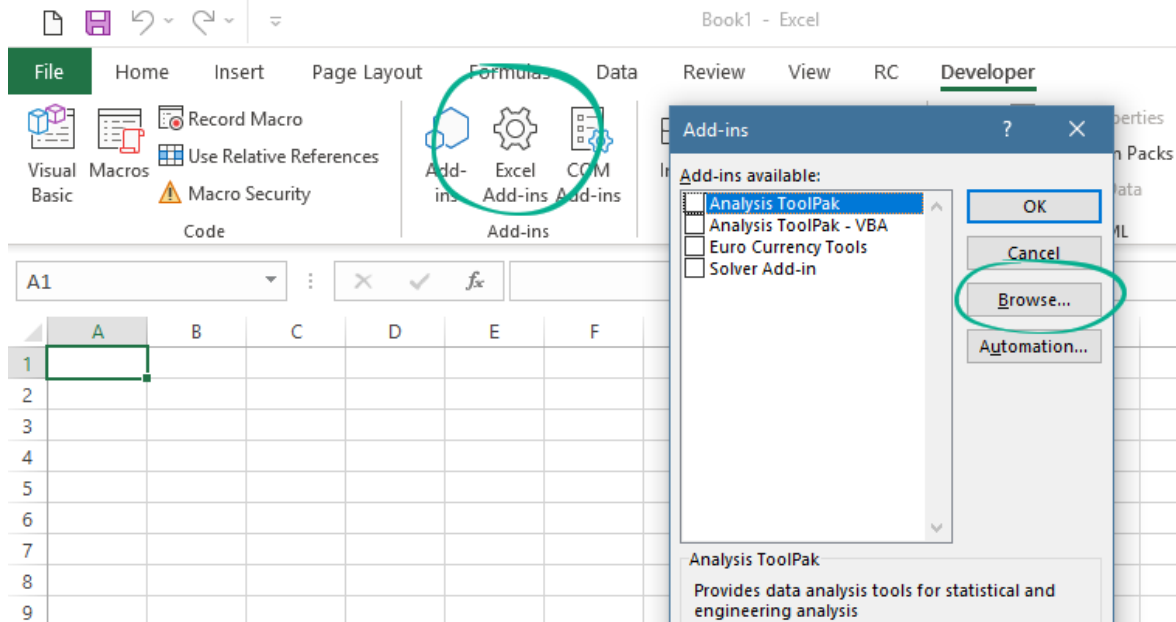


The **Developer Tab** is installed.

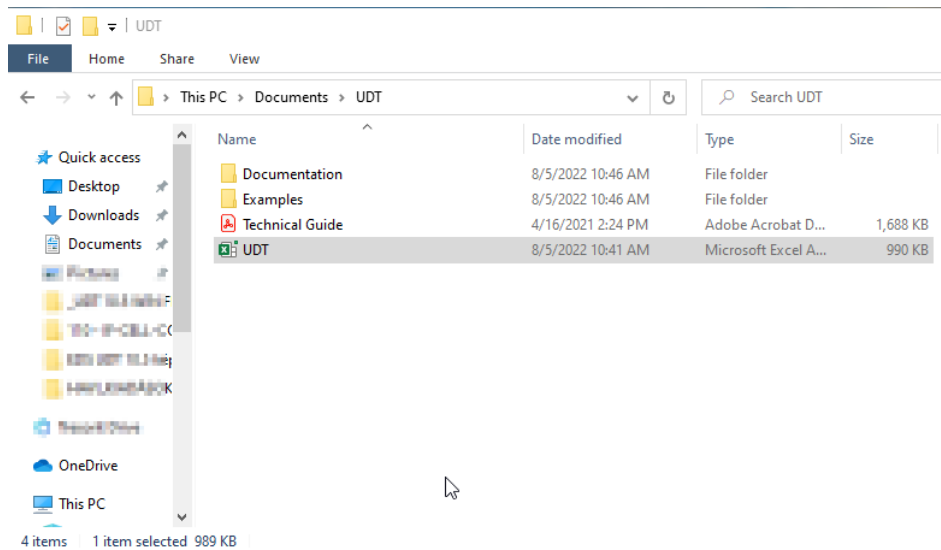




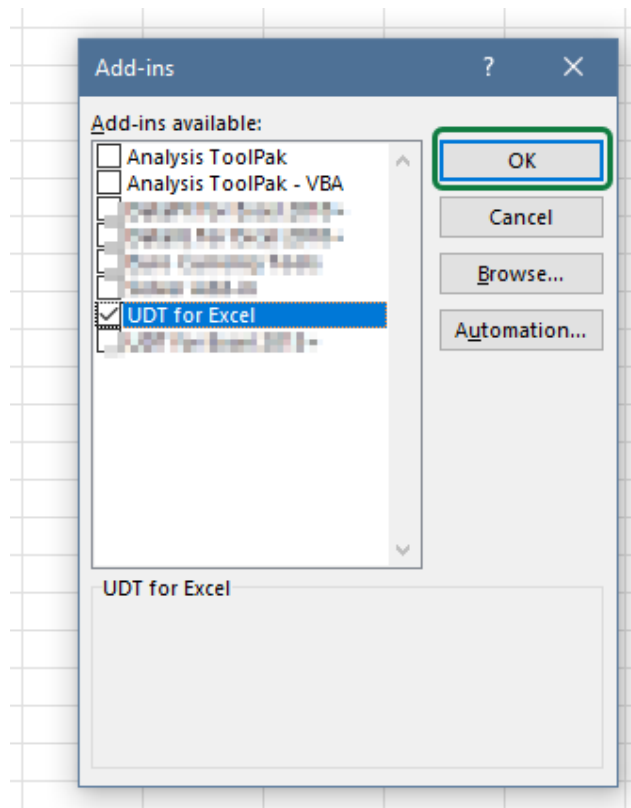
Click **Excel Add-ins** under the Add-Ins Group. The Add-ins dialog box appears. Click Browse.



The add-in is located on your computer and can be installed or activated by clicking Browse (in the Add-Ins dialog box) to locate the add-in. Use the UDT.xlam file for Excel 2013, Excel 2016, Excel 2019, and Office 365 (Microsoft 365)



Select the checkbox in the „**Add-Ins available box**” and click OK.



Now UDT is ready to use!

