

---

## **DATA DIRECT 5.0 INSTALL GUIDE**

August 30, 2019

Northern Trust has implemented security enhancements and is rolling out a new version of Data Direct to be compatible with these enhancements. This means that All Data Direct users will be required to upgrade from their current version of Data Direct to Data Direct 5.0.

## PRE-CHECK

The following steps need to be completed before installing Data Direct 5.0

### 1. Minimum system requirements for Data Direct 5.0:

- Microsoft® Windows® 7 and above.
- Microsoft Office Excel 2010, Excel 2013, Excel 2016 or Office 365.
- Net Framework 3.5 SP1, Preferably .Net Framework 4.5 or higher (with Excel 2013 or Excel 2016).
- MS Visual Studio 2010 Tools for Office Runtime 4.0 (included along with the package).
- 4 GB Ram

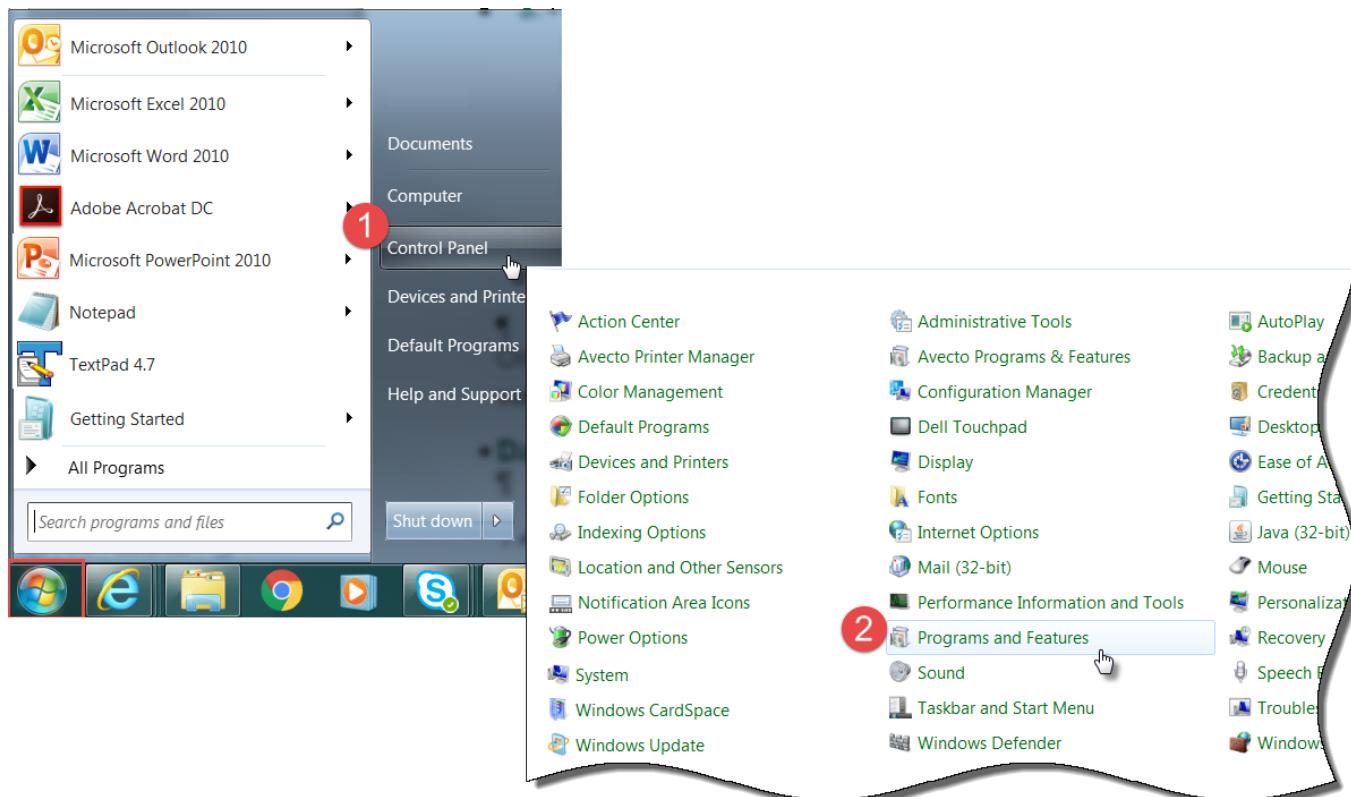
### 2. Local administrative rights

You will need to have local administrative rights to uninstall your current version of Data Direct and install Data Direct version 5.0. If you do not currently have admin rights please work with your IT team to either provide you with temporary rights or to perform the install for you.

### 3. Uninstall current version

Before installing this new version of Data Direct you will need to uninstall your current version. To do this:

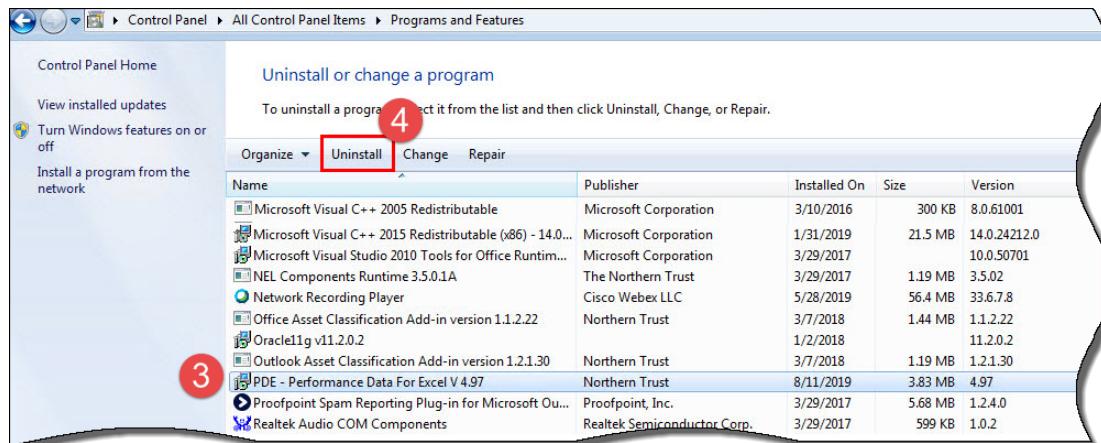
1. From your Start Button select **Control Panel**.
2. Select **Programs and Features**



3. Select PDE – Performance Data for Excel.

4. Click on **Uninstall**.

Once the uninstall is complete you are ready to install Data Direct 5.0.



## Data Direct Installation Instructions

1. At the bottom of the Passport page, select the Data Direct install link appropriate for your Operating System version (32 or 64bit).

The screenshot shows the Northern Trust Passport dashboard. At the bottom, there is a navigation bar with several links. Two specific links, "Data Direct 32bit" and "Data Direct 64bit", are highlighted with a red box and a red arrow pointing to them from the bottom left.

2. You will be asked to accept the Data Direct Software License and Support Agreement.

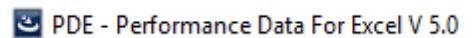
Click **Accept**.



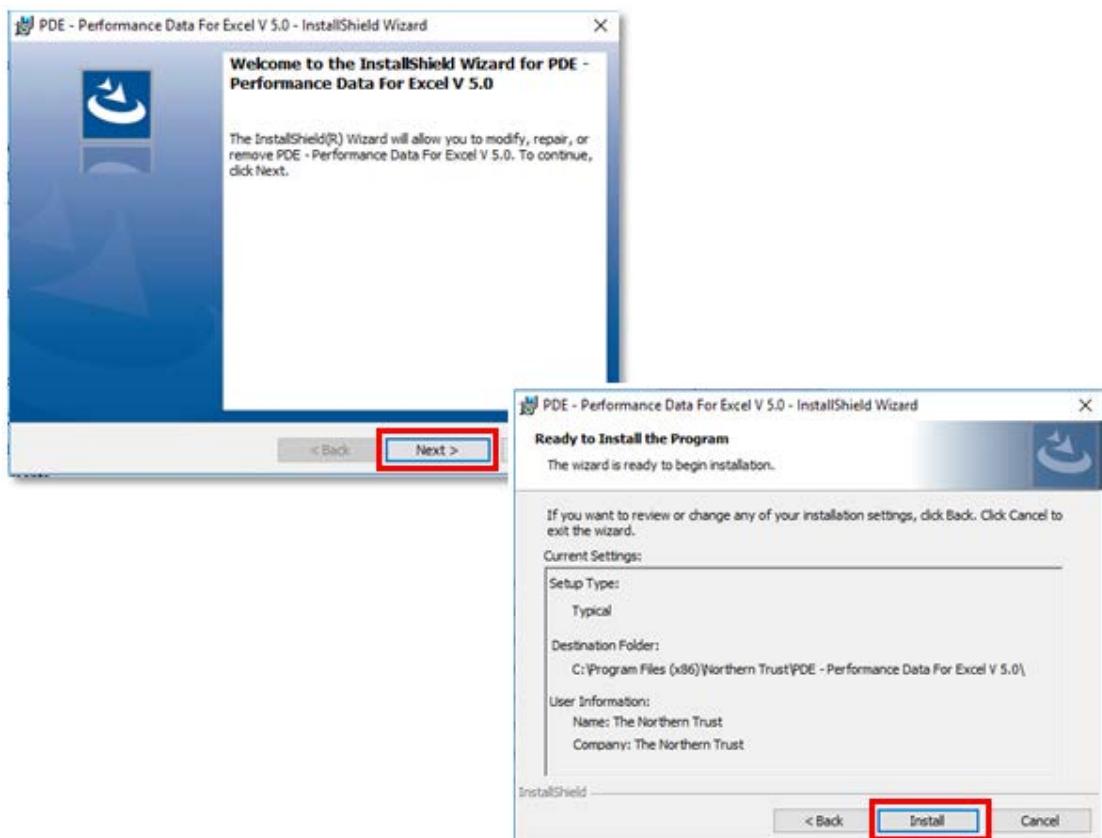
3. On the File download popup, click **Save** and browse to the folder where you want to save the zip file.



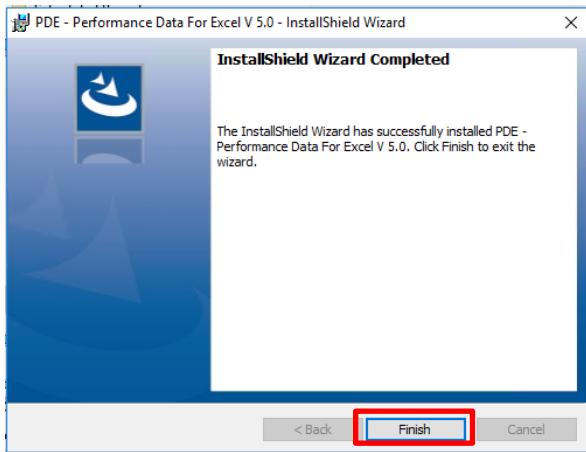
4. Once the zip file containing the new install has been downloaded, navigate to the file and double-click on the application file to begin the install.



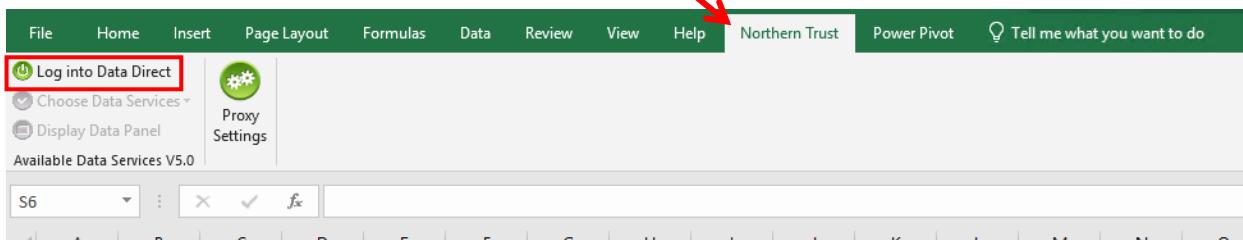
5. On the Install Wizard window click **Next**, then click **Install**.



6. Once the install is complete, click **Finish**.



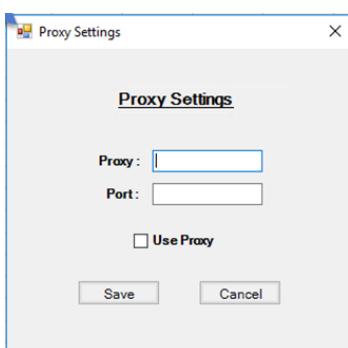
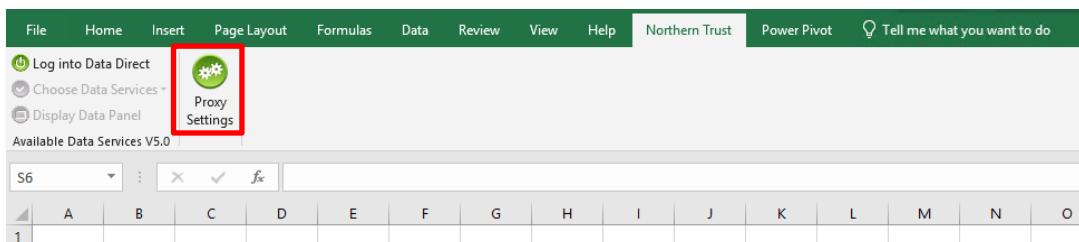
5. Confirm the install was successful by launching Excel and checking for the Northern Trust add-in at the top ribbon of your worksheet.



## Proxy Settings

**Please Note:** If your organization uses a proxy to access the internet, please follow the steps below to enter the Proxy/Port information provided by organization's IT department.

1. At the top of your page, click on **Proxy Settings**.
2. In the pop-up enter the proxy and the port information and select the "Use Proxy" option then click **Save**.



For questions or issues please contact your Northern Trust Representative.

© 2019 Northern Trust Corporation. Head Office: 50 South La Salle Street, Chicago, Illinois 60603 U.S.A. Incorporated with limited liability in the U.S. Products and services provided by subsidiaries of Northern Trust Corporation may vary in different markets and are offered in accordance with local regulation. This material is directed to professional clients only and is not intended for retail clients. For Asia-Pacific markets, it is directed to expert, institutional, professional and wholesale investors only and should not be relied upon by retail clients or investors. For legal and regulatory information about our offices and legal entities, visit [northerntrust.com/disclosures](http://northerntrust.com/disclosures). The following information is provided to comply with local disclosure requirements: The Northern Trust Company, London Branch. Northern Trust Global Investments Limited. Northern Trust Securities LLP. Northern Trust Global Services SE, 6 rue Lou Hemmer, L-1748 Senningerberg, Grand-Duché de Luxembourg RCS B232281; Northern Trust Global Services SE UK Branch, 50 Bank Street, London E14 5NT; Northern Trust Global Services SE Sweden Bankfilial, Ingmar Bergmans gata 4, 1st Floor, 114 34 Stockholm, Sweden; Northern Trust Global Services SE, Abu Dhabi Branch, registration Number 000000519 licenced by ADGM under FSRA # 160018. The Northern Trust Company of Saudi Arabia - a Saudi closed joint stock company - Capital SAR 52 million. Licensed by the Capital Market Authority - License No. 12163-26 - C.R: 1010366439. Northern Trust Luxembourg Management Company S.A., 6 rue Lou Hemmer, L-1748 Senningerberg, Grand-Duché de Luxembourg, Société anonyme RCS B99167. Northern Trust (Guernsey) Limited (2651)/Northern Trust Fiduciary Services (Guernsey) Limited (29806)/Northern Trust International Fund Administration Services (Guernsey) Limited (15532) Registered Office: Trafalgar Court Les Banques, St Peter Port, Guernsey GY1 3DA.