State of California

FI$Cal
Financial Information System for California

End-User Workstation Configuration Guide

Version 4.5

FINAL

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End-User Workstation Configuration Guide

Revision History

Date	Revision	Last Updated By	Change
2/4/2014	1.0	Derek Salzman	Document Creation.
4/14/2014	2.0	Tommy Trang	Update for Wave 1.
4/24/2014	3.0	Derek Salzman	Expanded scope to include full workstation configuration.
4/28/2014	3.2	Derek Salzman	Updated based on team review comments.
7/3/2014	3.3	Derek Salzman	Added new section 8 with content on Excel upload processes.
7/22/2014	3.4	Derek Salzman	Updated to include the new SmartView link for Hyperion reporting and revised GRC browser compatibility.
7/23/2014	3.5	Y Reyes	Updated to include steps if SmartView is already installed.
7/30/2014	3.6	M Haynes	Updated to make settings website specific where possible
12/9/14	3.7	Derek Salzman	Hyperion and PeopleSoft support for IE11.
1/14/15	3.8	Charlie Benson	Updated for Primavera P6 and Contract Management.
4/2/15	4.0	Peter Han Eunice Malley Richard Walker	- Consolidated the Production version and the non-Production version. - Added the instructions to enable Enterprise Mode on IE 11. - Added PeopleSoft Browser Configuration for IE11. - Modify the order of the sections for logical grouping. - Added the instructions to enable accessibility mode in PeopleSoft and Hyperion. - Removed the Windows 8 requirements as it requires further compatibility testing. - Added compatability for MS Word and Excel 2013. - Replaced the instructions on enabling macros in Excel with the official articles from Microsoft. - Technical writer review (4/17) - Added indentations for subsections. Updated Table of Contents for Sections 4 and 5 (4/23)
5/18/15	4.1	Richard Walker	- Revised Step 7 in Section 4.1.2 - Configuration for Hyperion Planning Users - Internet Explorer (All Versions)
5/28/15	4.2	Peter Han	- Revised URLs for SmartView - Changed “Smart View” to “SmartView” - Updated the Wave 1 reference to Wave 1 and Wave 2 in 3.2.2. Applications Covered

6/4/15	4.3	Derek Salzman	- Clarified section on accessibility software - Updated Hyperion Internet Explorer configuration by removing instruction to disable HTTPS requirement for trusted sites
7/20/15	4.4	Ed Remaley	- Clarified internet browser certification for Internet Explorer 11
8/19/15	4.5	Ed Remaley	- Additional documentation of Enterprise Mode

Table of Contents

1 Purpose 3

2 Network Connectivity 3

3 Hardware and Software Requirements 3

3.1 Operating Systems 3
3.2 Browser Compatibility 3
3.2.1 What is "Certification" for Browser Compatibility? 3
3.2.2 Applications Covered 4
3.2.3 Certified Browsers 4
3.3 Productivity Software 5
3.4 Accessibility Software 5
3.5 Hardware 6

4 Workstations Configuration Procedures 6

4.1 Browser Configuration 6
4.1.1 Configuration for PeopleSoft Financials Users 6
4.1.2 Configuration for Hyperion Planning Users 7
4.1.3 Configuration for Configuration for Governance, Risk, and Compliance GRC Users 14
4.1.4 Configuration Primavera P6 Users 15
4.1.5 Configuration Primavera PCM Users 16
4.2 Spreadsheet Uploads 16
4.3 Enabling Macros in Excel 16
4.4 Client Software Installation 17
4.4.1 SmartView Installation for Hyperion 17

5 Accessibility 17

5.1 PeopleSoft Accessibility Mode 18
5.2 Hyperion Accessibility Mode 20

Appendix A. Acronyms and Glossary 21

List of Tables

Table 1: FI$Cal Application URLs 3
Table 2: Certified Browsers 4
Table 3: Productivity Software 5
Table 4: Recommended Hardware 6
Table 5: Browser Configuration for PeopleSoft Users 6
Table 6: Browser Configuration for Hyperion Users 7

Table 7: Browser Configuration for GRC Users 14
Table 8: Browser Configuration for P6 Users 15
Table 9: Browser Configuration for PCM Users 16
Table 10: Macro Security Settings in Excel 16
Table 11: Enabling the Accessibility Mode in PeopleSoft 18
Table 12: Enabling the Accessibility Mode in Hyperion 20

1 Purpose

This document provides workstation specifications and configurations required for end-user access to the current production FI$Cal System (FI$Cal or the System). These requirements are categorized as follows: network connectivity, operating systems, browser compatibility, browser configuration, client software installation, productivity software, accessibility software, and hardware.

A glossary and list of acronyms contained in this document is included in Appendix A for reference.

2 Network Connectivity

Table 1 provides the list of FI$Cal application URLs that must be accessible to the user's workstation. These applications use the HTTPS protocol on standard port 443 and are Internet-enabled.

Table 1: FI$Cal Application URLs

Application	URL
Portal	https://portal.fiscal.ca.gov/psp/psppd1/?cmd=start
PeopleSoft Financials	https://financials.fiscal.ca.gov/psp/psfpd2/?cmd=start
Hyperion Planning	https://epm.fiscal.ca.gov/workspace/index.jsp

3 Hardware and Software Requirements

3.1 Operating Systems

FI$Cal supports Windows 7 operating systems for end-user workstations.Oracle certifies Windows 8 for use with FI$Cal applications. The FI$Cal Project (the Project) will provide full support on Windows 8 after all testing is completed in Wave 3. The Project will not be able to support issues specific to Windows 8 prior to Wave 3.

3.2 Browser Compatibility

3.2.1 What is "Certification" for Browser Compatibility?

Certification is a combination of Oracle software, browsers or sometimes other third-party products, and operating systems that Oracle has tested and should work together.

3.2.2 Applications Covered

This document contains the current browser certification for the FI$Cal Wave 2 System. The specific applications deployed in Wave 1 and Wave 2 are as follows:

- PeopleSoft Financials 9.1/PeopleTools 8.53
- PeopleSoft Portal 9.1/PeopleTools 8.53
- Hyperion 11.1.2.3
- Governance Risk and Compliance (GRC) 8.6.4
- User Productivity Kit (UPK) 11.1
- Primavera P6 (P6) Enterprise Project Portfolio Management (EPPM) 8.4
- Primavera Contract Management (PCM) 14.1
- FI$Cal Training Academy (FTA).

3.2.3 Certified Browsers

Certified browsers are for workstation (personal computer) and laptop only. FI$Cal was not designed to support mobile devices such as iPhone, Android, iPad, tablet, etc. Table 2 contains the list of Oracle-certified browsers for the FI$Cal Production System and indicates which browsers support which products associated with FI$Cal. Newer or older browser versions might perform acceptably for most System functions, but are a “use-at-your-own-risk” proposition. This is because Oracle will not support any related issues and the FI$Cal Service Center does not have control over this aspect of the Commercial-Off-The-Shelf software.

Note: Internet Explorer (IE) is the recommended browser.

Table 2: Certified Browsers

Product	Internet Explorer				Firefox		
	IE 11	IE10	IE9	IE8	31	24	17
PeopleSoft	X	X	X	X			X
Hyperion	X*	X	X	X		X	X
GRC				X			X
UPK	X	X	X	X			X
FTA	X	X	X	X			
Primavera P6	X	X	X		X**		
Primavera PCM	X		X	X		X***	

* IE 11 will be supported by Oracle for use with Hyperion, but is not certified. IE 11 must be used in Enterprise Mode for Hyperion compatibility. See section 4.1.2 for more on enabling Enterprise Mode

** Firefox 31.0 Extended Support Release (ESR)

*** Firefox 24.6.0 and 24.7.0 ESR

3.3 Productivity Software

The System uses common applications to support reporting, attachment, and notification functionality:

- Reporting – Report formats use one or more common desktop productivity applications including Microsoft Word, Microsoft Excel, and Adobe Adobe Portable Document Format (PDF)
- Attachments – Where applicable, attachment functionality allow users to upload and download reference documents in common formats such as Word, Excel, and PDF.
- Notifications – System-generated workflow notifications will be sent to appropriate users based on their assigned FI$Cal end-user role(s).

Table 3: Productivity Software

Application	Use
Microsoft Word (2007, 2010, 2013)	Viewing reports or attachments formatted in Microsoft Word.
Microsoft Excel (2007, 2010, 2013)	Viewing reports or attachments formatted in Microsoft Excel.
Adobe Reader (9.5 or higher)	Viewing reports or attachments formatted in Adobe PDF.
Notepad (or comparable text editor**)**	Viewing reports or attachments formatted in plain text (e.g. comma-delimited, flat files).
Email Client (State of California account required - does not need to be provided by OTech)	Communicating. For example, used in workflow processing.

3.4 Accessibility Software

Oracle does not certify its products to run with specific assistive technologies or specific versions of assistive software. Oracle uses development standards to produce applications that will interoperate with assistive technologies and FI$Cal follows these

standards for custom-developed system components. FI$Cal uses market-leading assistive technologies to perform accessibility testing.

3.5 Hardware

Minimum hardware requirements vary by the selection of compatible operating system, browser, and applications as specified by the products' vendors. The Project recommends the hardware specifications shown in Table 4 for end-user workstations.

Table 4: Recommended Hardware

Feature	Description
Random Access Memory (RAM)	4 GB RAM minimum
Central Processing Unit (CPU)	1.7+ GHz CPU minimum, multi-core CPU recommended
Monitor	Display of 1024x768 resolution or higher and High Color (16 bit) mode for the best display results (800 x 600 minimum)
Mouse	Standard
Keyboard	Standard
Printer	Laser
Scanner	Access to an office scanner capable of scanning paper documents into Adobe PDF format

4 Workstations Configuration Procedures

4.1 Browser Configuration

This section provides configuration changes required to use FI$Cal.

4.1.1 Configuration for PeopleSoft Financials Users

The configuration for PeopleSoft Financials users is shown in Table 5:

Table 5: Browser Configuration for PeopleSoft Users

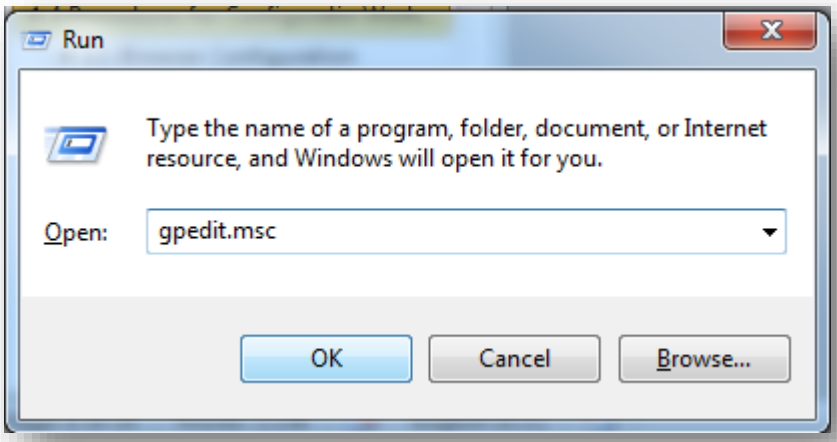
Browser	Configuration

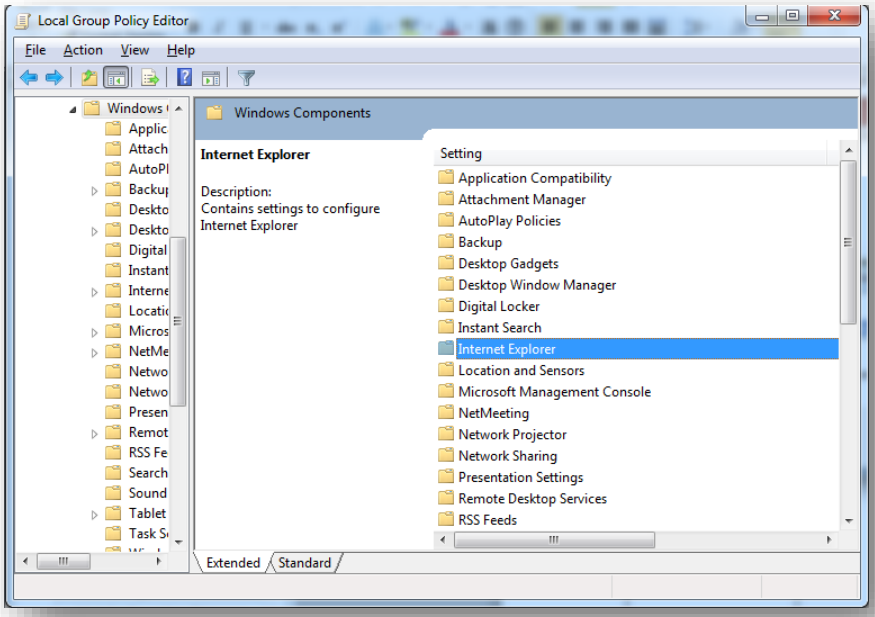
Internet Explorer 11	Internet Explorer 11 is certified in standard mode with PeopleTools 8.53.11 and higher. Running in compatibility mode is not required.
Internet Explorer 10	Enable Compatibility or Quirks mode, the default configuration. Standards mode is not supported. If the Compatibility or Quirks mode is disabled, PeopleSoft applications will run in Standards mode, which drastically affects how the Ajax partial page refresh operates and might make the pages unusable.
Internet Explorer 8 and 9	Enable Standards mode, the default configuration. Compatibility View is not supported.
Firefox 17	Use the default configuration.

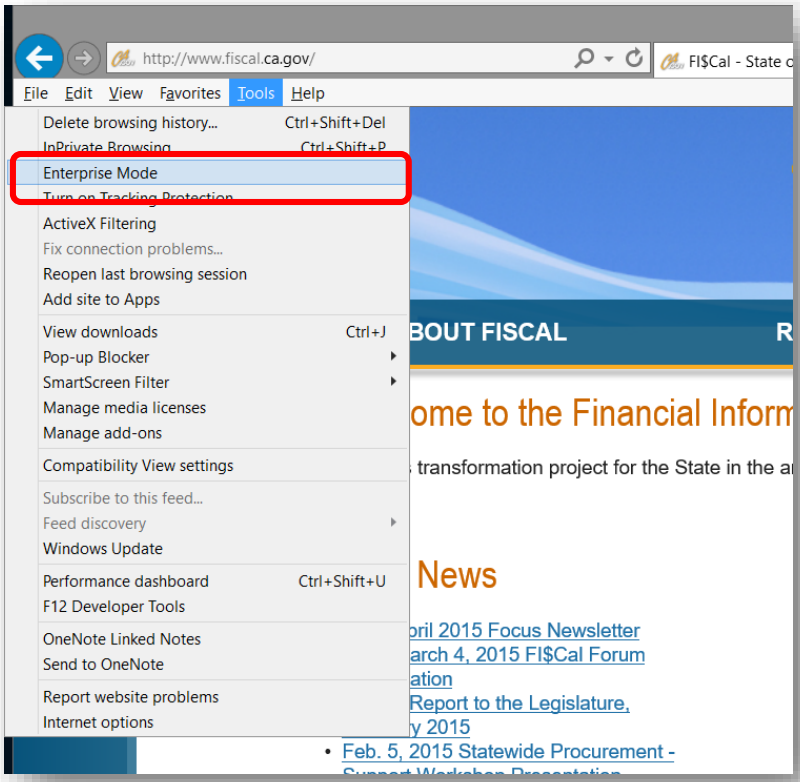
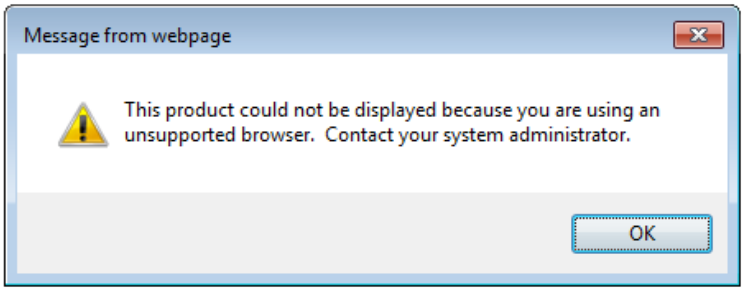
4.1.2 Configuration for Hyperion Planning Users

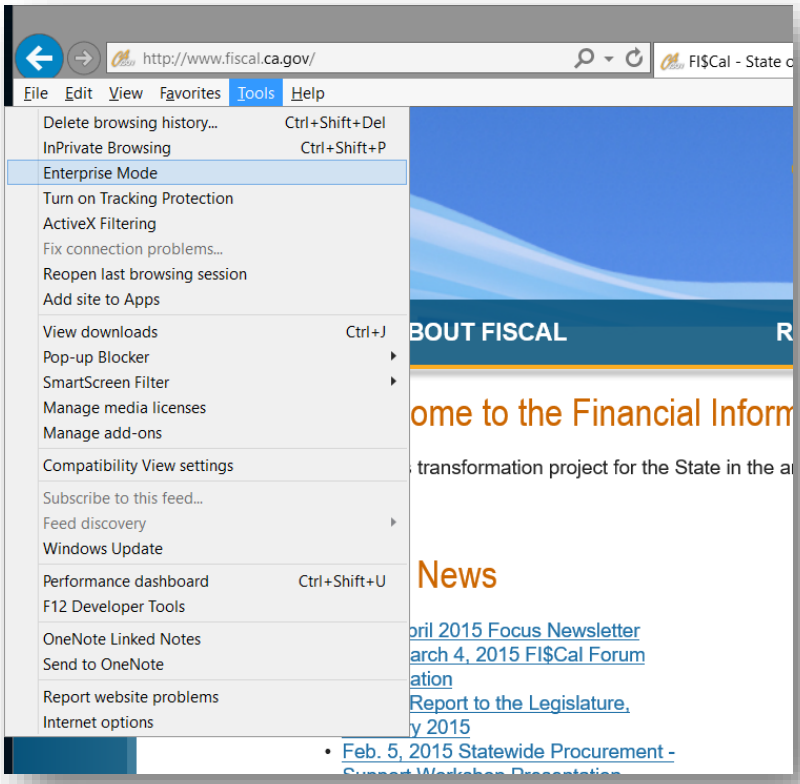
The configuration for Hyperion planning users is shown in Table 6:

Table 6: Browser Configuration for Hyperion Users

Browser	Configuration
Internet Explorer 11	1. Enable Enterprise Mode for https://epm.fiscal.ca.gov. a. Press Windows Key + R to launch the "Run" dialog. b. As shown below, enter gpedit.msc into the Run dialog and press Enter.  c. In the Local Group Policy Editor, navigate to User Configuration > Administrative Templates > Windows Components > Internet Explorer.

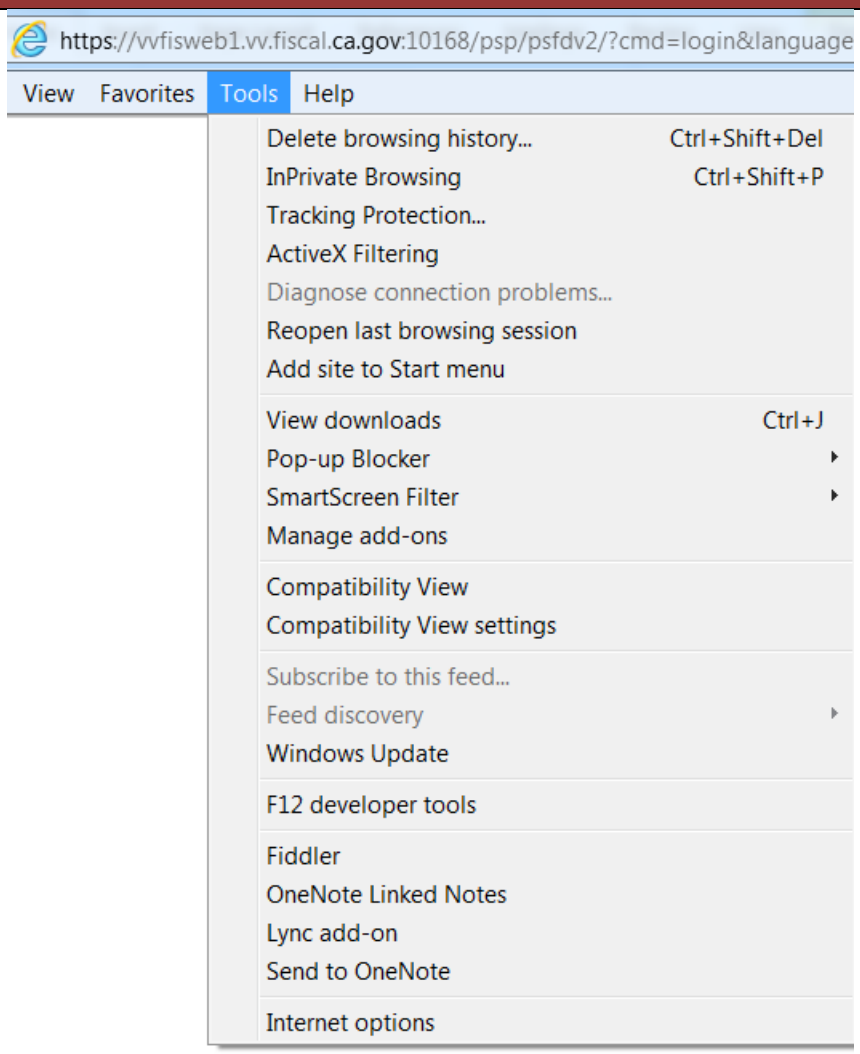
Browser	Configuration
	 d. Find "Let users turn on and use Enterprise Mode from the Tools menu option" and double-click the option. e. In the dialog window, click on “Enabled allowing users to enable Enterprise Mode manually.” *Admins can also use the website list option to automatically enable the Enterprise Mode for certain websites.* f. Click “OK.” Close all open Internet Explorer windows. g. Open a new Internet Explorer window. h. Navigate to Tools > Enterprise Mode and select “Enterprise Mode” to enable.

Browser	Configuration
	 i. If the user is utilizing the Hyperion link found at http://www.fiscal.ca.gov, the default behavior is for a new session to be opened in a new window, in which case Enterprise Mode will be disabled. If this happens, the user may experience the following error message: 

Browser	Configuration
	If this happens, the user can re-enable Enterprise mode by going to Tools > Enterprise Mode again. 
Internet Explorer (All versions)	1. Enable “Check for new version every time user visits page”: a. Click Tools > Internet Options > General Tab > Browsing History Section > Settings. b. Check the option “Every time I visit the webpage.” c. Click “OK.” 2. Enable pop-ups from Hyperion: a. Click Tools > Internet Options > Privacy Tab b. Click “Settings.” c. Enter “*.fiscal.ca.gov” in the “Address of website to allow:” box and click “Add.” d. Click “Close.” 3. Add Workspace URL to trusted sites:

Browser	Configuration
	a. Click Tools > Internet Options > Security Tab. b. Select “Trusted Sites” > Click “Sites” button. c. Under “Add this website to the zone,” enter the Workspace URL (https://epm.fiscal.ca.gov:). d. Click “Add” > Click “Close” > Click “Apply” > Click “OK.” 4. Minimize security setting for trusted sites: a. Click Tools > Internet Options > Security Tab. b. Select “Trusted Sites” > Select “Custom Level.” c. From “Reset To” list, select “Low” (“Medium” can also be selected, but as an added step, users will be prompted to continue when they use the system). d. Click “OK”. 5. Customize Security Settings for Trusted Sites: a. Click Tools > Internet Options > Security Tab b. Select “Trusted sites.” c. Click “Custom level….” d. Scroll down to the “Miscellaneous” section. e. Select “Access data sources across domains” > Enable. f. Select “Allow script-initiated windows without size or position constraints” >Enable. g. Select “Run ActiveX controls and plug-ins” > Enable. h. Select “Script ActiveX controls marked safe for scripting” > Enable. i. Click “OK”. 6. Allow session cookies for specific sites: a. Click Tools > Internet Options > Privacy Tab. b. Click “Sites.” c. Enter “ca.gov” in “Address of website” box. d. Click “OK.”

Browser	Configuration
	7. Allow encrypted pages to be saved to disk: a. Click Tools > Internet Options -> Advanced Tab. b. Security Section > Uncheck “Do not save Encrypted Pages to Disk.” c. Click “OK.” 8. Enable Native XMLHTTP: a. Click Tools > Internet Options > Advanced Tab. b. Select Security Section > Check “Enable Native XMLHTTP". c. Click “OK.” 9. Compatibility View Option a. Click Tools > Compatibility View Settings b. Make sure “EPM Workspace URL” is **not** in the Compatibility view list. If “Compatibility View” is checked, remove the URL from the compatibility view list. c. Uncheck all available options at the bottom of the list. d. Click Close.
Internet Explorer 8 and 9	Enable Standards mode, the default configuration. Compatibility View is not supported. To verify Internet Explorer is in Standards mode, click on the “Tools” menu and confirm that “Compatibility View” is **not** checked as shown in the screenshot below:

Browser	Configuration
	 If “Compatibility View” is checked, remove the URL from the compatibility view list.
FireFox 17 and 24	1. Install Extensible Markup User Interface Language (XUL) Add-on: a. Click on the Firefox menu on the upper left-hand corner and select “Add-ons.” b. Search for “Remote XUL Manager” and install. c. Once installed, select Options for the Remote XUL Manager Add-on and https://epm.fiscal.ca.gov. 2. Enable Pop-ups a. Click Options->Content b. Click “Exceptions”

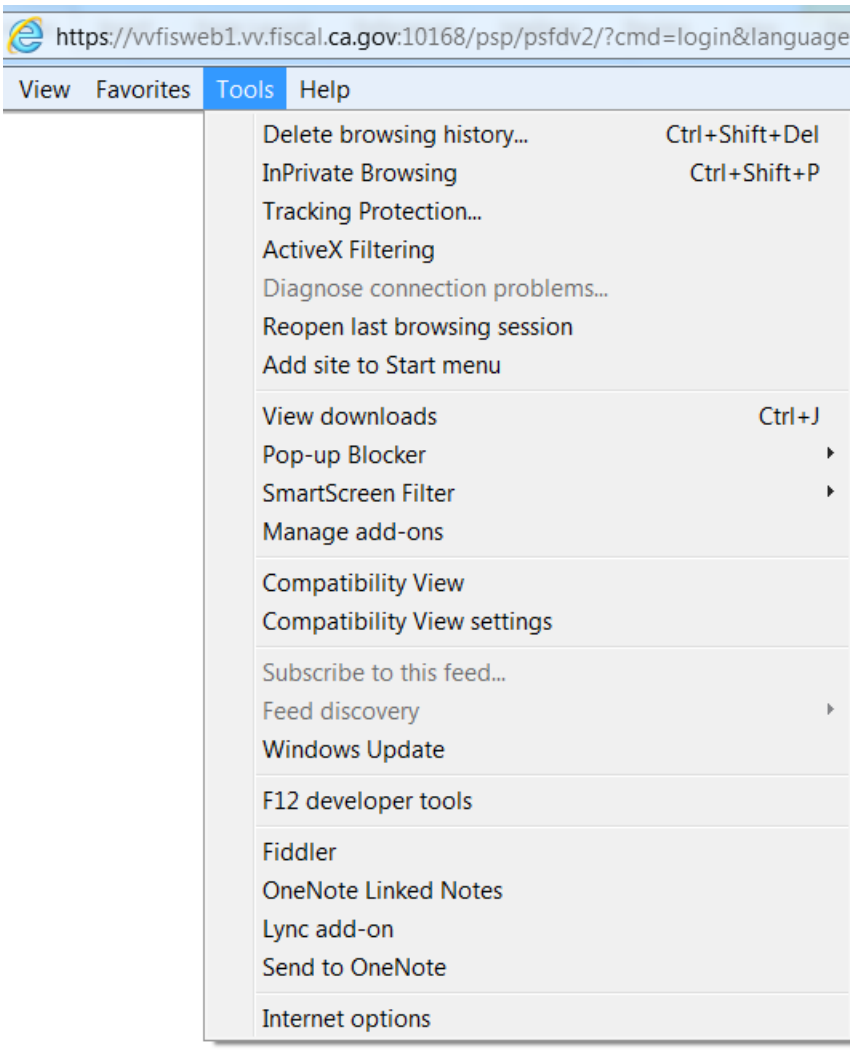
Browser	Configuration
	c. Enter “fiscal.ca.gov” in the “Address of website:” box. d. Click “Allow.” e. Click “Close.” f. Click “OK.”
Registry Modification	1. Click Start > Run > Regedt32 > Enter. 2. Navigate to the following location: My Computer\HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet Settings. 3. Right Click on “Internet Settings” -> New -> DWORD Value 32-bit. 4. Name it “ReceiveTimeout.” 5. Right Click on “ReceiveTimeout” -> Select “Modify.” 6. Check “Decimal” --> In “Value Data” section and enter “480000.” 7. Click “OK.” 8. Repeat the above process for each of remaining 2 DWORD Values listed below: a. KeepAliveTimeout = 180000 b. ServerInfoTimeout = 180000 9. Close Registry -> Reboot PC.

4.1.3 Configuration for Configuration for Governance, Risk, and Compliance GRC Users

The configuration for GRC users is shown in Table 7.

Table 7: Browser Configuration for GRC Users

Browser	Configuration
Internet Explorer 8	Enable Standards mode, the default configuration. Compatibility View is not supported. To verify Internet Explorer is in standards mode, click on the “Tools” menu and confirm that “Compatibility View” is **not** checked as shown in the screenshot below:

Browser	Configuration
	If “Compatibility View” is checked, remove the URL from the compatibility view list. 

4.1.4 Configuration Primavera P6 Users

The Configuration for Primavera P6 users is shown in Table 8.

Table 8: Browser Configuration for P6 Users

Browser	Configuration
All	P6 requires a minimum Sun Java Runtime Environment (JRE) 1.7.0_67 or 1.8.0_20 on the workstation. Users may be prompted to updated their JRE plug-in on first use.

Browser	Configuration
All	Windows 7 SP1, 32-bit or 64-bit, are tested and supported by the vendor. Other workstation operating systems might work, but cannot be supported.

4.1.5 Configuration Primavera PCM Users

Table 9: Browser Configuration for PCM Users

Browser	Configuration
All	PCM requires Sun Java Runtime Environment (JRE) 1.7.0_65 or 1.7.0_67 on the workstation. Users may be prompted to updated their JRE plug-in on first use.
Internet Explorer 11.x	Windows 7 SP1+, 32-bit or 64-bit, are tested and supported by the vendor.

4.2 Spreadsheet Uploads

A subset of PeopleSoft users will have the ability to upload data to FI$Cal using Excel templates. Macros are required to be enabled per the attached document. Job aids for each specific upload process will be posted to the FI$Cal website here: http://www.fiscal.ca.gov/access-fiscal/FISCalJobAidsandTrainingTips.html

4.3 Enabling Macros in Excel

Follow the instructions provided in the links below. Choose the “disable all macros with notification” option so that macros can be enabled on a file by file basis. Once the change is made, the entire Excel application must be restarted for enabled macros to take effect.

Table 10: Macro Security Settings in Excel

Excel Version	Link
Excel 2010 & 2013	http://office.microsoft.com/en-us/excel-help/change-macro-security-settings-in-excel-HP010342232.aspx
Excel 2007	http://office.microsoft.com/en-us/excel-help/change-macro-security-settings-in-excel-HP010096919.aspx

4.4 Client Software Installation

4.4.1 SmartView Installation for Hyperion

Some Hyperion users will have access to the SmartView reporting tool. SmartView is an add-on to Microsoft Word and must be installed after FI$Cal has been deployed to the user.

If not already installed on the workstation, do the following to install SmartView:

1. Log on to the computer with local administrator privlages.
2. Login to https://epm.fiscal.ca.gov/workspace/index.jsp.
3. Go to Tool > Install > SmartView.
4. Click on “Run” in the pop-up window to install SmartView.
5. Enter C:\Oracle\SmartView as destination folder.
6. Click “OK” on the pop-up window that says installation is successful.
7. Open MS Excel. A new menu called “SmartView” will appear in the top menu.
8. Click “SmartView.”
9. Click “Options.”
10. In the shared connection URL field, enter https://SmartView.fiscal.ca.gov/workspace/SmartViewProviders.
11. Click “OK” to save.

Note: If SmartView was already installed previously, do the following to update the connection URL.

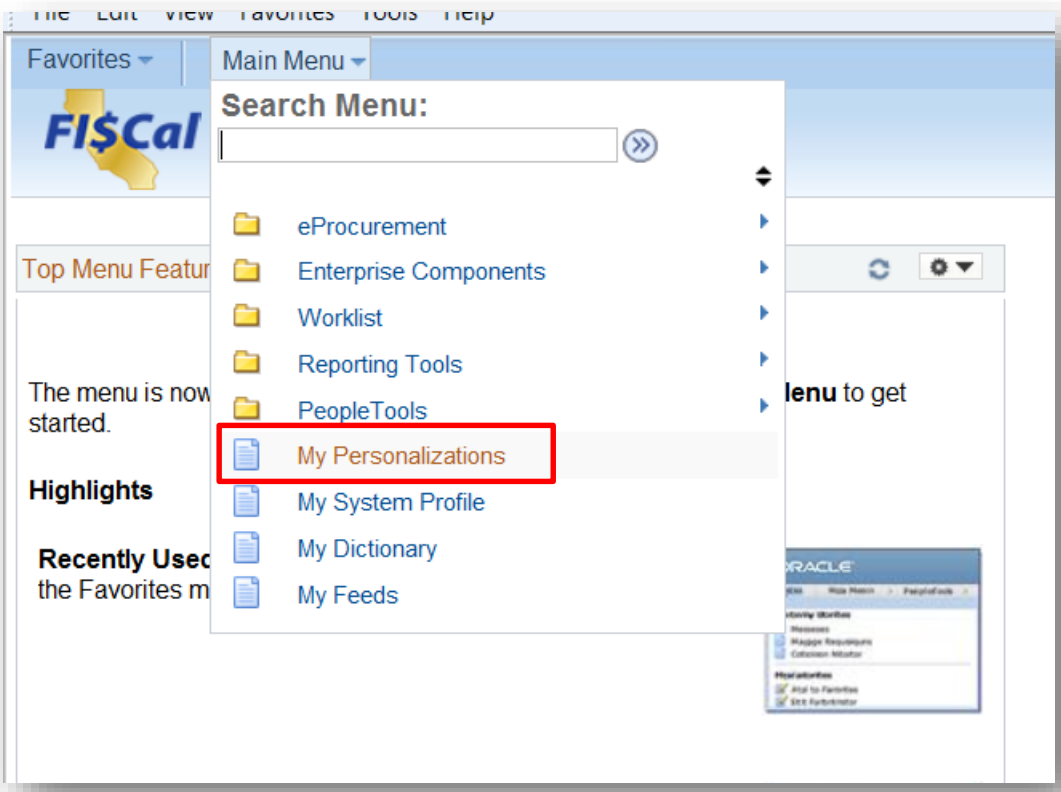
1. Open MS Excel, click on “SmartView” in the top menu.
2. Click on “Options”.
3. In the Shared Connection URL field, enter https://SmartView.fiscal.ca.gov/workspace/SmartViewProviders.
4. Click “OK” to save.

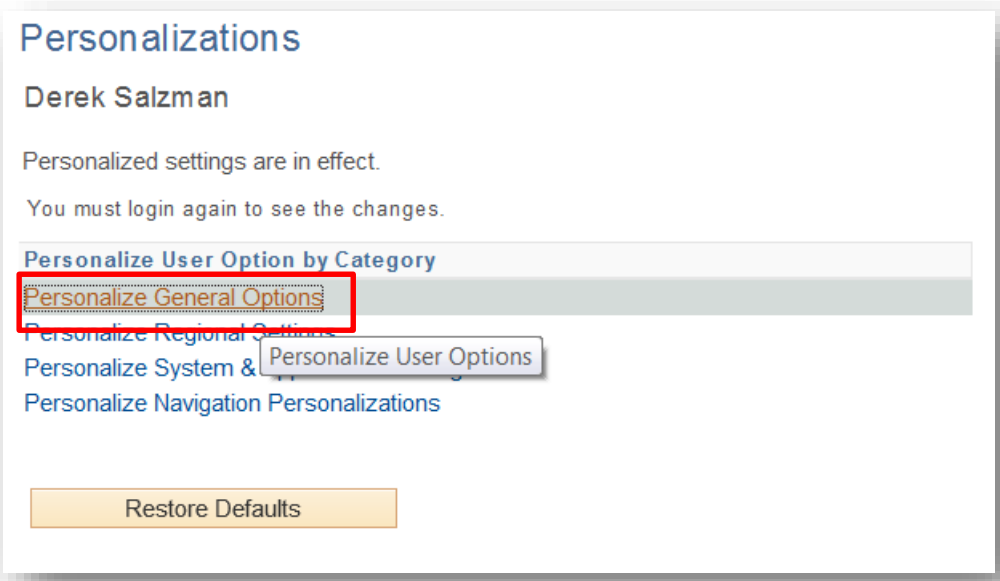
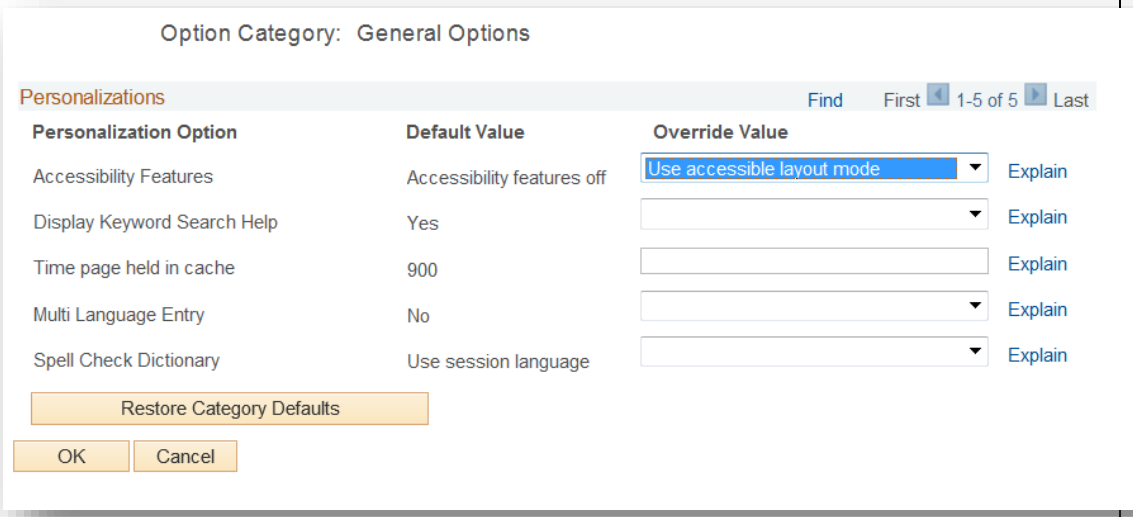
5 Accessibility

When using FI$Cal with a screen reader, a user must enable the accessibility mode in their user preferences as described in Table 11 below.

5.1 PeopleSoft Accessibility Mode

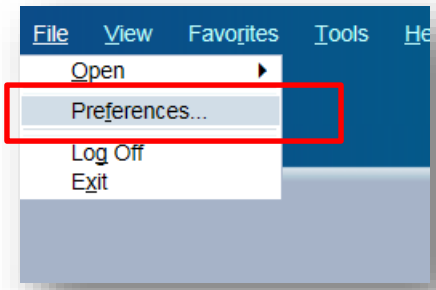
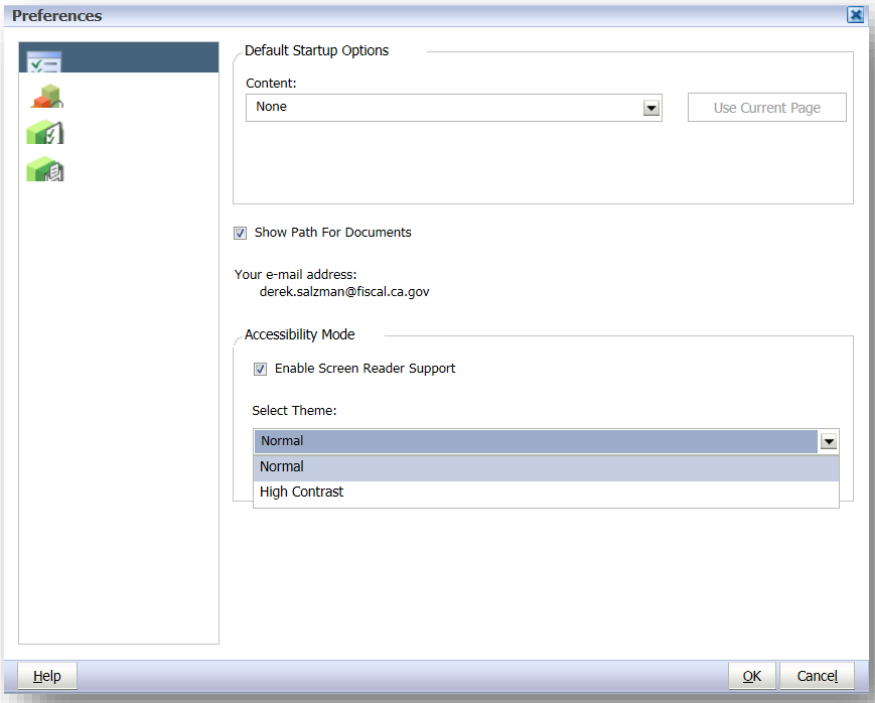
Table 11: Enabling the Accessibility Mode in PeopleSoft

Step	Action
1	Log on to PeopleSoft with the specific user ID that requires the accessibility mode.
2	From the PeopleSoft Home Screen, select Main Menu and “My Personalizations”. 
3	Select “Personalize General Options”.

Step	Action
	
4	Select “Use accessible layout mode” under Accessibility Features and click “OK.” 

5.2 Hyperion Accessibility Mode

Table 12: Enabling the Accessibility Mode in Hyperion

Step	Action
1	Log on to Hyperion as the user that requires Accessibility Mode.
2	Select “File”, and “Preferences”. 
3	Check “Enable Screen Reader Support” and “High Contrast” theme. Click “OK.”
4	Select “Use accessible layout mode” under Accessibility Features and click “OK.” 

Appendix A. Acronyms and Glossary

The following terms and acronyms are used in this document:

Acronym/Term	Definition
CPU	Central Processing Unit
DWORD	Double word. A numerical value of twice the size of a word, typically 32 bits.
EPPM	Enterprise Project Portfolio Management
ESR	Extended Support Release
FTA	FI$Cal Training Academy
GRC	Governance Risk and Compliance
HKEY	Handle to Registry Key
HTTPS	HyperText Transfer Protocol over SSL
IE	Internet Explorer
JAWS	Job Acess With Speech. A screen reader developed for computer users whose vision loss prevents them from seeing screen content or navigating with a mouse. It provides speech and Braille output for several computer applications.
JRE	Java Runtime Environment
OTech	Office of Technology Services
PCM	Primavera Contract Management
PDF	Portable Document Format
RAM	Random Access Memory
SSL	Secure Socket Layer
UPK	User Productivity Kit
URL	Uniform Resource Locator
Workflow notification	An email notice to a specific user or users informing them that an action is reuiqred within the System, for example, an approval.
XML	Extensible Markup Language
XUL	Extensible Markup User Interface Language