



Intratec Data Excel Add-in

Tutorial (with Videos)

Introduction

Using the Intratec Data Excel Add-In is simple and straightforward — most users can get started just by following the steps listed on each section.

If at any point you'd like extra guidance, every step includes a link to a detailed explanation from the [online tutorial](#), which includes videos whenever you see  in the link.

Account Setup

Before using the Intratec Data Excel Add-In, confirm that your account is eligible. The Add-In is available only to **Advanced and Ultimate Plan subscribers** with the **Developer** role.

▶ [See how to set up the Developer role](#)

Installation Step-by-Step

Check the [Intratec Data Excel Add-In system requirements](#) before installation.

Step 1: Download

[Download the Intratec Data Excel Add-In.](#)

Step 2: Save

Save the Excel Add-In file to the MS Excel Add-Ins folder and unblock the file.

▶ [See video tutorial](#)

Step 3: Enable the Excel Add-In

Enable the Intratec Data Excel Add-In to see Intratec Data Tab on MS Excel.

▶ [See video tutorial](#)

Intratec Data Tab: Buttons & Features

Once installed, Intratec Data Excel Add-In will display a tab called **Intratec Data** in MS Excel Ribbon.



The Intratec Data Excel Add-In Ribbon bar includes the following icons:

Account	 Login	Login	Access your account
Data	 Get Series Info	Get Series Info	Retrieve series information
	 Insert Template	Insert Template	Generate a template sheet
	 Get Series Values	Get Series Values	Fetch series values
	 Usage Limits	Usage Limits	Verify requests made and limits
Support	 Release Notes	Release Notes	Open the Intratec Release Notes page
	 About Add-In	About Add-In	Check Add-In details
	 Tutorial	Tutorial	Quick access to step-by-step tutorial

Accessing Data Step-by-Step

Step 1: Log In

Go to the **Intratec Data** tab on the Ribbon and click **Login**. Enter the Developer account credentials.

 [See video tutorial](#)

Step 2: Load Assessments List

Click **Get Series Info** to insert a sheet listing all assessments in your subscription.

 [See video tutorial](#)

Step 3: Select Assessments

In the new sheet, use Excel filters to find assessments and select them by ticking checkboxes.

 [See video tutorial](#)

Step 4: Insert Template with Selected Assessments

Click **Insert Template** to create template sheets prefilled with the assessments selected in Step 3.

 [See video tutorial](#)

Step 5: Load Series Values

Click **Get Series Values** to connect to Intratec servers and load the data into the template sheets.

 [See video tutorial](#)

Customizing an Existing Template

After you insert a template for the first time, you can still [▶ add or remove assessments](#).

You may also edit the template to [▶ select your preferred currency and units](#) among the available options to display assessments series values.

Monitoring and Managing Requests

The limit of available data requests depends on your subscription plan. [See how request limits work](#).

You may [▶ monitor your request limits](#) directly from Excel by clicking **Usage Limits**.

Important Tip: Use the connection options in the template to test the Excel Add-In without spending requests or to prevent making duplicated requests. [▶ See video tutorial](#)

System Availability

The **Intratec Data Excel Add-In** is available 24/7, ensuring you can access data at any time.

Please note, the service may be temporarily unavailable during scheduled maintenance. [See maintenance schedule](#).

Support Features

▶ **Check for Intratec Data Excel Add-In updates** by clicking **About Add-In** under Intratec Data tab.

You may also use the Intratec Data Excel Add-In to quickly track new assessments under your subscription by ▶ **checking the Release Notes**.

Questions & Feedback

For assistance, feel free to reach out at <https://www.intratec.us/help/contact-us>.

We value your feedback! If you have complaints, compliments, or suggestions, don't hesitate to share them with us!