Table of Contents

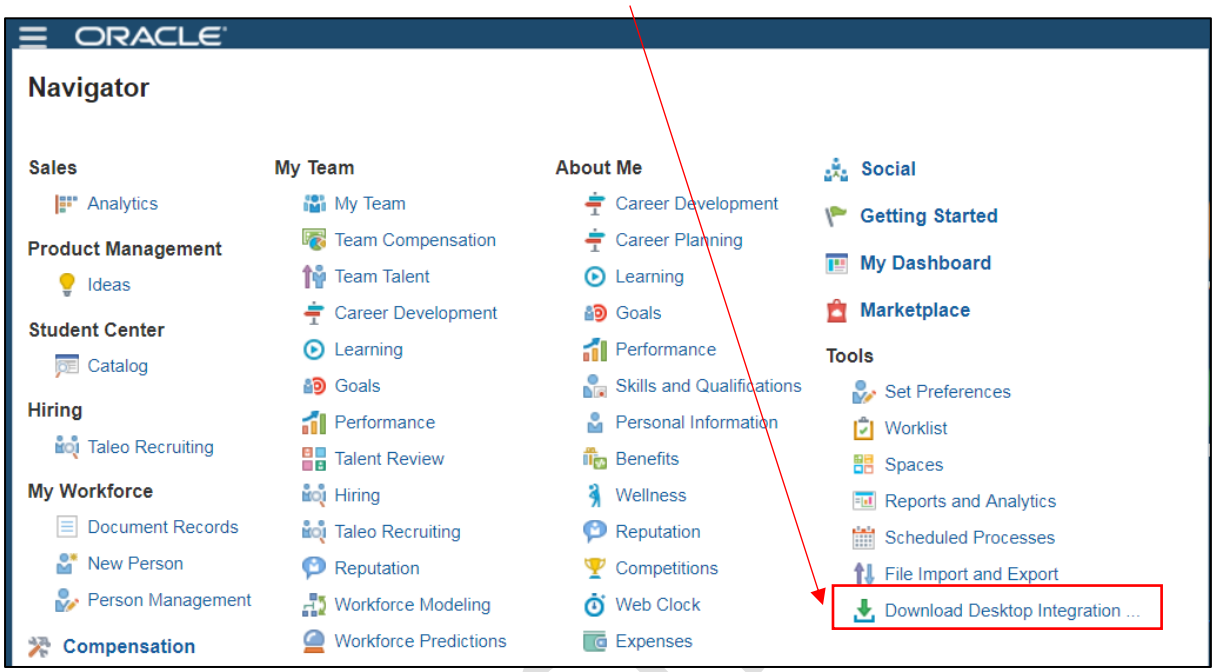
Install Desktop Integration Tool 2
Change Excel Settings 4
Example of Manage in Spreadsheet 10

iavinash.com

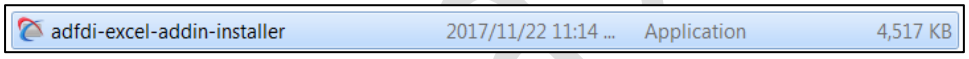
Install Desktop Integration Tool

01 Login to fusion instance and click on home icon

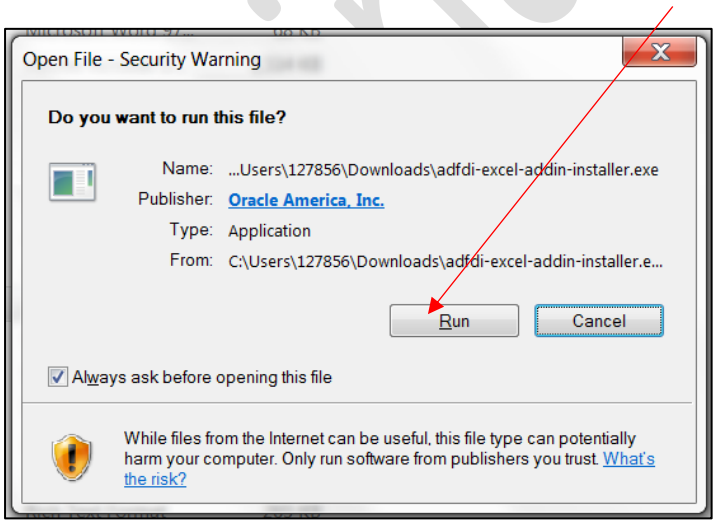
02 Click on Navigator and then click on Download Desktop Integration available under Tools



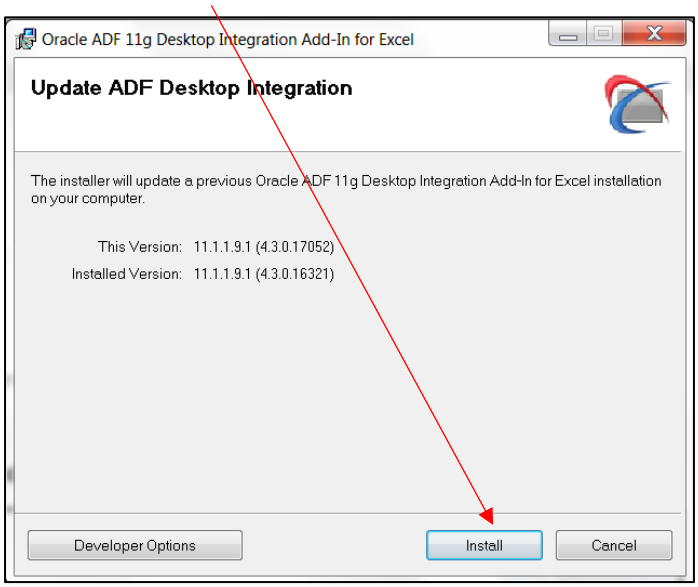
03 This will download a file “adfdi-excel-addin-installer”



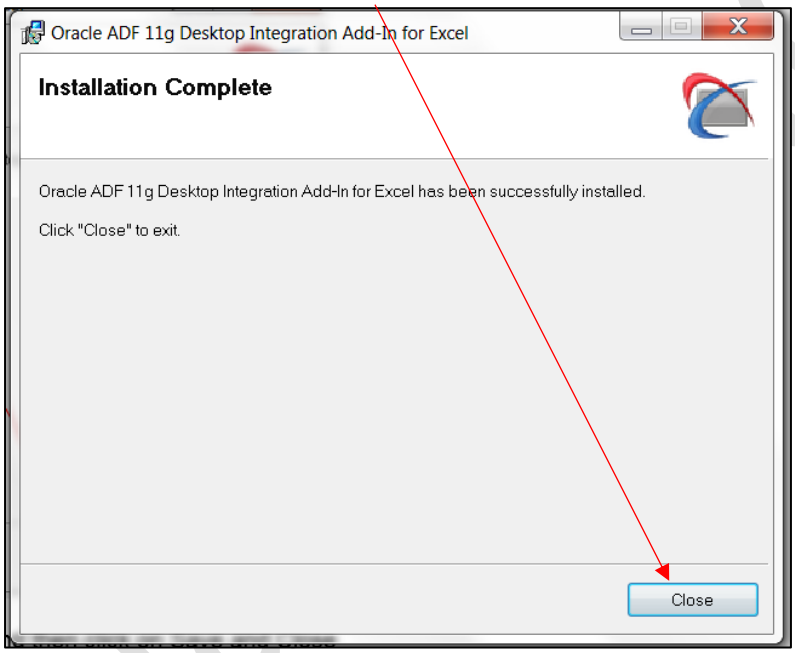
04 Double click on that file to install. Click on Run



05 Click on Install

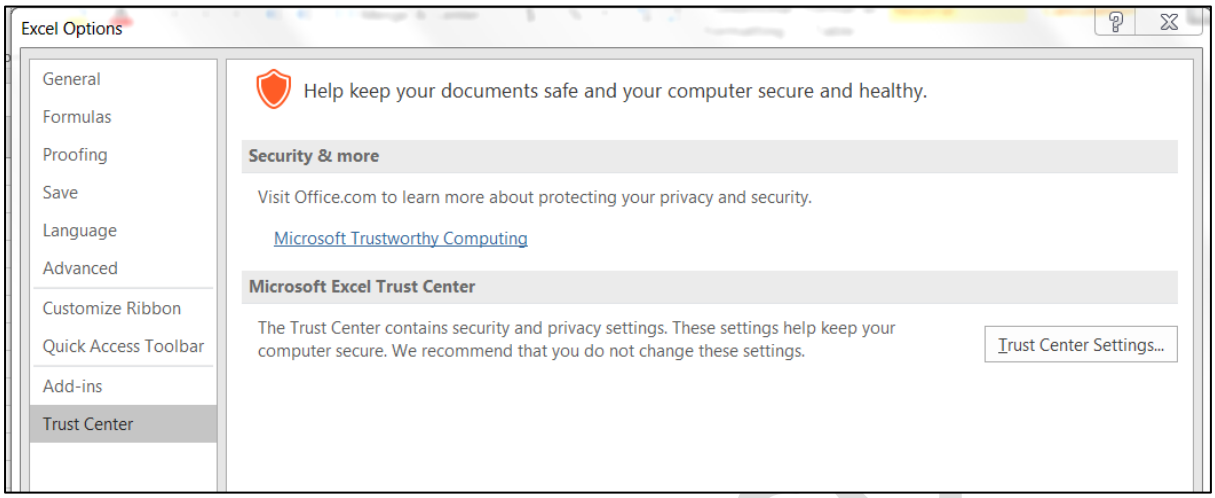


06 Click on Close when installation is completed.

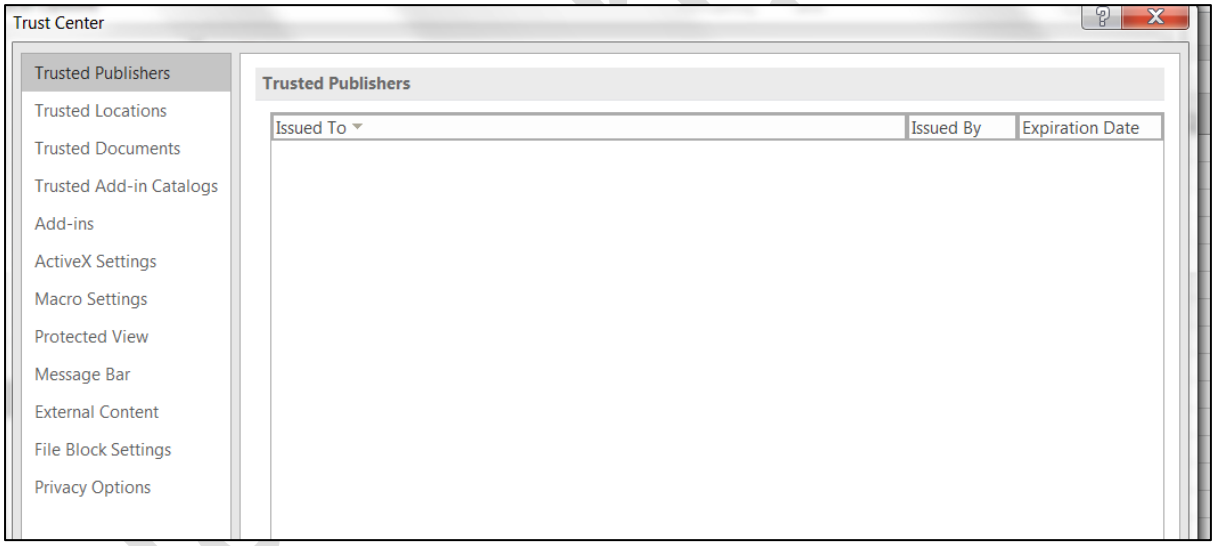


Change Excel Settings

01 Open a blank excel and navigate to File » Option » Trust Center » You will see an image like below (screenshots are from excel 2016)



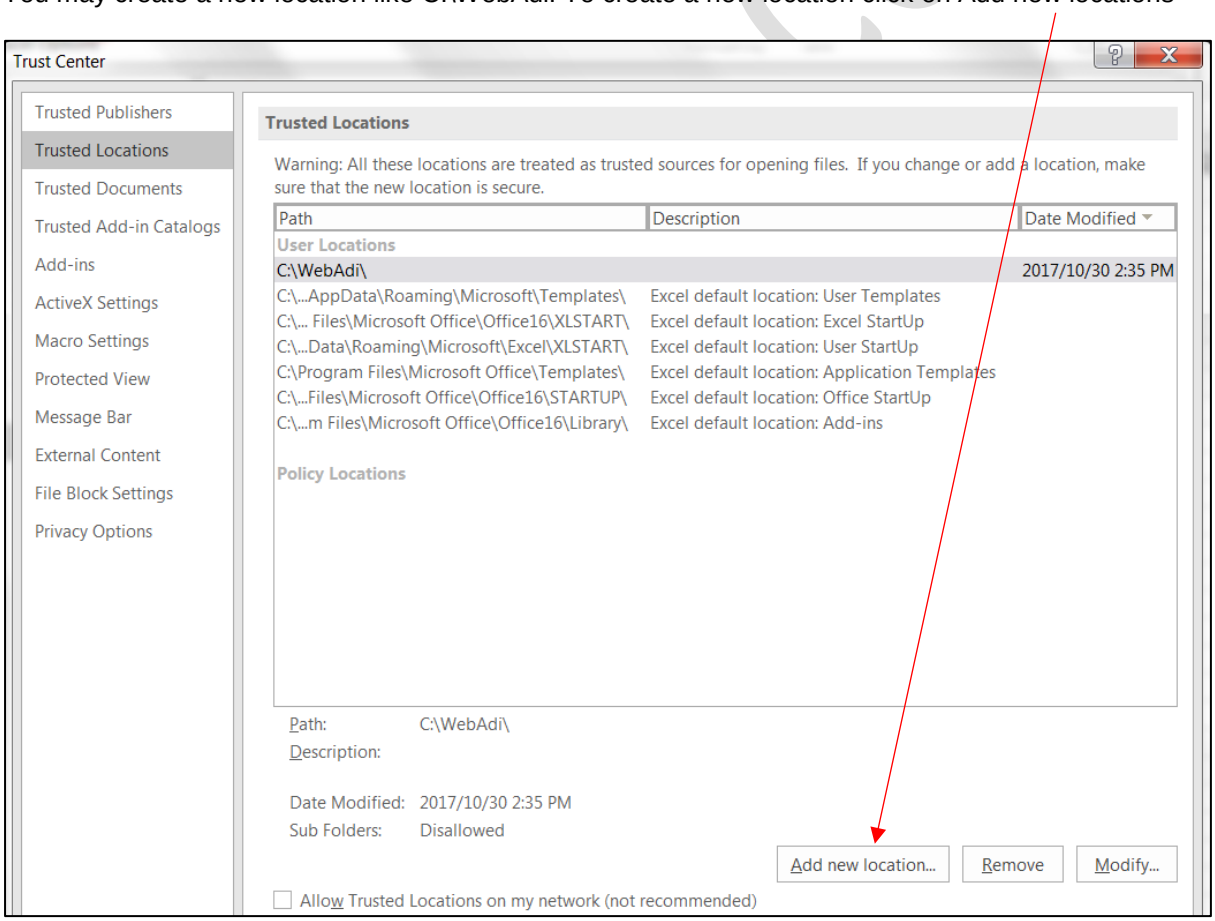
02 Click on “Trust Center Setting” and you will see below screen.



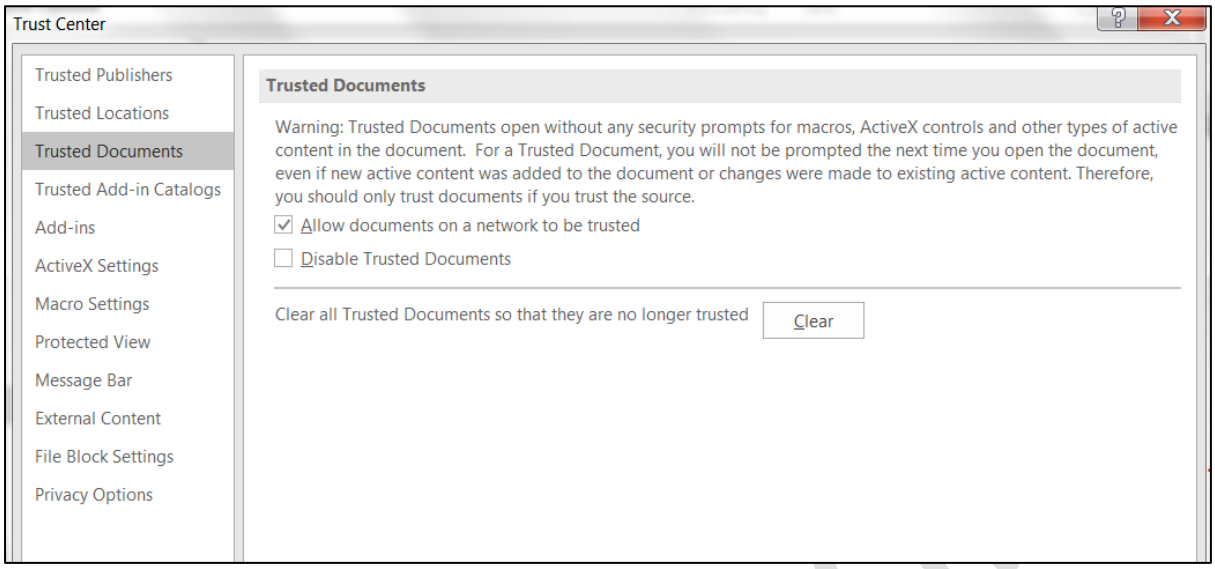
03 Now click on the tabs given at left hand side one by one and update the settings as per the screenshot

04 Tab → Trusted Publisher

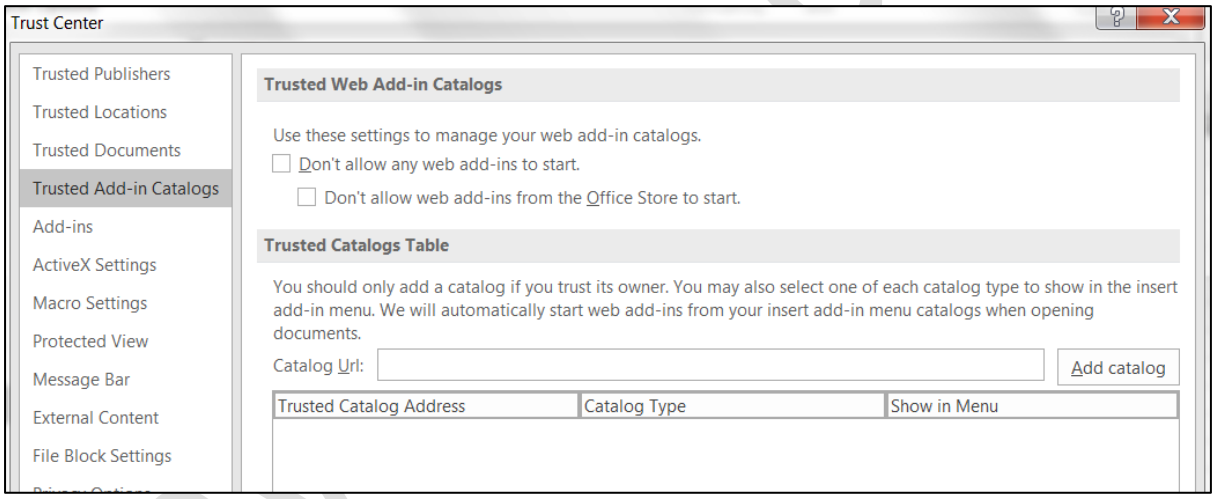
05 Tab → Trusted Locations
You may create a new location like C:\WebAdi. To create a new location click on Add new locations



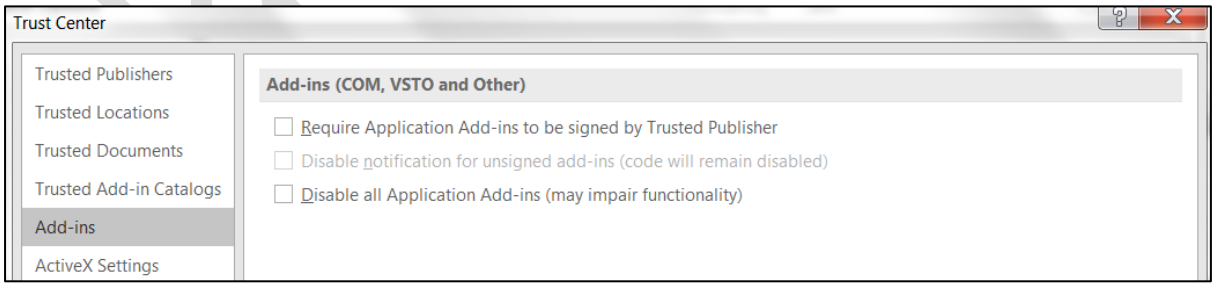
06 Tab → Trusted Document



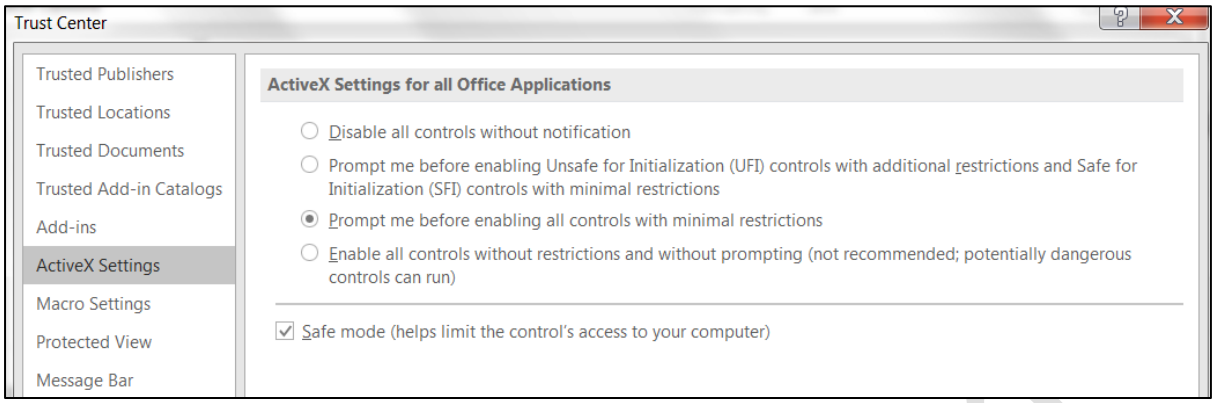
07 Tab → Trusted Add-in Catalogs



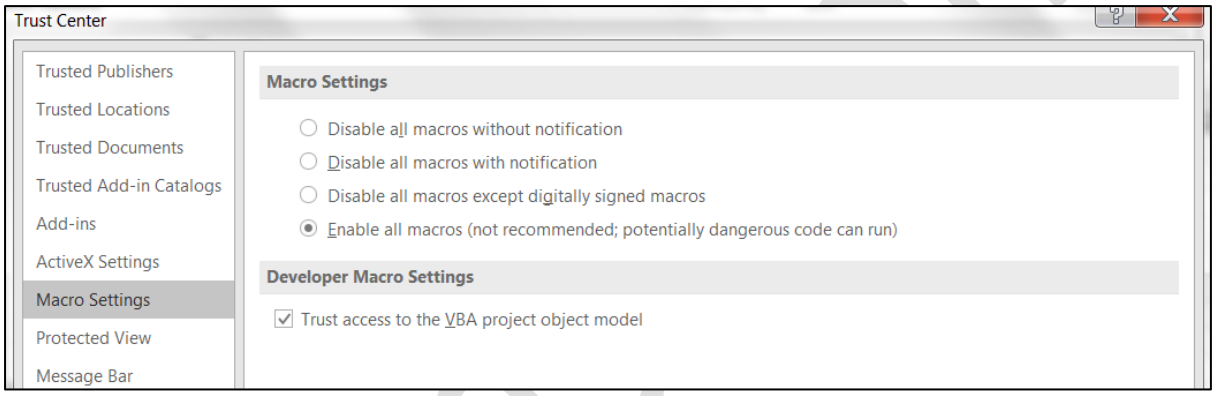
08 Tab → Trusted Add-ins



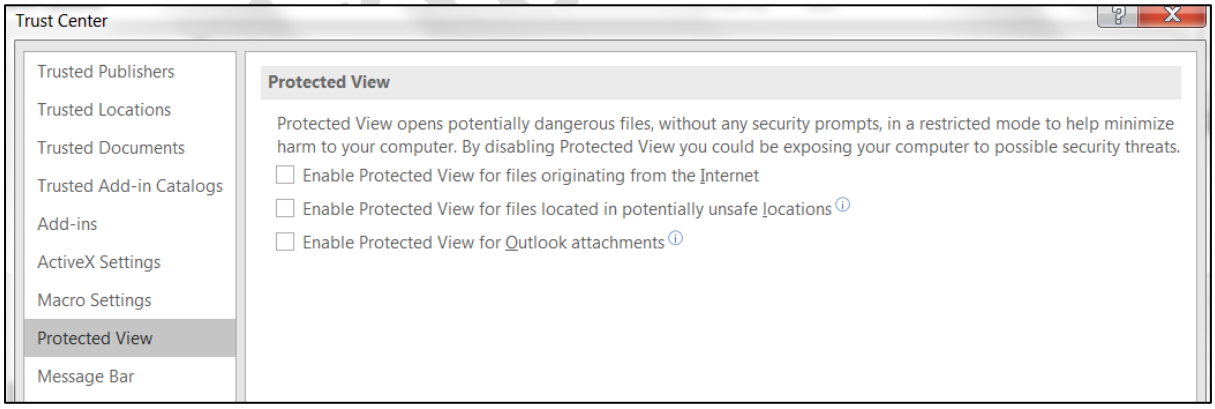
09 Tab → ActiveX Settings



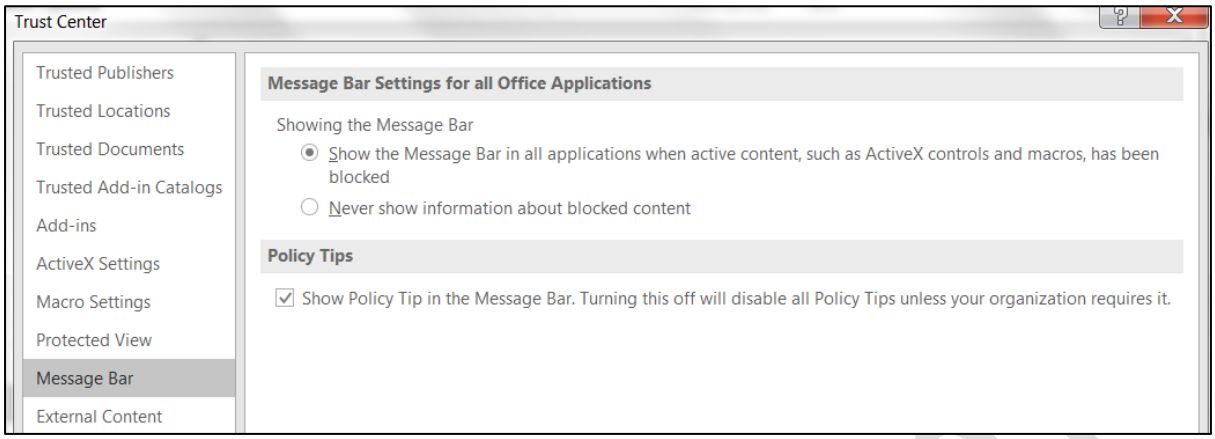
10 Tab → Macro Settings



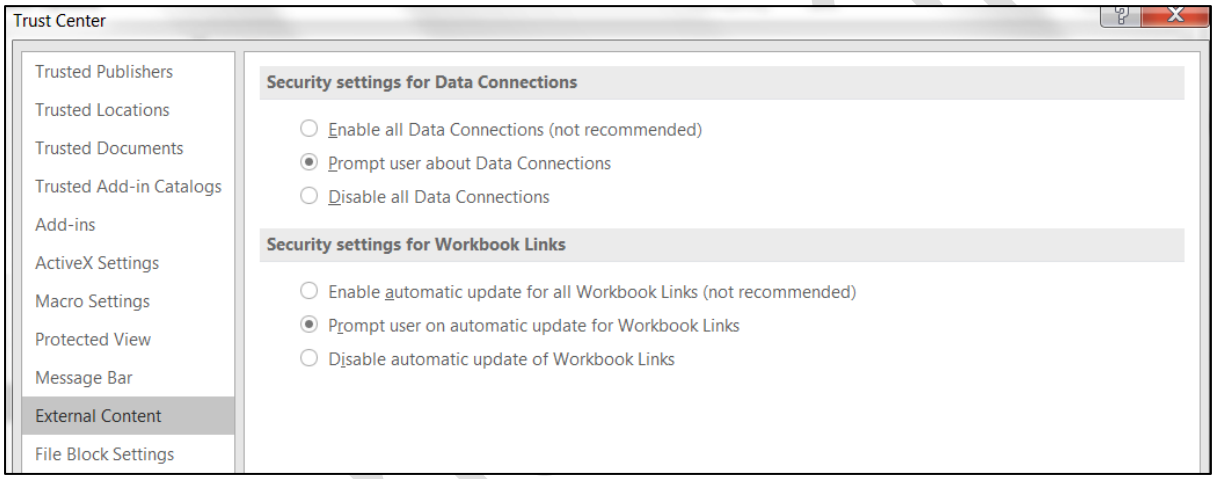
11 Tab → Protected View



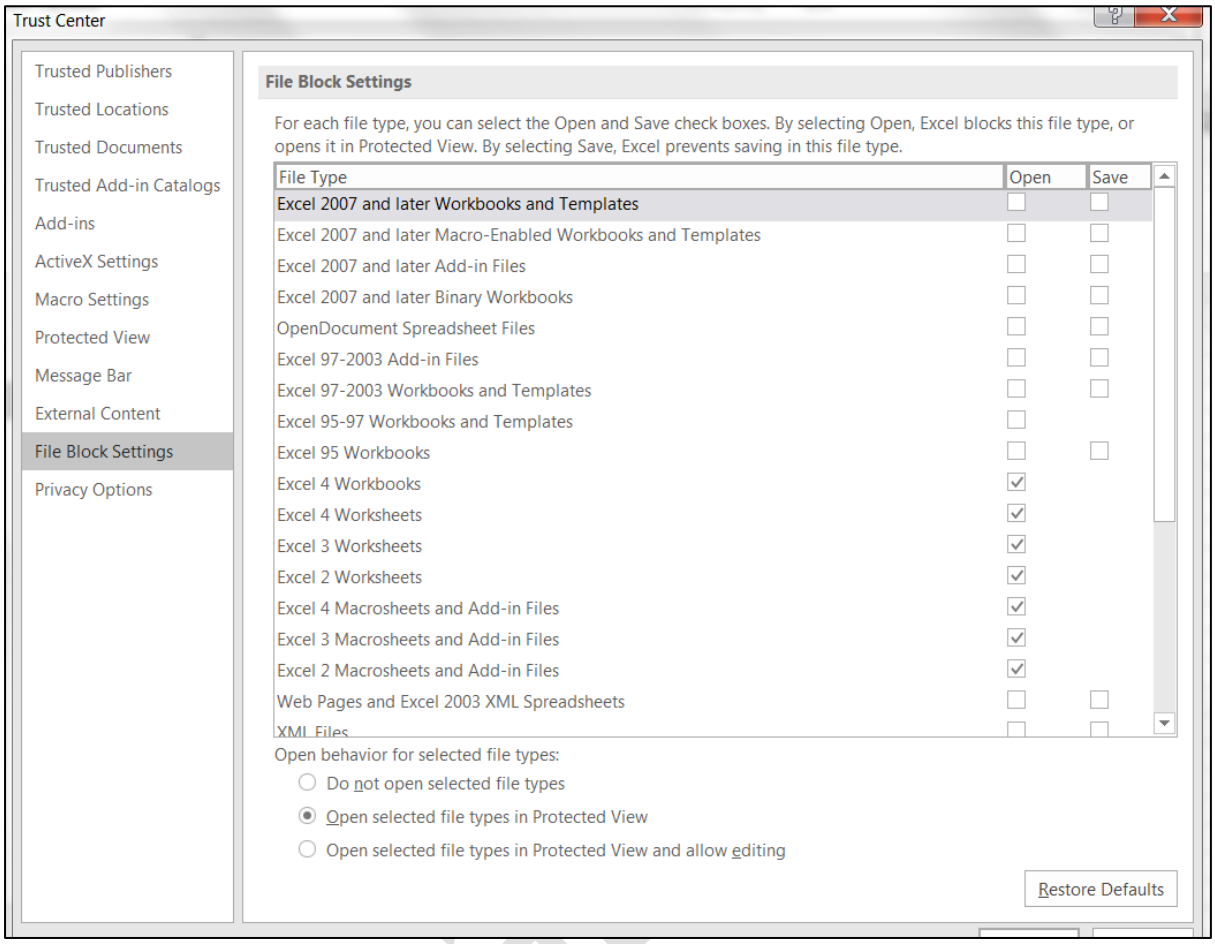
12 Tab → Message Bar



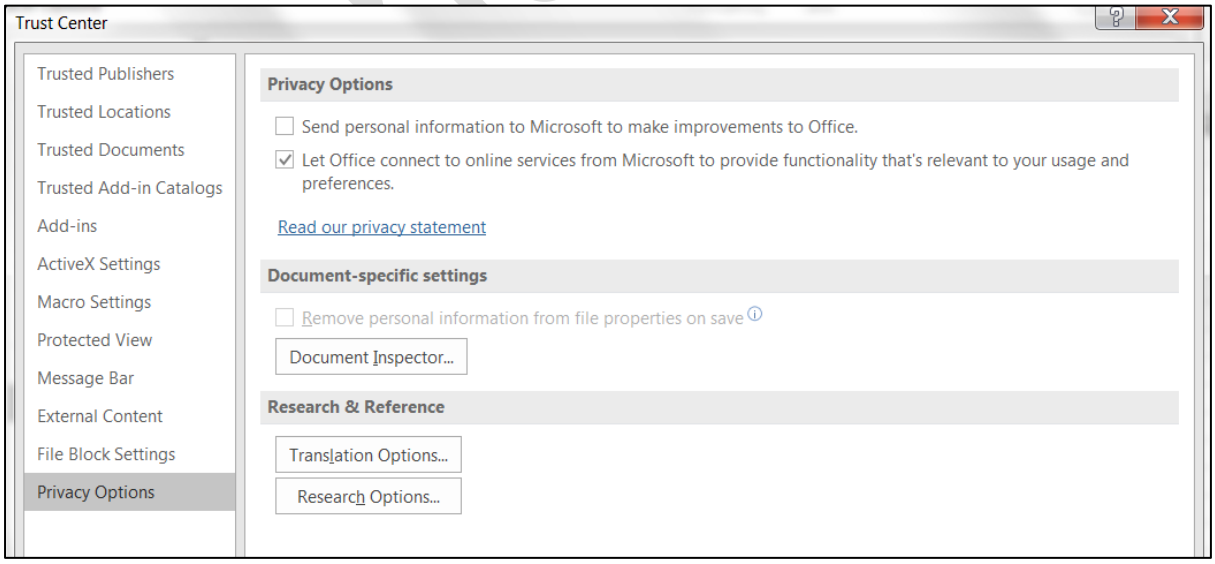
13 Tab → External Content



14 Tab → File Block Settings

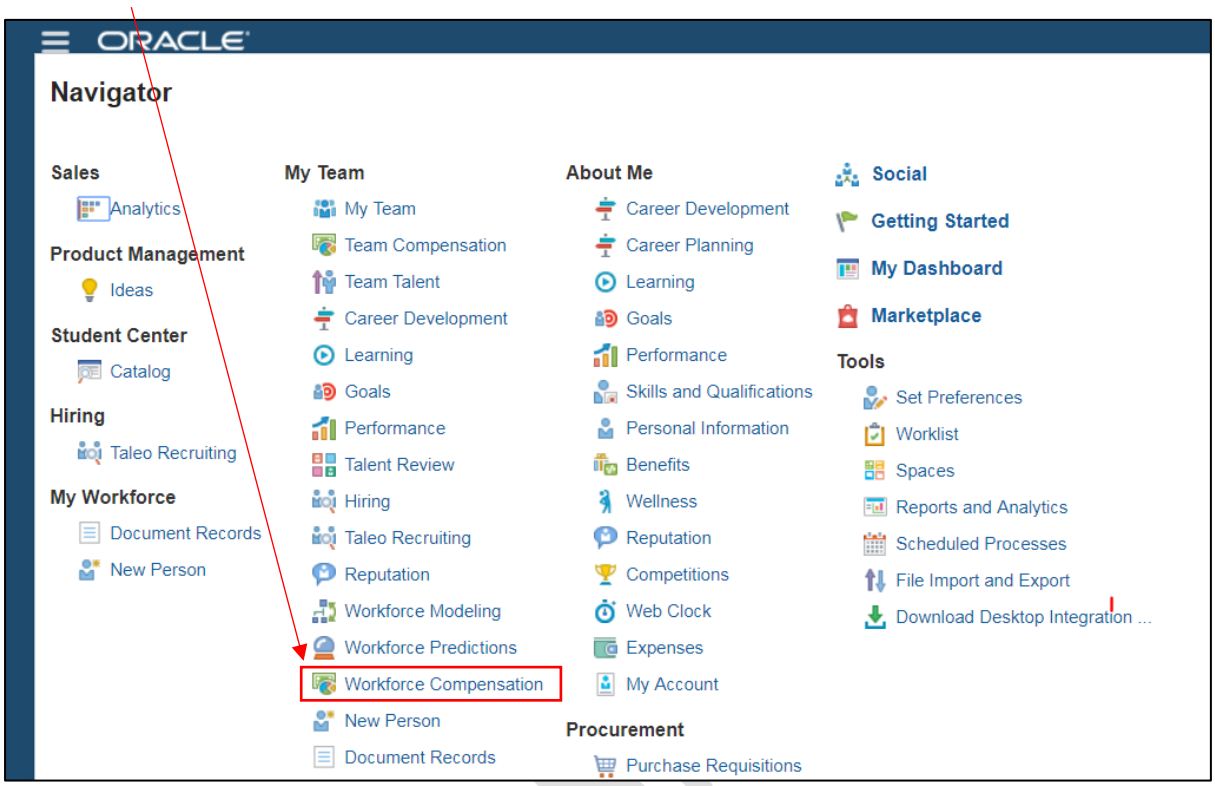


15 Tab → Privacy Option



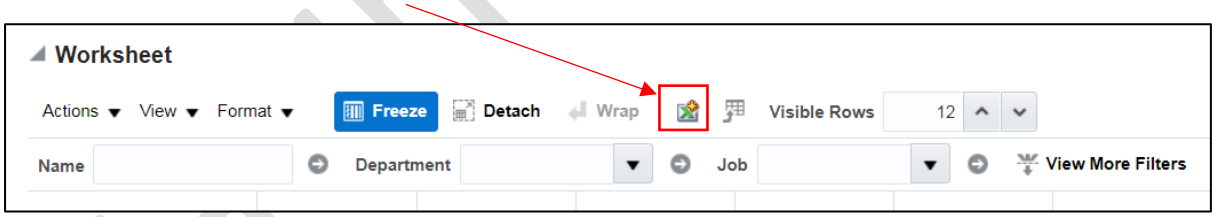
Example of Manage in Spreadsheet

01 Click on the navigator and then click on Workforce Compensation available under **My Team**

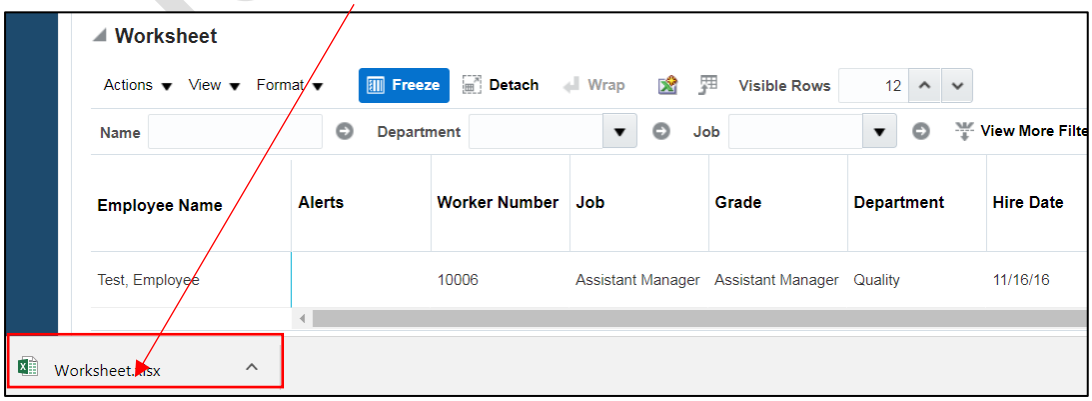


02 Click on the Plan name

03 Under the Worksheet section click on the Manage in Spreadsheet option.

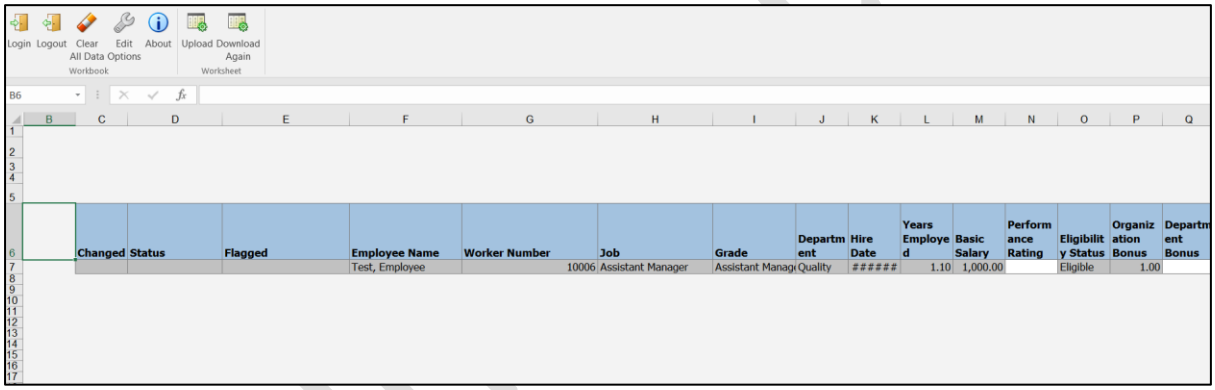


04 This will down load an excel sheet.

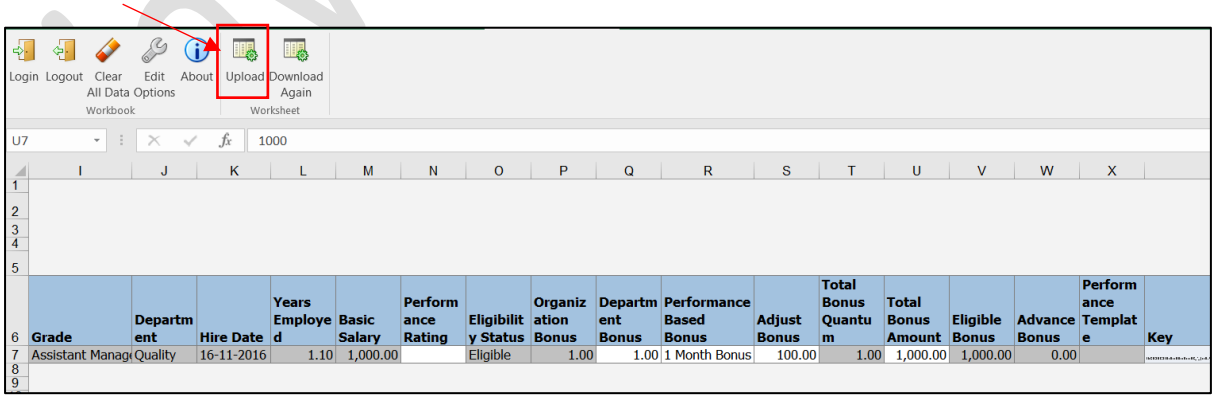


05 Double click on the file and you will be asked to login.

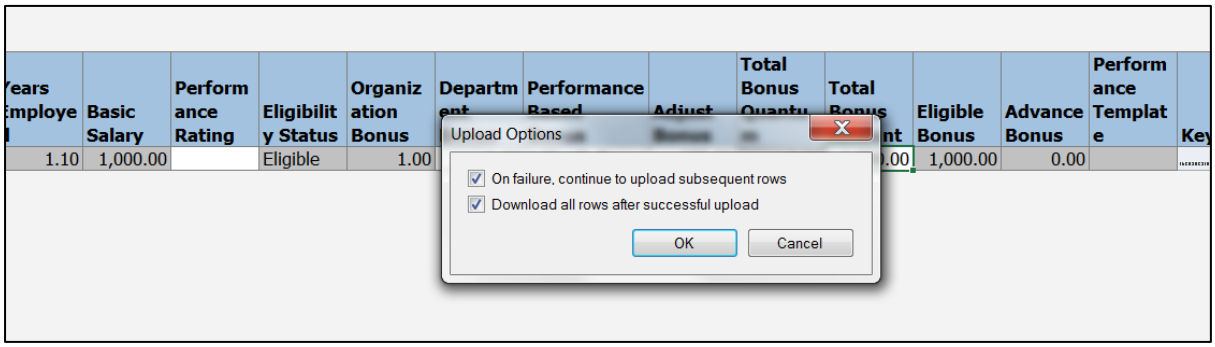
06 After successful login it will download all the data from managers worksheet.



07 Do the necessary changes and then click on upload.



08 You may make following choices and then click on OK.



09 You will receive confirmation that data has been uploaded

iavinash.com