

Installing SensIt, RiskSim, and TreePlan

3

3.1 INSTALLATION OVERVIEW

SensIt, RiskSim, and TreePlan are decision analysis add-ins for Microsoft Excel 2000–2010 (Windows) and Microsoft Excel 2004 & 2011 (Macintosh).

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

For each add-in, all of the functionality, including its built-in help, is a part of the single file in XLA 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 tryout 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 1.45.

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 the Installing an Add-in in Excel 2007 or 2010 section or at the end of the Installing an Add-in in Excel 2003 section.

3.3 THE ADD-IN XLA FILE

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

A typical filename for the downloaded software would be SensItSetupStandard145.zip. If you are using a Windows operating system, double-click the ZIP file and choose Extract all files, or right-click 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 XLA files will be bundled into a single ZIP file.

After you have extracted the XLA 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.

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- 3.9 Installing an Add-in in Excel 2011 (Macintosh)
- 3.10 Other Methods for Excel 2000-2010

The instructions for Excel 2003 are generally appropriate for earlier versions of Windows Excel.

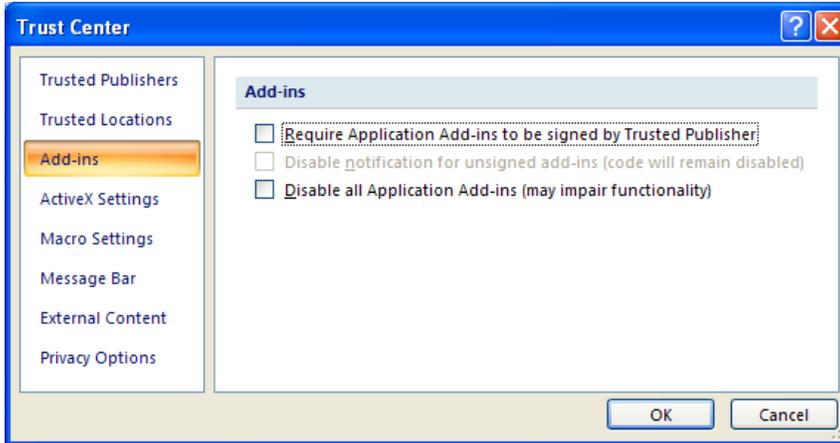
3.4 OPENING AN ADD-IN IN EXCEL 2007 OR 2010

This is the simplest method. This method is also preferred when using an add-in temporarily on another computer. Start Excel. In Excel 2007, choose Office Button | Open. In Excel 2010, choose File | Open.

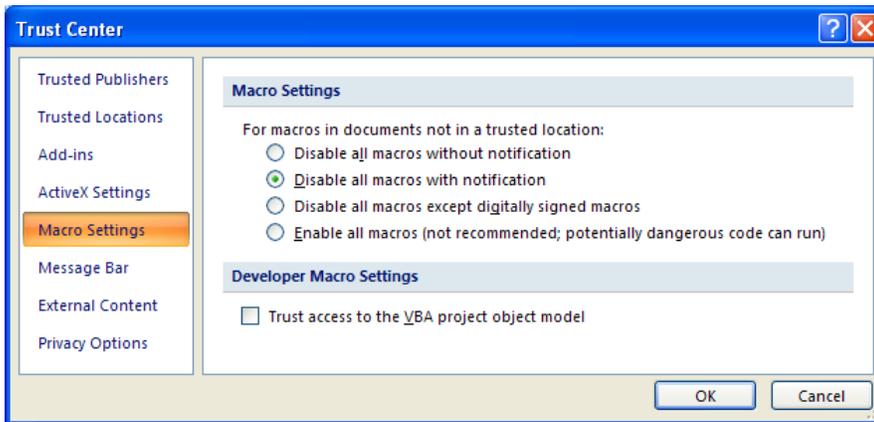
Be sure to start Excel and use Excel's command to open the XLA file. Do not double-click the XLA file to open it. If you open the file by double-clicking, Excel may not execute some important code in the XLA file that configures the add-in for your system.

Excel 2007 and 2010 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. In Excel 2007, choose Office Button | Excel Options | Trust Center | Trust Center Settings | Add-ins. In Excel 2010, 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 or 2010 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 or 2010 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 2007, choose Office Button | Open. In Excel 2010, choose File | Open. Navigate to the location of the add-in XLA file, select the file, and click Open. The screen below appears.

Figure 3.3 Excel 2007 or 2010 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: Sensitivity Analysis (SensIt), Risk Simulation (RiskSim), or Decision Tree (TreePlan). For more information, refer to the add-in user guide.

3.5 INSTALLING AN ADD-IN IN EXCEL 2007 OR 2010

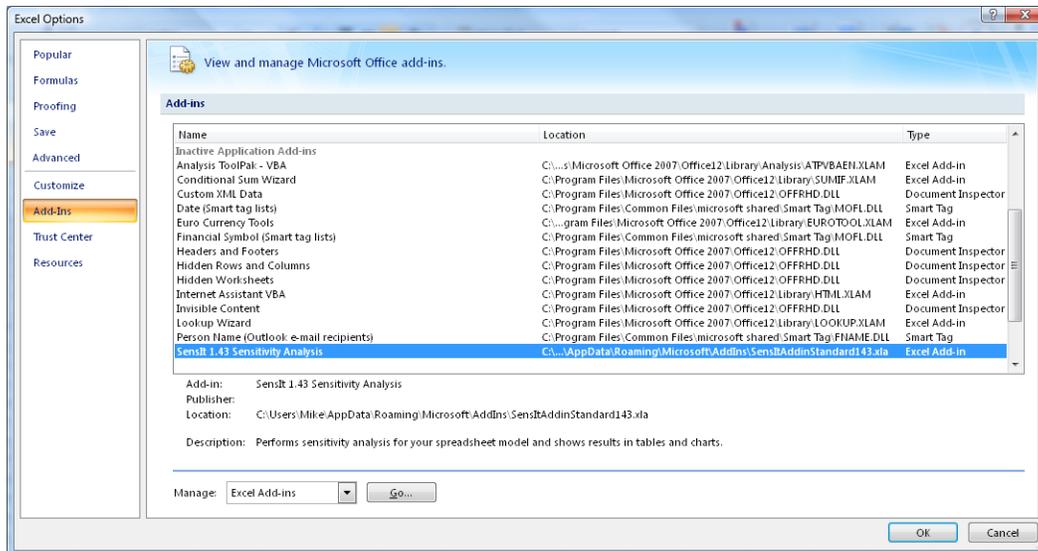
Windows 7, Windows Vista, and other operating systems allow multiple users of a single computer to partition and thus share the computer, with an Administrator maintaining overall control. If you have Administrator privileges and Excel 2010, you could copy the add-in XLA file to the C:\Program Files\Microsoft Office\Office14\Library folder. (“Office14” refers to Office 2010, and “Office12” refers to Office 2007.)

In Windows 7 or Windows Vista, if you do not have Administrator privileges, move the XLA file into the C:\Users\UserName\AppData\Roaming\Microsoft\AddIns folder.

If you do not see the AppData folder in your UserName folder, it may be hidden. To view the folder, choose Start | UserName | Organize | Folder and search options | View. In the Advanced settings, click the option button for “Show hidden files, folders, and drives.”

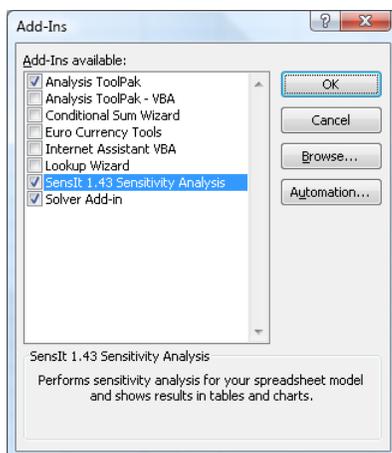
In Windows XP, if you do not have Administrator privileges, move the file into the C:\Documents and Settings\UserName\Application Data\Microsoft\AddIns folder.

In Windows 7 or Windows Vista, after you move a copy of the XLA file into your AppData\Roaming\Microsoft\AddIns folder, start Excel 2010 or 2007. In Excel 2007, choose Office Button | Excel Options | Add-Ins. In Excel 2010, 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 or 2010 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 or 2010 Add-In Manager

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: Sensitivity Analysis (SensIt), Risk Simulation (RiskSim), or Decision Tree (TreePlan). For more information, refer to the add-in user guide.

Uninstalling an Add-in in Excel 2007 or 2010

To uninstall, first delete, move, or rename the XLA file so that Excel can no longer find it. To delete the file, use Windows Explorer to navigate to the file location, select it, and press the Delete key. Or, instead of using Windows Explorer, navigate in Windows XP using My Computer or in Windows Vista or Windows 7 using Start | Computer.

After the XLA file no longer exists where Excel expects to find it, next delete it from the Add-in list. Start Excel 2007, and choose Office Button | Excel Options | Add-Ins | Manage Excel Add-Ins | Go. Or, start Excel 2010, and choose File | Options | Add-Ins | Manage Excel Add-Ins | Go. Uncheck the add-in file name in the "Add-Ins available" list, and respond to the prompt to delete it from the list.

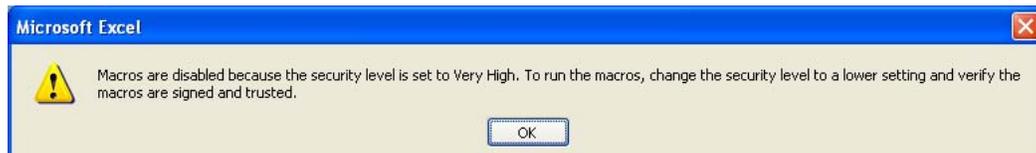
3.6 OPENING AN ADD-IN IN EXCEL 2003

This is the simplest method of using an add-in in Excel 2003 or earlier versions. This method is also preferred when using an add-in temporarily on another computer. Start Excel 2003, and choose File | Open.

Do not double-click the XLA file to open it. If you open the file by double-clicking, Excel may not execute some important code in the XLA file that configures the add-in for your system.

When you use Excel to open SensIt or RiskSim on Windows computers, if Excel's security level is set to High or Very High, you may see a warning similar to Figure 3.6.

Figure 3.6 Excel 2003 Security Warning With Very High Security Level

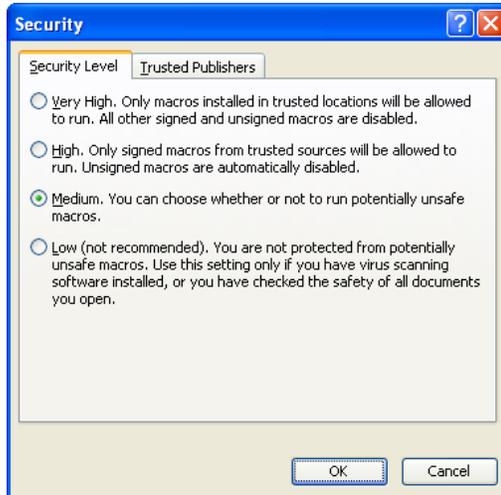


When you use Excel to open TreePlan on Windows computers, if Excel's security level is set to High or Very High, you may see a warning similar to Figure 3.7. The warning is somewhat different because TreePlan is written in a different language from SensIt and RiskSim.

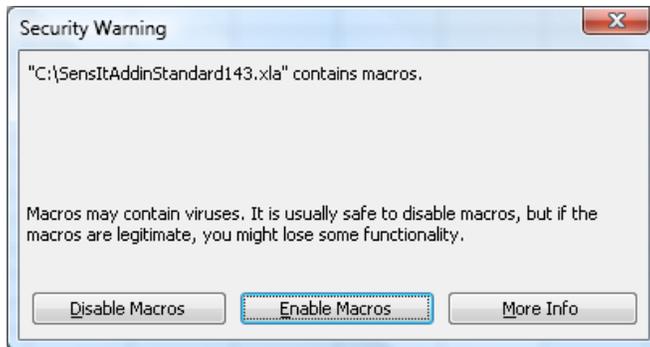
Figure 3.7 Excel 2003 Security Warning For TreePlan



Since each of the products is an unsigned macro, it is automatically disabled if Excel's security level is High or Very High. To use your add-in, start Excel 2003, choose Tools | Macro | Security | Security Level, click Medium, and click OK, as shown in Figure 3.8. Then choose File | Open to load the add-in XLA file.

Figure 3.8 Excel 2003 Tools Macro Security Level

If the Security Level is set to Medium or Low when you open the add-in XLA file, you may see the warning shown in Figure 3.9. Click the Enable Macros button.

Figure 3.9 Excel 2003 Security Warning With Medium Security Level

To now use your add-in, on Excel's main menu bar click the Tools menu, and choose Sensitivity Analysis (SensIt), Risk Simulation (RiskSim), or Decision Tree (TreePlan).

3.7 INSTALLING AN ADD-IN IN EXCEL 2003

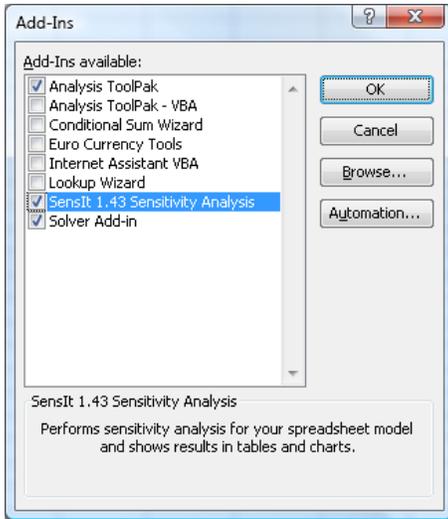
Windows Vista and other operating systems allow multiple users of a single computer to partition and thus share the computer, with an Administrator maintaining overall control. If you have Administrator privileges, copy the add-in XLA file to the C:\Program Files\Microsoft Office\Office11\Library folder. ("Office 11" refers to Office 2003.)

In Windows Vista, if you do not have Administrator privileges, move the file into the C:\Users*UserName*\AppData\Roaming\Microsoft\AddIns folder.

In Windows XP, if you do not have Administrator privileges, move the file into the C:\Documents and Settings \ *UserName* \ Application Data \ Microsoft \ AddIns folder.

Start Excel 2003, and choose Tools | Add-Ins. The Add-In Manager dialog box appears as shown below in Figure 3.10.

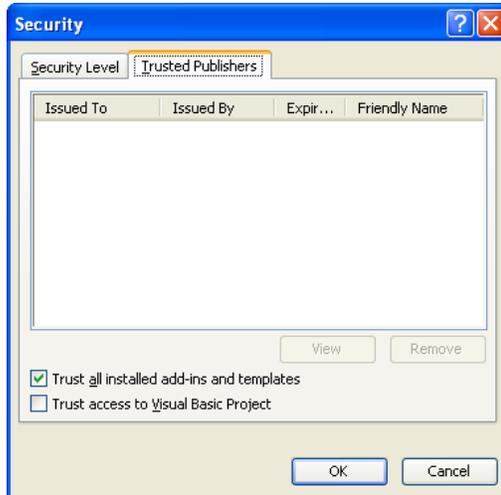
Figure 3.10 Excel 2003 Add-In Manager



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.

To now use your add-in, on Excel's main menu bar click the Tools menu, and choose Sensitivity Analysis (SensIt), Risk Simulation (RiskSim), or Decision Tree (TreePlan).

Since the Library and AddIns folders are trusted locations, you can set the security level to High or Very High and avoid security warnings when the add-in is loaded. Follow the settings as shown in the screen below. Choose Tools | Macro | Security | Trusted Publishers, check the box for "Trust all installed add-ins and templates," and click OK. Close Excel and start it again. Note that this tells Excel to trust all installed add-ins, not just SensIt, RiskSim, and TreePlan.

Figure 3.11 Excel 2003 Tools Macro Security Trusted Publishers

In summary, if you put the add-in XLA file in the Library or AddIns folder on a Windows computer, you should choose Tools | Macro | Security | Trusted Publishers, and check the box for "Trust all installed add-ins and templates."

Uninstalling an Add-in in Excel 2003

To uninstall, first delete, move, or rename the XLA file so that Excel can no longer find it. To delete the file, use Windows Explorer to navigate to the file location, select it, and press the Delete key. Or, instead of using Windows Explorer, navigate in Windows XP using My Computer or in Windows Vista using Start | Computer.

After the XLA file no longer exists where Excel expects to find it, next delete it from the Add-in list. Start Excel, choose Tools | Add-Ins, uncheck the add-in file name in the "Add-Ins available" list, and respond to the prompt to delete it from the list.

3.8 OPENING AN ADD-IN IN EXCEL 2011

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 XLA file to open it. If you open the file by double-clicking, Excel does not execute some important code in the XLA 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 XLA 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 Sensitivity Analysis (SensIt), Risk Simulation (RiskSim), or Decision Tree (TreePlan).

Shortcut keys are described in the user guide for each add-in. For example, the shortcut key for TreePlan in Mac Excel 2011 is Options+Cmd+T, that is, hold down the Options 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 XLA file and enable macros again.

3.9 INSTALLING AN ADD-IN IN EXCEL 2011

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 XLA file into the Applications > Microsoft Office 2011 > Office > Add-Ins folder.

Step-by-step: Copy the TreePlan XLA 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 Sensitivity Analysis (SensIt), Risk Simulation (RiskSim), or Decision Tree (TreePlan).

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

Uninstalling an Add-in in Excel 2011

To uninstall, first quit Excel, and then delete, move, or rename the XLA file so that Excel can no longer find it. After the XLA file no longer exists where Excel expects to find it, next delete it from the Add-in list. To do so, start Excel, choose Tools | Add-Ins, uncheck the add-in file name in the "Add-Ins available" list, and respond to the prompt to delete it from the list.

3.10 OTHER METHODS FOR EXCEL 2000-2010

Another method for using an add-in is to place the add-in XLA file in Excel's XLStart folder, where it will be automatically opened when you start Excel without being installed via the add-in manager. And yet another method is to place the XLA file in any arbitrary folder and then install it using the add-in manager.

Add-In File in XLStart Folder

For Windows computers, if you have Administrator privileges, copy the add-in XLA file to the C:\Program Files \ Microsoft Office \ Office \ XLStart folder. The file will be opened every time you start Excel.

In Windows Vista, if you do not have Administrator privileges, move the file into the C:\Users \ *UserName* \ AppData \ Roaming \ Microsoft \ Excel \ XLStart folder.

In Windows XP, if you do not have Administrator privileges, move the file into the C:\Documents and Settings \ *UserName* \ Application Data \ Microsoft \ Excel \ XLStart folder.

If you put the add-in XLA file in an XLStart folder on a Windows computer, you should choose Tools | Macro | Security | Trusted Publishers, and check the box for "Trust all installed add-ins and templates."

For Macintosh, copy the add-in XLA file to the Macintosh HD : Applications : Microsoft Office : Office : Startup : Excel folder.

To uninstall an add-in, delete the XLA file or move the XLA file from the Windows XLStart folder or from the Macintosh Startup : Excel folder.

Add-In File in Arbitrary Folder

Copy the add-in XLA file to a folder of your choice on the hard drive. For Windows computers with Excel 2003, start Excel, and choose Tools | Add-Ins | Browse. In Excel 2007, choose Office Button | Excel Options | Add-Ins | Manage Add-Ins | Go | Browse. In Excel 2010, choose File | Options | Add-Ins | Manage Add-Ins | Go | Browse. After you click the Browse button to the right of the Add-Ins Available list box in the add-in manager, navigate to the location of the add-in XLA file, select it, and click OK. Subsequently, you can use the Add-Ins Available dialog box to load or unload the add-in as needed by checking or unchecking the add-in's checkbox.

If you put the add-in XLA file in an arbitrary folder on a Windows computer and specify its location using Browse navigation, in Excel 2003 you should choose Tools | Macro | Security | Trusted Publishers, and check the box for "Trust all installed add-ins and templates." In Excel 2007 or 2010, you may need to modify Trust Center settings.

For Macintosh, start Mac Excel 2004, choose Tools | Add-Ins | Select, navigate to the location of the add-in XLA file, select it, and click Open.

Excel's add-in manager keeps track of the location of the XLA file. To uninstall an add-in, first delete, move, or rename the XLA file so that Excel can no longer find it. After the XLA file no longer exists where Excel expects to find it, start Excel, choose the add-in manager, check or uncheck the add-in's box, and answer the prompt for deleting the add-in from the list.