Installing TreePlan, SimVoi, and SensIt

3

3.1 INSTALLATION OVERVIEW

TreePlan, SimVoi, and SensIt are decision analysis add-ins for Microsoft Excel 2007 & 2010 & 2013 & 2016 (Windows) and Microsoft Excel 2011 & 2016 (Macintosh).

In general, an Excel add-in is software that adds features to Excel. TreePlan helps you build decision tree diagrams. SimVoi provides random number generator functions for model inputs, automates Monte Carlo simulation, and creates Excel charts for a histogram and the cumulative distribution of each output variable. SensIt performs sensitivity analysis on your worksheet what-if model and automatically creates simple plots, spider charts, and tornado charts. These instructions are appropriate for installing each of these products.

For each add-in, all of the functionality, including its built-in help, is a part of the single file in XLAM format. There is no separate help file. On a Windows computer, the installation does not create Windows Registry entries, although Excel may use such entries to keep track of its add-ins.

3.2 REMOVING PREVIOUS VERSIONS

Before you open or install an add-in, you must remove any previous versions of the add-in. Excel will not work correctly if you try to use two versions of the same add-in simultaneously. For example, if you were using a trial version and now you want to use the standard version, Excel will regard this as two versions of the same add-in. The same applies to moving from an older to a newer version, such as from SensIt 1.31 to SensIt 1.46.

If you were using the previous version by "opening" the add-in file, then all you need to do is not open that previous version. Instead, "open" the new version of the add-in.

But, if you had "installed" the previous version, then you must "uninstall" the old version before using the new version. For instructions, refer to the appropriate Uninstalling subsection at the end of each of the Installing sections.

3.3 THE ADD-IN XLAM FILE

Excel can recognize the XLAM file format, but not the ZIP file format. The software, however, is often available as part of a ZIP file. To get the file into a format Excel can recognize, you will extract the XLAM file from the downloaded ZIP file.

A typical filename for the downloaded software would be SensIt-146-Pro-Files.zip. If you are using a Windows operating system, right-click the ZIP file, and choose Extract All. Then specify a disk or folder. On a Macintosh, double-click the ZIP file, and the files are automatically extracted into a folder. Be sure to remember the location of the extracted files.

If you have purchased more than one product, all of the purchased files XLAM files will be bundled into a single ZIP file.

After you have extracted the XLAM file, it's now stored on your computer's disk or in a folder. To use it in Excel, you have a choice of two methods: to "open" or to "install." Although the simplest method is to "open" the add-in, you will need to remember the file's location each time you want to use it. If instead you "install" the add-in file, Excel will remember the location for you.

Depending on the version of Excel and the type of operating system you're using, go to the appropriate section of this manual for instructions on either method, with accompanying screen shots.

3.4 Unblock the XLAM Add-in File for Windows Excel

3.5 Windows Excel 2007 – 2016 Opening an Add-in

3.6 Windows Excel 2007 – 2016 Installing an Add-in

Windows Excel 2013 & 2016 Important Extra Step

Windows Excel 2007 – 2016 Uninstalling an Add-in

3.7 Mac Excel 2011 Opening an Add-in

3.8 Mac Excel 2011 Installing an Add-in

Mac Excel 2011 Uninstalling an Add-in

3.9 Mac Excel 2016 Opening an Add-in

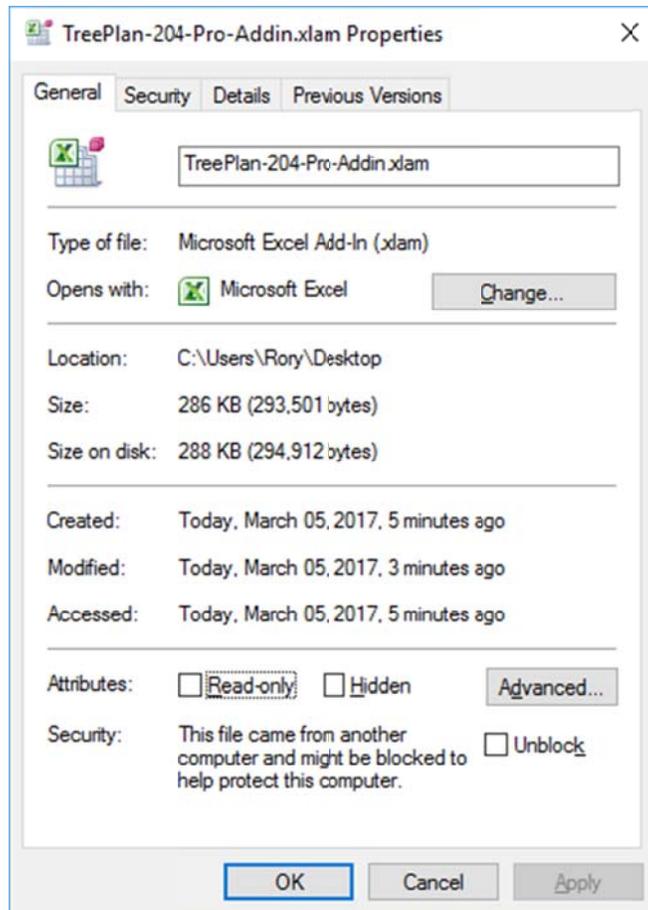## 3.4 UNBLOCK THE XLAM ADD-IN FILE FOR WINDOWS EXCEL

In 2016 Microsoft released a security update which may affect downloaded XLAM add-in files with Windows Excel. The security update also affects XLAM files transferred from another computer.

After you open or install the add-in XLAM file, the menu item may not appear in the Add-Ins ribbon, and the add-in may not respond to the shortcut key. If so, quit Excel, and follow these instructions.

Alternatively, follow these instructions before you open or install the XLAM file.

1. Use your file manager, e.g., File Explorer, to navigate to the add-in XLAM file on your local drive.

2. Right-click the XLAM file, and choose Properties > General.

3. If there is an option to Unblock, click the checkbox and click OK.

See the example below, where the Unblock checkbox appears in the bottom right Security area of the dialog box.

Figure 3.1 Excel 2007 – 2016 Trust Center Add-Ins Settings

After you click the Unblock checkbox and click the OK button, launch Excel, and use Excel's File > Open to load the XLAM file, or follow the instructions for installation.

For more information, see https://support.microsoft.com/en-us/kb/3181507.

3.5 WINDOWS EXCEL 2007 – 2016 OPENING AN ADD-IN

This is the simplest method. This method is also preferred when using an add-in temporarily on another computer.
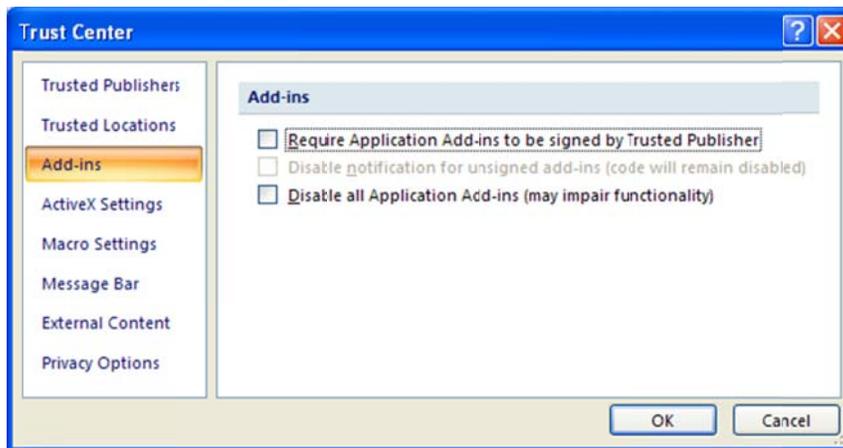
We recommend you Unblock the XLAM file first.

Start Excel, and choose File > Open.

Be sure to start Excel first, and then use Excel's command to open the XLAM file. Do **not** double-click the XLAM file to open it. If you open the file by double-clicking, Excel may not execute some important code in the XLAM file that configures the add-in for your system.

Excel 2007 – 2016 have enhanced levels of security for macros. Each of the add-in files is an unsigned macro file, which may trigger a security warning in Excel. The steps below allow you to tell Excel that this macro is trustworthy.
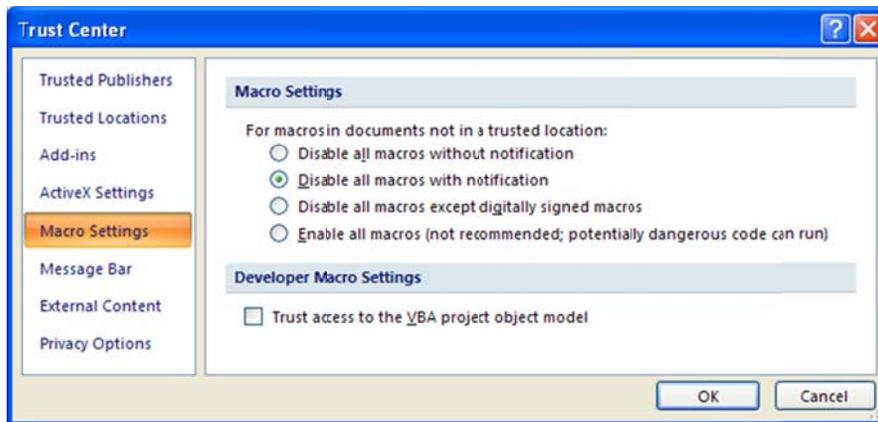
Step 1: Start Excel, and choose File > Options > Trust Center > Trust Center Settings > Add-ins. Uncheck all checkboxes (as shown below in Figure 3.1), and click OK.

Figure 3.1 Excel 2007 – 2016 Trust Center Add-Ins Settings

Step 2: In the left column of the Trust Center, click "Macro Settings." The screen below will appear.

Figure 3.2 Excel 2007 – 2016 Trust Center Macro Settings

In the section "Macro Settings," click on Disable all macros with notification, and click OK. On the screen that follows, again click OK.

Step 3: On the main display of Excel, choose File > Open. Navigate to the location of the add-in XLAM file, select the file, and click Open. The screen below appears.

Figure 3.3 Excel 2007 – 2016 Security Notice

Click Enable Macros. For your protection, you will see this screen each time you open and run the add-in. Always click Enable Macros.

Step 4: At the Excel main display, choose the Add-Ins ribbon. In the Menu Commands area of the Add-Ins ribbon, select the menu item for the appropriate add-in: SensIt One-Input Plot, SensIt Tornado-Spider, SimVoi Simulation, or TreePlan Decision Tree. For more information, refer to the add-in user guide.

3.6 WINDOWS EXCEL 2007 – 2016 INSTALLING AN ADD-IN

Windows operating systems allow multiple users of a single computer to partition and thus share the computer, with an Administrator maintaining overall control. The following instructions are appropriate for installing an add-in in either an Administrator or standard user account.
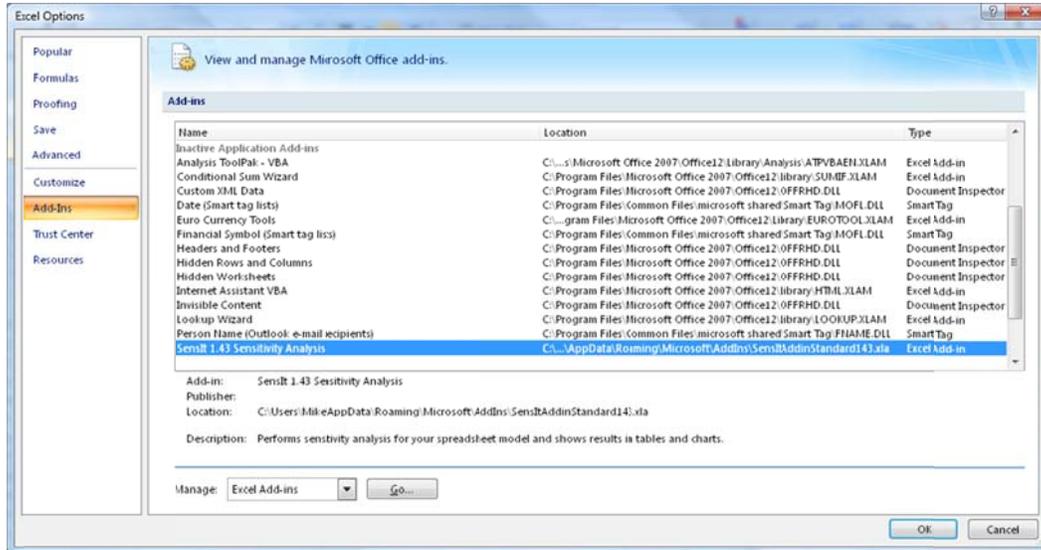
We recommend you Unblock the XLAM file first.

In Windows 7, 8, or 10, copy the XLAM file, and paste it into folder

`C:\ Users \ UserName \ AppData \ Roaming \ Microsoft \ AddIns`

If you do not see the AppData folder in your *UserName* folder, it may be hidden. To view the folder in Windows 7, choose Start > *UserName* > Organize > Folder and search options > View. In the Advanced settings, click the option button for "Show hidden files, folders, and drives." In the Windows 8 or 10 File Explorer, choose View, and check the box for Hidden items. (In general, we also recommend checking the box for displaying file name extensions.)

In Windows 7, 8, or 10, after you move a copy of the XLAM file into your AppData \ Roaming \ Microsoft \ AddIns folder, start Excel. Choose File > Options > Add-Ins. Your add-in will initially be listed in the Inactive Application Add-ins section, as shown below.
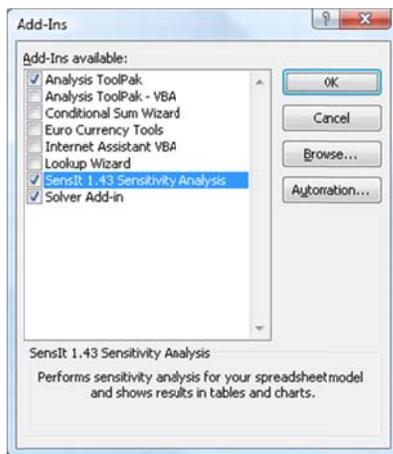
Figure 3.4 Excel 2007 – 2016 Excel Options Add-Ins Dialog Box

To activate the add-in, select Excel Add-ins in the Manage drop-down list shown above in the lower part of the screen, and then click the Go button.

The Add-In Manager dialog box appears as shown below in Figure 3.5. Check the box for your add-in. In this example, the name is SensIt 1.43 Sensitivity Analysis. After you check the box, click OK.

Figure 3.5 Excel 2007 – 2016 Add-In Manager

Windows Excel 2013 & 2016 Important Extra Step

In Excel 2013 & 2016 the add-in menu is not shown automatically the first time when the add-in is loaded. Instead, close all workbooks, quit Excel, and restart Excel to display the menu. After the first time you load the add-in, its menu will be displayed each time you start Excel 2013.

In Excel 2010 the add-in menu appears immediately.

At the Excel main display, choose the Add-Ins ribbon. In the Menu Commands area of the Add-Ins ribbon, select the menu item for the appropriate add-in: SensIt One-Input Plot, SensIt Tornado-Spider, SimVoi Simulation, or TreePlan Decision Tree. For more information, refer to the add-in user guide.

Windows Excel 2007 – 2016 Uninstalling an Add-in

First, to uninstall, uncheck the add-in name from the Add-in list. To do so, start Excel, and choose File > Options > Add-Ins > Manage Excel Add-Ins > Go. Uncheck the add-in name in the "Add-Ins available" list, click OK, and exit Excel.

Second, after you exit Excel, delete, move, or rename the XLAM file so that Excel can no longer find it. To delete the file, use Windows Explorer or File Explorer to navigate to the file location, select it, and press the Delete key. Or, instead of using Explorer, navigate using Start > Search programs and files.

After the XLAM file no longer exists where Excel expects to find it, when you next start Excel, if you select the add-in name in the "Add-Ins available" list, respond to the prompt to delete it from the list.

3.7 MAC EXCEL 2011 OPENING AN ADD-IN

This is the simplest method of using an add-in in Mac Excel 2011. This method is also preferred when using an add-in temporarily on another computer.

On Macintosh systems it is important to **not** double-click the XLAM file to open it. If you open the file by double-clicking, Excel does not execute some important code in the XLAM file that configures the add-in for Macintosh. For example, dialog boxes will not be displayed properly.

Launch Mac Excel 2011, and choose File > Open to open the XLAM file. A warning "This workbook contains macros" is displayed. Click the "Enable Macros" button. The add-in's features will be available during the current Excel session.

To now use the add-in, on the main menu bar of Mac Excel 2011 click the Tools menu, and choose SensIt One-Input Plot, SensIt Tornado-Spider, SimVoi Simulation, or TreePlan Decision Tree.

Shortcut keys are described in the user guide for each add-in. For example, the shortcut key for TreePlan in Mac Excel 2011 is Option+Cmd+t; that is, hold down the Option and Command keys, and press the t key.

After you quit Excel, if you want to use the add-in the next time you run Excel, you will have to open the XLAM file and enable macros again.

3.8 MAC EXCEL 2011 INSTALLING AN ADD-IN

To install an add-in so that its features are available whenever you use Mac Excel 2011, quit Excel, and perform the following steps just one time.

Paste a copy of the add-in XLAM file into the Applications > Microsoft Office 2011 > Office > Add-Ins folder.

> Step-by-step: Copy the TreePlan XLAM file (right-click or Ctrl-click the file icon, and choose Copy from the menu). In the Macintosh Finder, choose Go > Applications. Double-click the Microsoft Office 2011 folder, double-click the Office folder, and double-click the Add-Ins folder. Right-click or Ctrl-click, and choose Paste Item from the menu.

Launch Mac Excel 2011, choose Tools > Add-Ins, check the box for the add-in, and click OK.

To now use the add-in, on the main menu bar of Mac Excel 2011 click the Tools menu, and choose SensIt One-Input Plot, SensIt Tornado-Spider, SimVoi Simulation, or TreePlan Decision Tree.

Shortcut keys are described in the user guide for each add-in. For example, the shortcut key for TreePlan in Mac Excel 2011 is Option+Cmd+t; that is, hold down the Option and Command keys, and press the t key.

Mac Excel 2011 Uninstalling an Add-in

First, to uninstall, start Excel, choose Tools > Add-Ins, uncheck the add-in file name in the "Add-Ins available" list, and click OK.

Second, quit Excel, and then delete, move, or rename the XLAM file so that Excel can no longer find it.

The next time you start Excel, Excel may notify you that it cannot find the add-in file.

3.9 MAC EXCEL 2016 OPENING AN ADD-IN

This is the simplest method of using an add-in in Mac Excel 2016. This method is also preferred when using an add-in temporarily on another computer.

On Macintosh systems it is important to **not** double-click the XLAM file to open it. If you open the file by double-clicking, Excel does not execute some important code in the XLAM file that configures the add-in for Macintosh. For example, dialog boxes will not be displayed properly.

Launch Mac Excel 2016, and choose File > Open to open the XLAM file. A warning "This workbook contains macros" is displayed. Click the "Enable Macros" button. Also, the add-in may display a warning about using a shortcut key. The add-in's features will be available during the current Excel session.

To use the add-in in Mac Excel 2016, you must use the appropriate shortcut key:

SensIt One-Input **P**lot   Option+Command+p

SensIt Tornado-**S**pider   Option+Command+s

Si**m**Voi Si**m**ulation   Option+Command+v

TreePlan Decision **T**ree   Option+Command+t

For example, to use TreePlan in Mac Excel 2016, hold down the Option and Command keys, and press the t key.

After you quit Excel, if you want to use the add-in the next time you run Excel, you will have to open the XLAM file and enable macros again.

Compared to other versions of Excel on Mac and Windows, at the time of this writing in 2017, Excel for Mac 2016 continues to be an incomplete, evolving product. It is important that you keep it up-to-date. If you have a problem using one of our analytic add-ins, browse to the product Support page, and look at the Q&A items and version history to get the latest information:

- http://treeplan.com/support/
- http://sensitpro.com/support/
- http://simvoi.com/support/