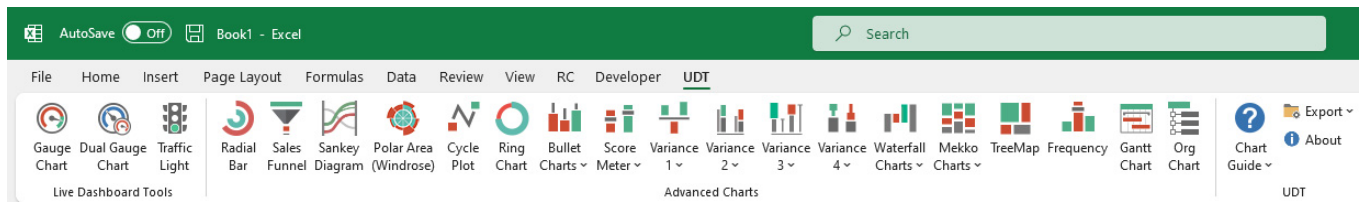# Installation and Technical Guide
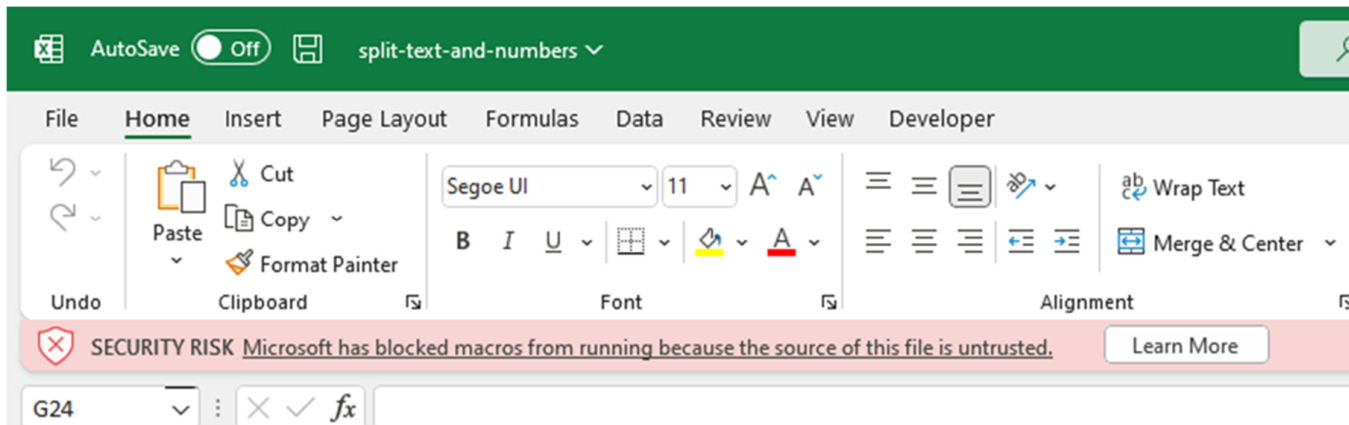

To install Ultimate Dashboard Tools for Excel, follow the steps below:

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**
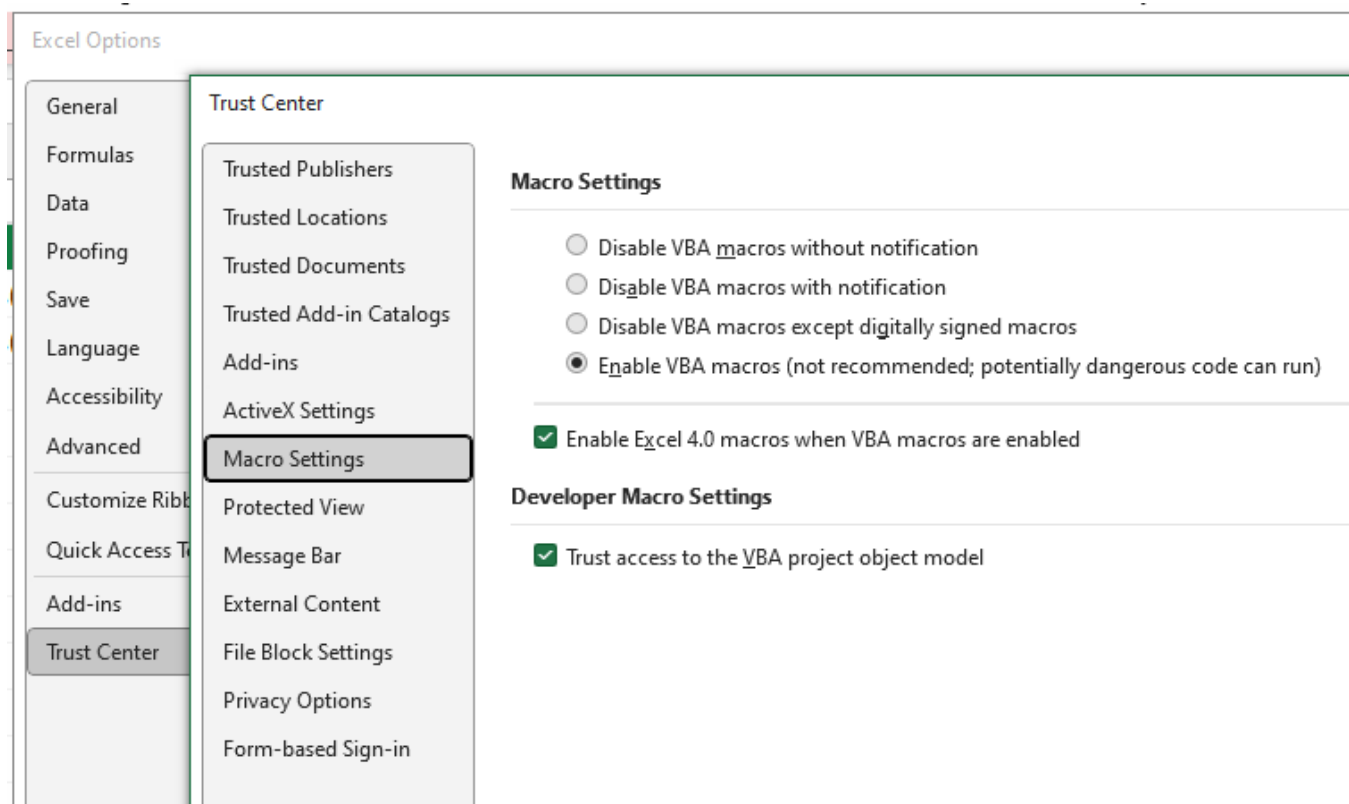4. **Install the add-in**

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.

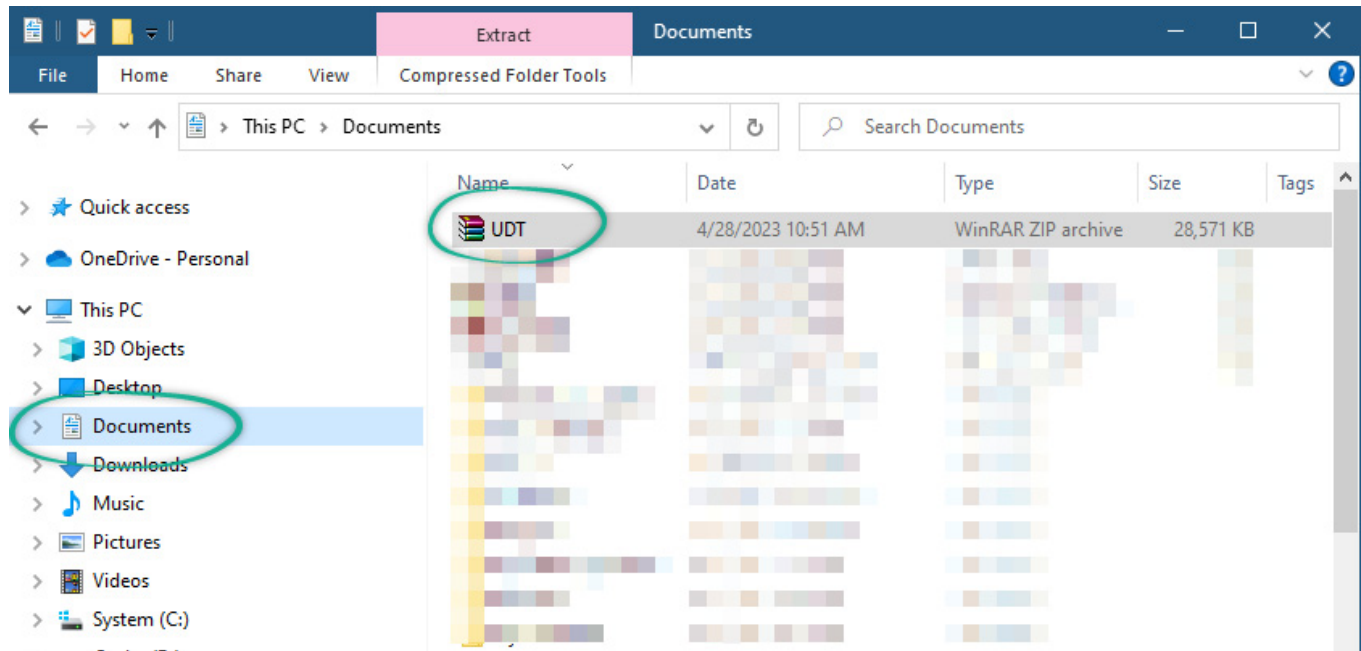**What should I do now?** To unblock macros, use the following setup:

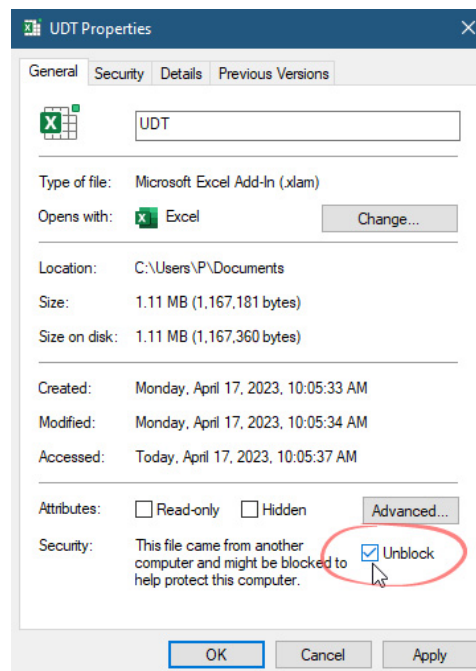**File -> Options -> Trust Center -> Macro Settings**

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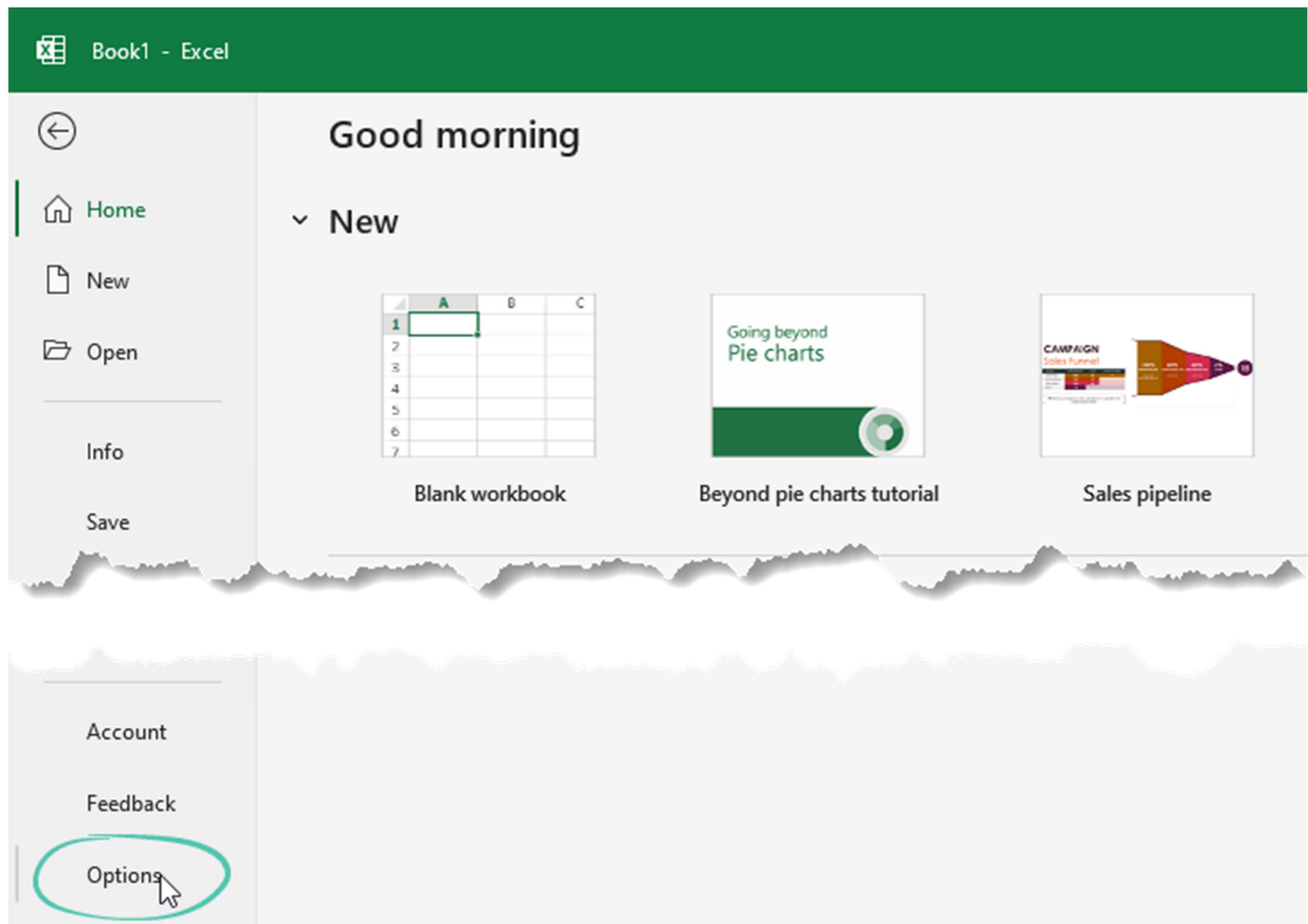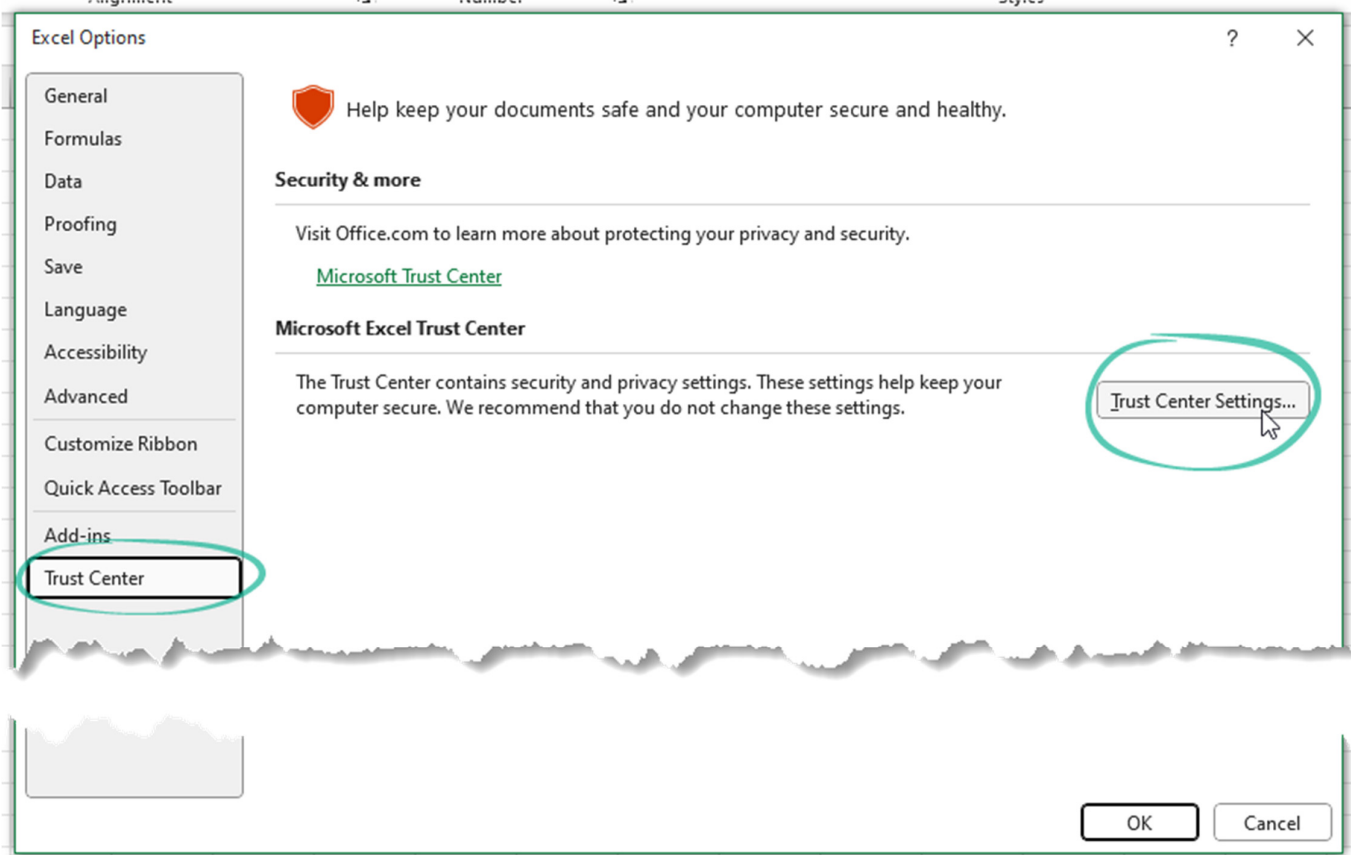
3. Store the Add-in in a Trusted Location

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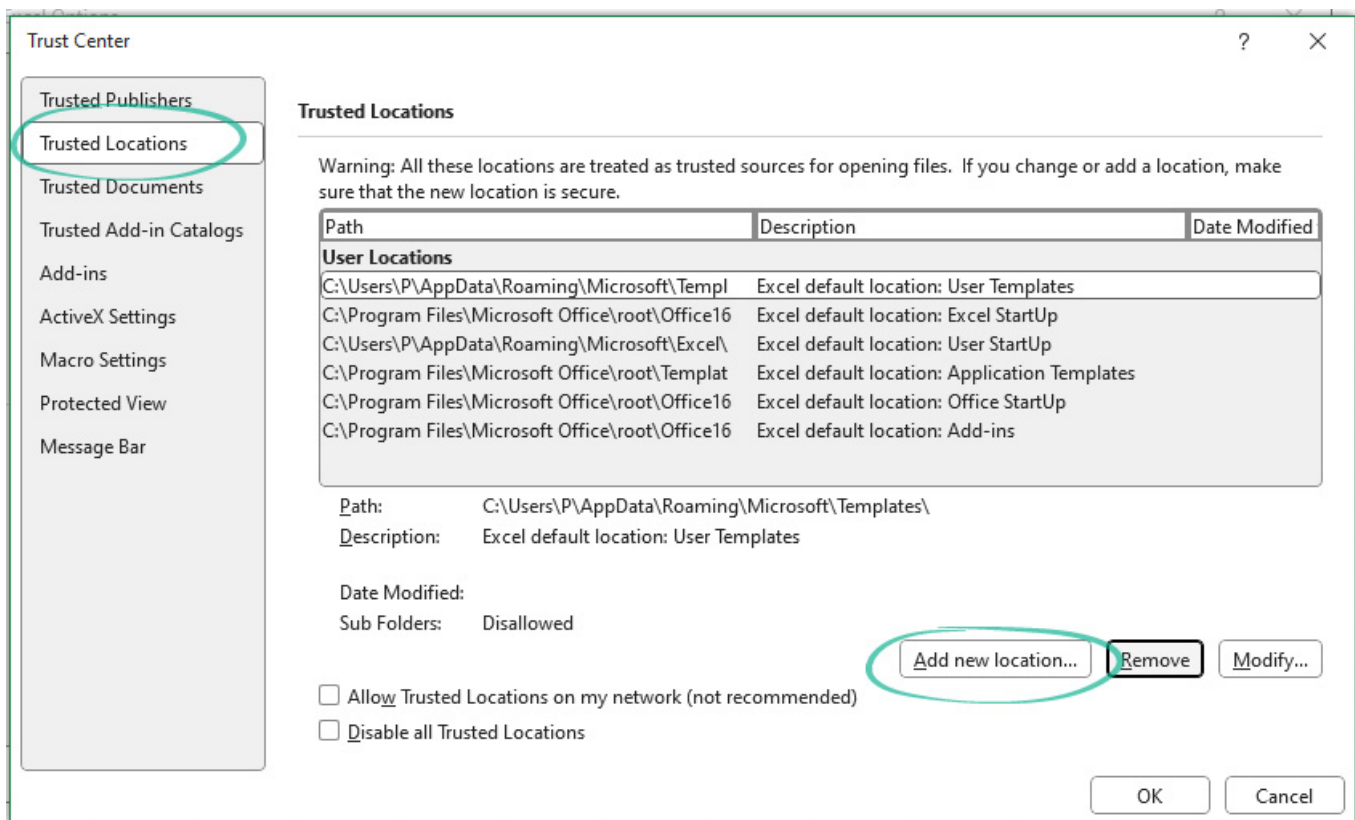
Open the Trusted Locations menu:
Choose File > Options

Trust Center > Trust Center Settings.

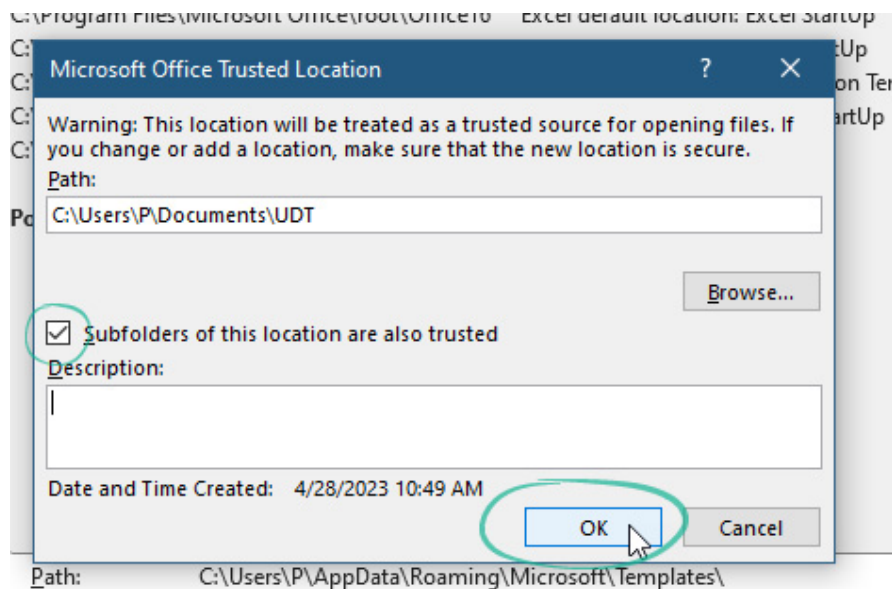
Click **Trusted Locations** > Click the **Add new location button**.

Click **Browse**

Navigate to the folder that contains your add-in files and press OK.

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:
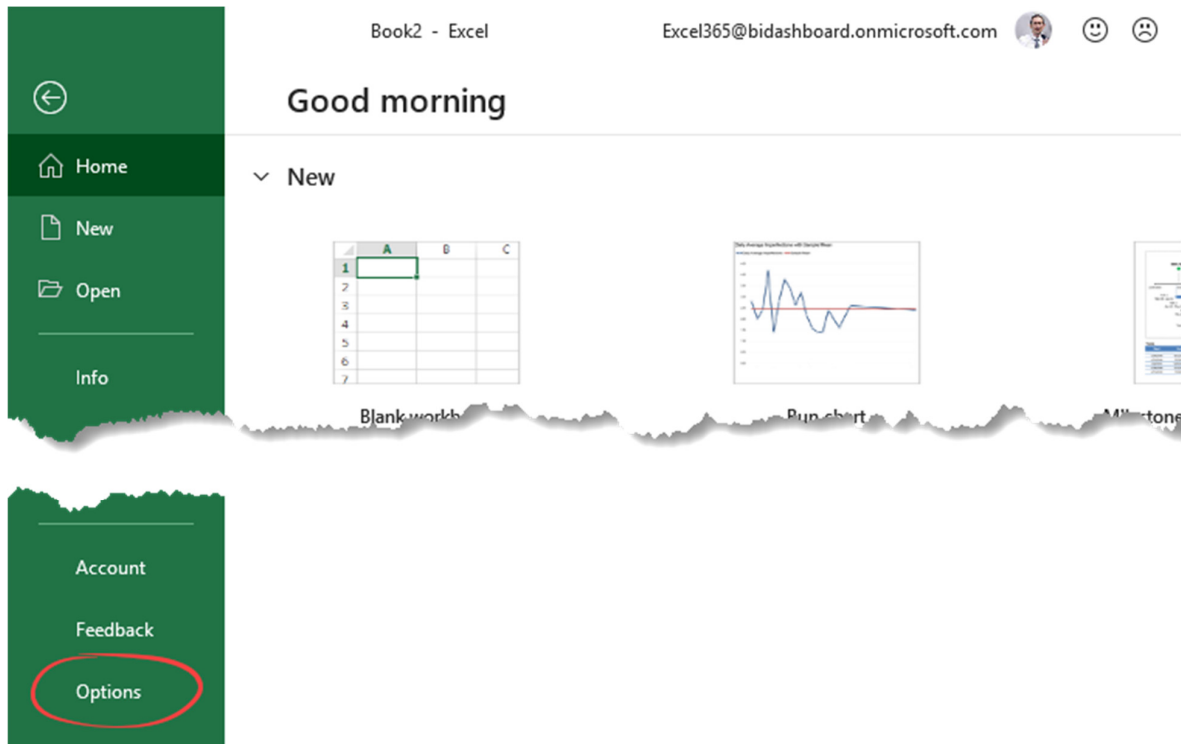
How to Install an Excel Add-in:
https://youtu.be/mIpncmYhNGk

How to Re-enable an add-in that is Disabled or Missing:
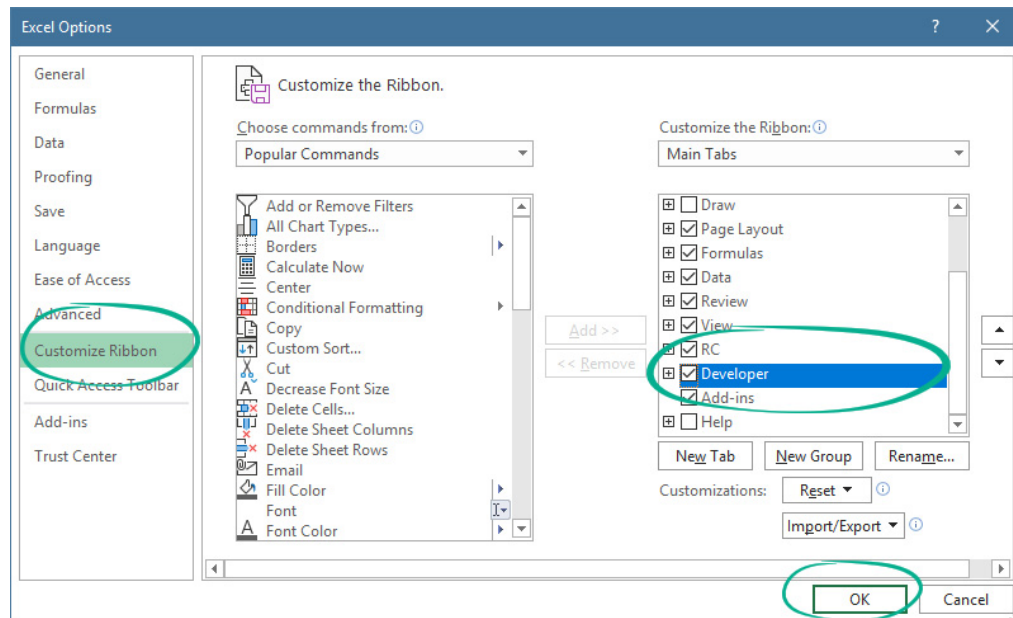https://youtu.be/AaTkENoIh08
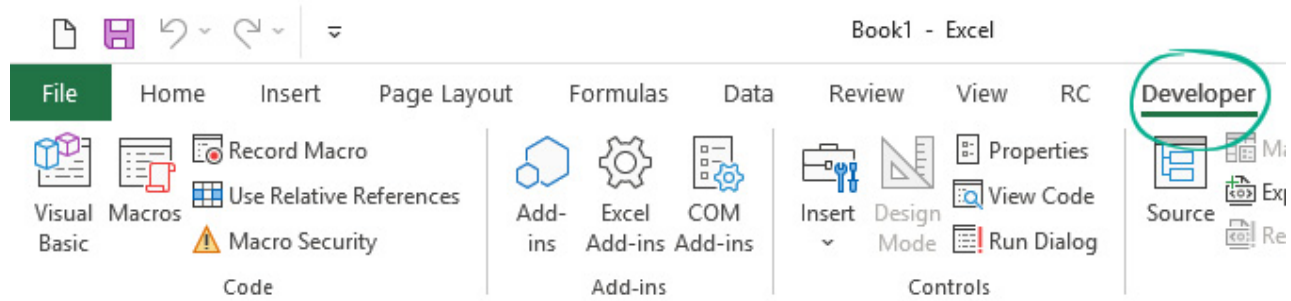
4. Install the add-in

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.
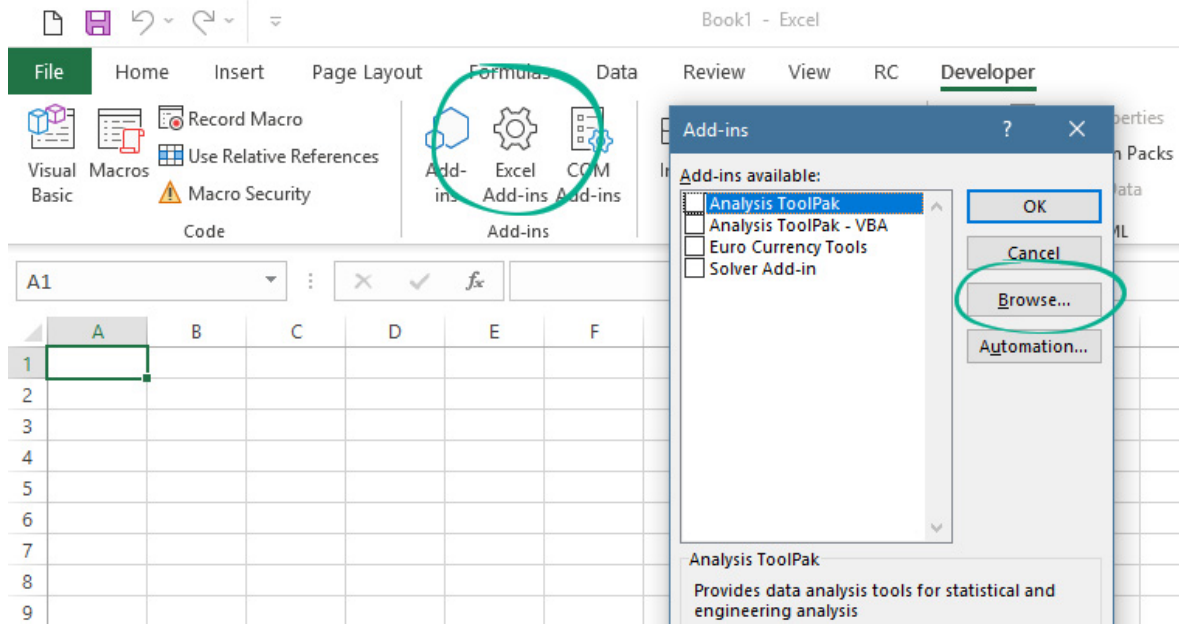

Select the Customize Ribbon option, and ensure the Developer Tab is checked. Click OK.
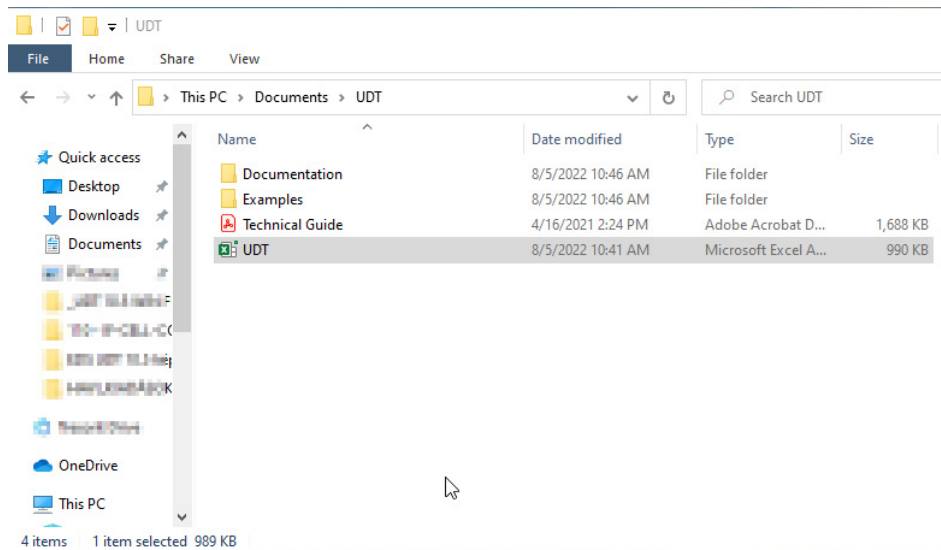
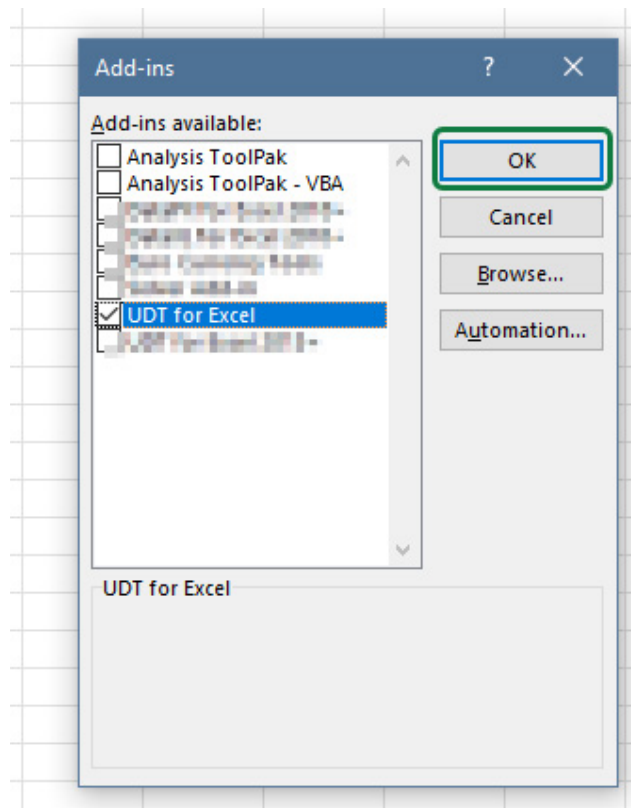

The **Developer Tab** is installed.

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!