State of California

End-User Workstation Configuration Guide – For July 2016 Release

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FINAL

July 2016

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. Later removed - 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)

Date	Revision	Last Updated By	Change
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. Later removed.
12/9/15	4.6	Bryan Sohayda	- DRAFT updates for Release 2016 - Removed detail for GRC and Primavera, will generate separate Appednix documents for SCO/DGS respectively. Reduces confusion for incoming Depts if they need to use GRC/Primavera repectively. - Removed application versions as it doesn’t impact the requirement - Revised list of Certified Browsers per Oracle - Revised Office versions to remove version 2007 - Table 5 – Remove Internet Explorer 8 reference - 4.1.2 Hyperion Planning: removed reference to Enterprise Mode and Internet Explorer 8. Modified Firefox details
1/13/16	4.6.1	Bryan Sohayda	- Updates for 2016 Release
1/14/16	4.6.1	Eunice Malley	- Added heading for Section 6, Departmental Configuration, and Section 6.1 regarding FTA whitelists
1/15/16	4.7	Eunice Malley	- Tech edit of changes made since last publication
2/2/16 2/11/16 2/29/16 3/9/16	5.0	Valerie Stanfield Eunice Malley	- Clean up edits. Modified whitelist wording.
7/6/16	5.1	Rabah Khemis Eunice Malley	- SmartView and Hyperion updates
7/22/16	5.2	Eunice Malley	- Browser and settings updates.
8/1/16	5.3	Peter Lee Eunice Malley	- Browser Configuration changes - Internet Explorer (All versions) - Changes to Oracle SmartView Installation for Hyperion

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1 Purpose

This document provides workstation specifications and configurations required for departmental 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

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 provides full support on Windows 8 as of August 1, 2016. (The Project was not be able to support issues specific to Windows 8 prior to the July 2016 Release.)

Browser Compatibility

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.

Applications Covered

This document contains the current browser certification for the FI$Cal System.

- PeopleSoft Financials
- PeopleSoft Portal
- Hyperion
- Identity and Access Management (password changes)
- FI$Cal Training Academy (FTA)

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				
	EDGE	**IE 11**	IE10	IE9	IE8	45+*	31**	30**	24**	17**
PeopleSoft	X	X	X	X				X	X	
Hyperion (Version 11.2.4)		X	X	X		X	X			
FTA		X	X	X	X					
Identity Access Management (IAM)		X	X	X	X		X		X	X

* For the best user experience, it is recommended that you use Firefox 47 with Microsoft Windows 7.

** Firefox 31.0, 30.0 and 24.7.0 Extended Support Release (ESR)

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 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 by email to appropriate users based on their assigned FI$Cal end-user role(s).

Table 3: Productivity Software

Application	Use
Microsoft Word (2010, 2013)	Viewing reports or attachments formatted in Microsoft Word.
Microsoft Excel (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.

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. The Project follows these standards for custom-developed system components. The Project uses market-leading assistive technologies to perform accessibility testing.

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

Feature	Description
Central Processing Unit (CPU)	1.7+ GHz CPU minimum, multicore 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

Browser Configuration

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

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	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. standardmode is not supported. If the Compatibility or Quirks mode is disabled, PeopleSoft applications will run in standard mode, which drastically affects how the Ajax partial page refresh operates and might make the pages unusable.
Internet Explorer 9	Enable standard mode, the default configuration. Compatibility View is not supported.
Firefox 30	Use the default configuration.

Configuration for Hyperion Planning Users

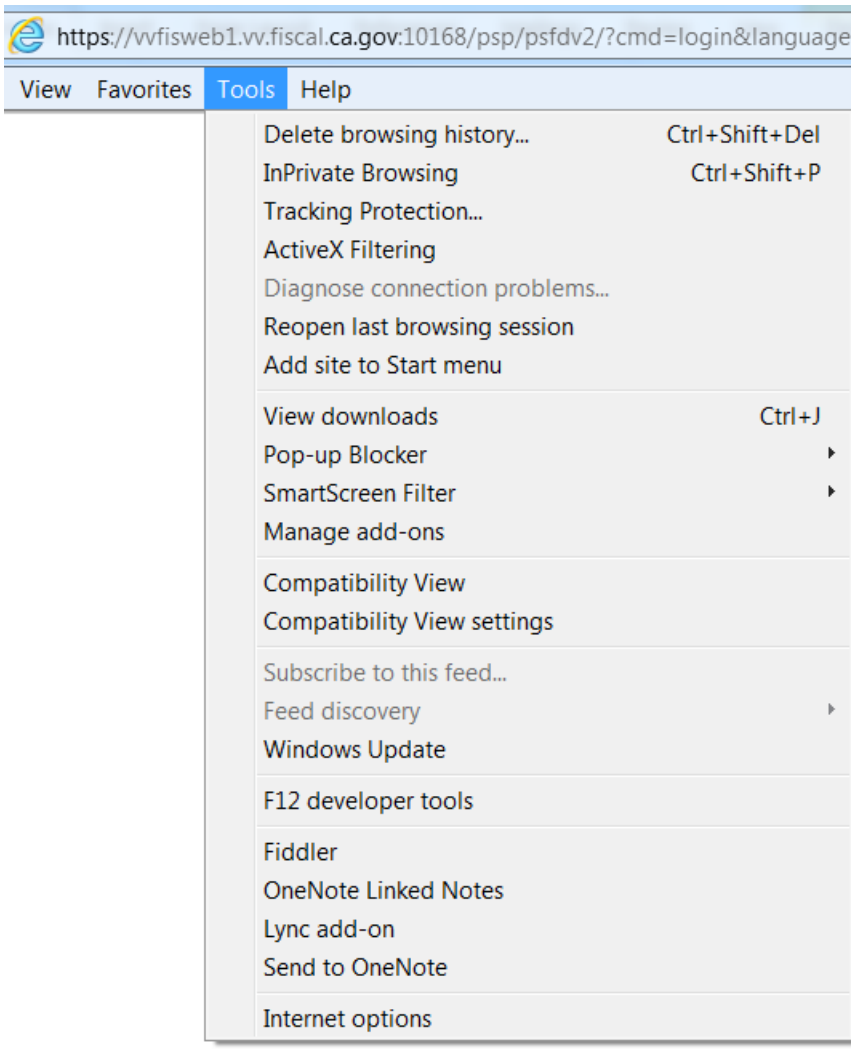
The configuration for Hyperion planning users is shown in Table 6.

Table 6: Browser Configuration for Hyperion Users

Browser	Configuration
Internet Explorer 11	Follow the steps outlined for Internet Explorer (All versions) below.
Internet Explorer (All versions)	1. Current Hyperion users are to disable Enterprise Mode by unchecking the Enterprise Mode option. New users are to skip to Step 4. a. Open IE browser. b. Select Tools from menu bar: 2. Enterprise Mode will show as checked. Click on Enterprise Mode to disable it. 3. Close the browser and clear cache. 4. 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.” 5. 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.”

Browser	Configuration
	d. Click “Close.” e. Uncheck “Turn on Pop-up Blocker.” f. Click “Apply.” g. Click “OK.” 6. Add Workspace URL to trusted sites: 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.” e. Uncheck "Require server verification (https:) for all sites in this zone" f. Click “Close” > Click “OK.” 7. 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. i. Select “Access data sources across domains” > Enable. ii. Select “Allow script-initiated windows without size or position constraints” >Enable. e. Select “Run ActiveX controls and plug-ins” > Enable. f. Select “Script ActiveX controls marked safe for scripting” > Enable. g. Click “OK”. 8. Minimize security setting for trusted sites: a. Click Tools > Internet Options > Security Tab. b. Select “Trusted Sites” > Select “Custom Level.”

Browser	Configuration
	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 “Reset.” e. Click “OK”. 9. 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 Allow. e. Click “OK.” f. Click Advanced. Check the "Override automatic cookie handling", accept the first and third party cookies and check the "Always allow session cookies" option. g. Click “OK.” 10. 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.” 11. Enable Native XMLHTTP: a. Click Tools > Internet Options > Advanced Tab. b. Select Security Section > Check “Enable Native XMLHTTP Support". c. Click “OK.” 12. 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.

Browser	Configuration
	c. Uncheck all available options at the bottom of the list. d. Click Close.
Internet Explorer 9	Enable Standards mode, the default configuration. Compatibility View is not supported. To verify Internet Explorer is in standard 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 31 ESR	1. Enable Pop-ups a. Click Options->Content. b. Click “Exceptions.” 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.

Spreadsheet Uploads

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

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 7: 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

Client Software Installation

Oracle SmartView Installation for Hyperion

SmartView for Office is a comprehensive tool for accessing and integrating Enterprise Project Management (EPM) and Business Intellligence (BI) content from Microsoft Office products. It provides a common Microsoft Office interface designed specifically for EPM and BI. Using SmartView, users can view, import, manipulate, distribute, and share data in Microsoft Excel, Word and PowerPoint interfaces.

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

1. Log on to the computer with local administrator privileges.
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:
    a. Enter the SmartView URL as https://epm.fiscal.ca.gov/workspace/SmartViewProviders.
11. Click "OK" to save.

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

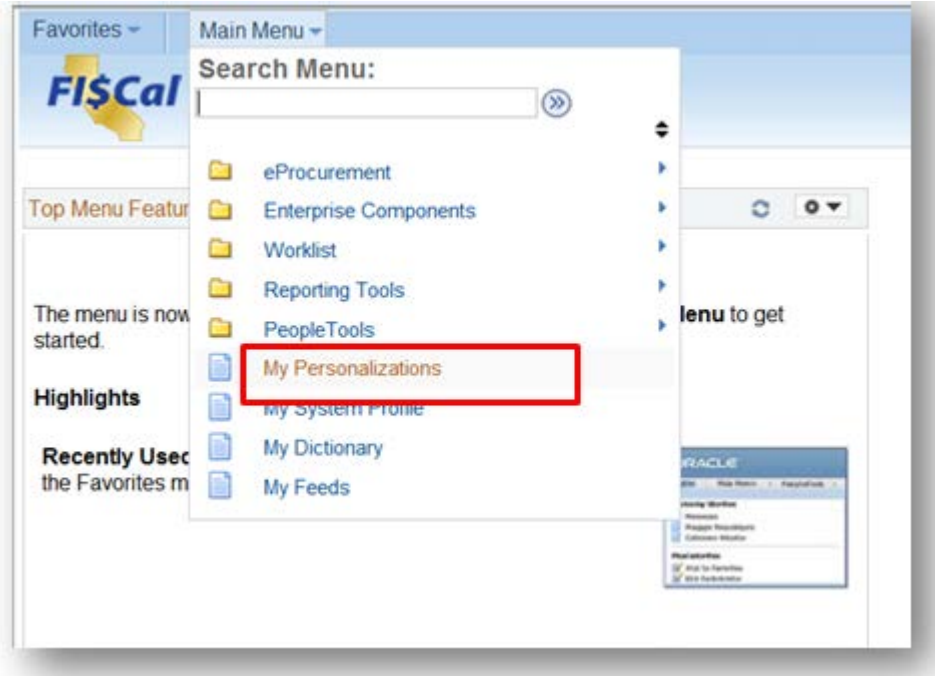
1. Log on to the computer with local administrator privileges to uninstall the older version.
2. Follow previous steps on new installation ("If **not already installed** on the workstation, do the following to install SmartView").

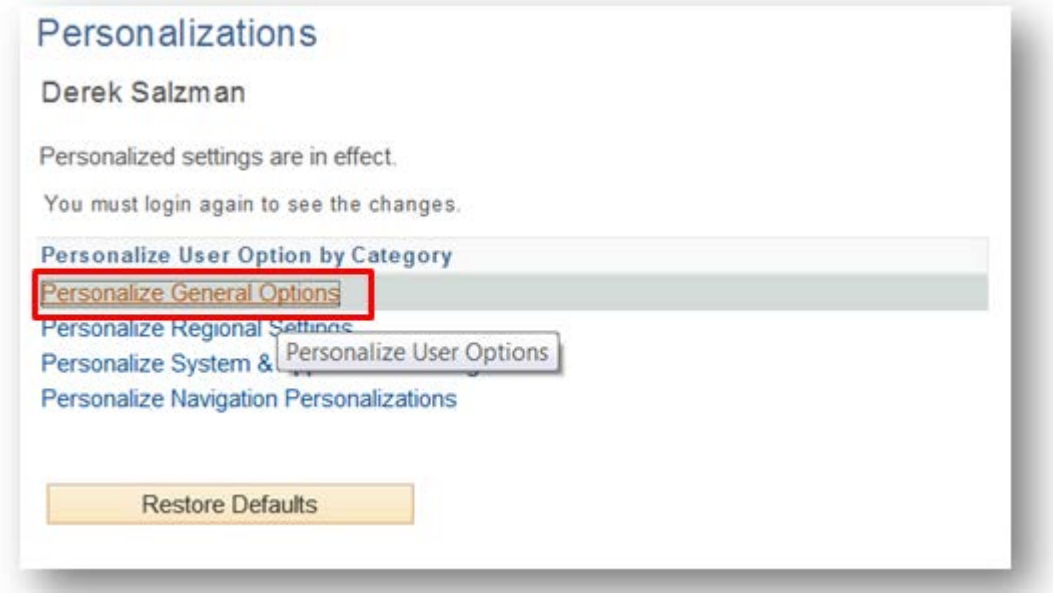
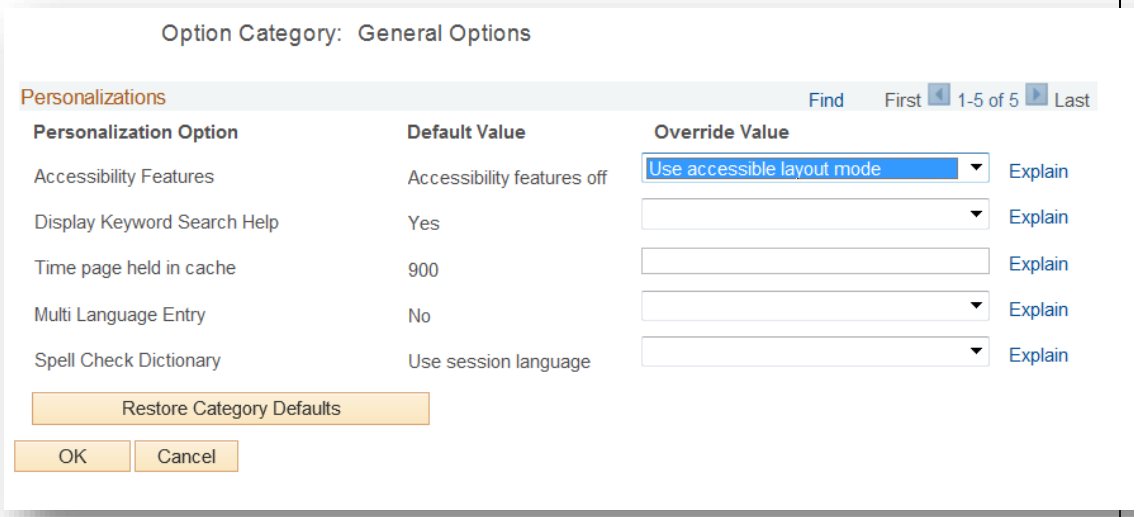
5 Accessibility

When using FI$Cal with a screen reader, a user must enable the accessibility mode in their user preferences as described in Table 8 below.

PeopleSoft Accessibility Mode

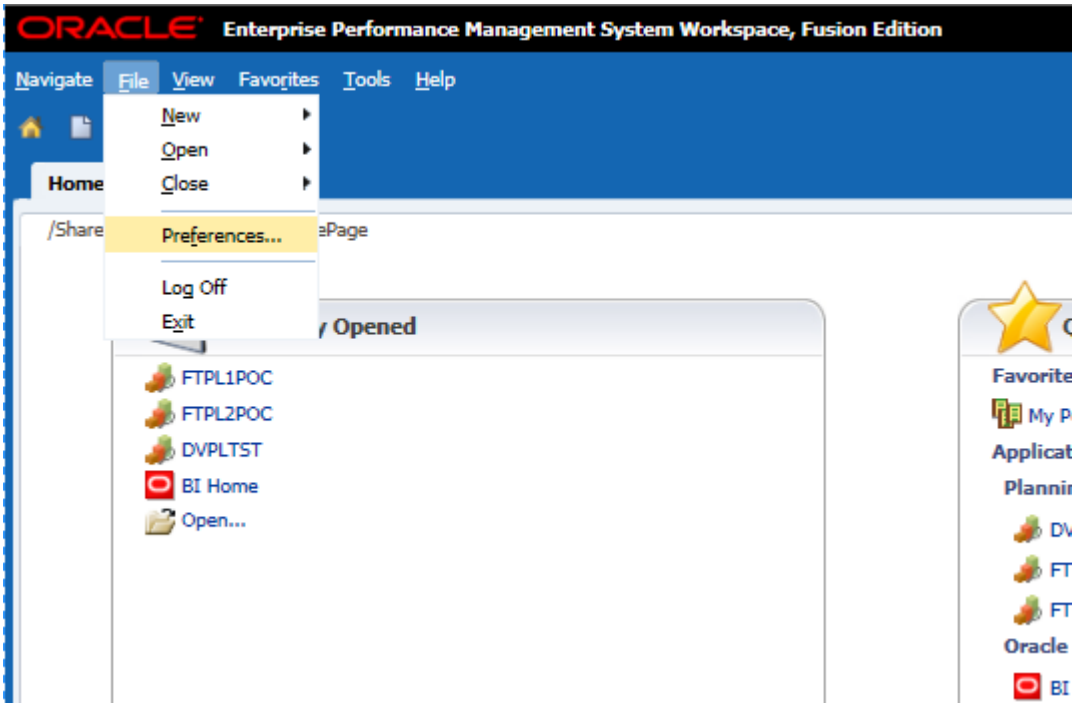
Table 8: Enabling the Accessibility Mode in PeopleSoft

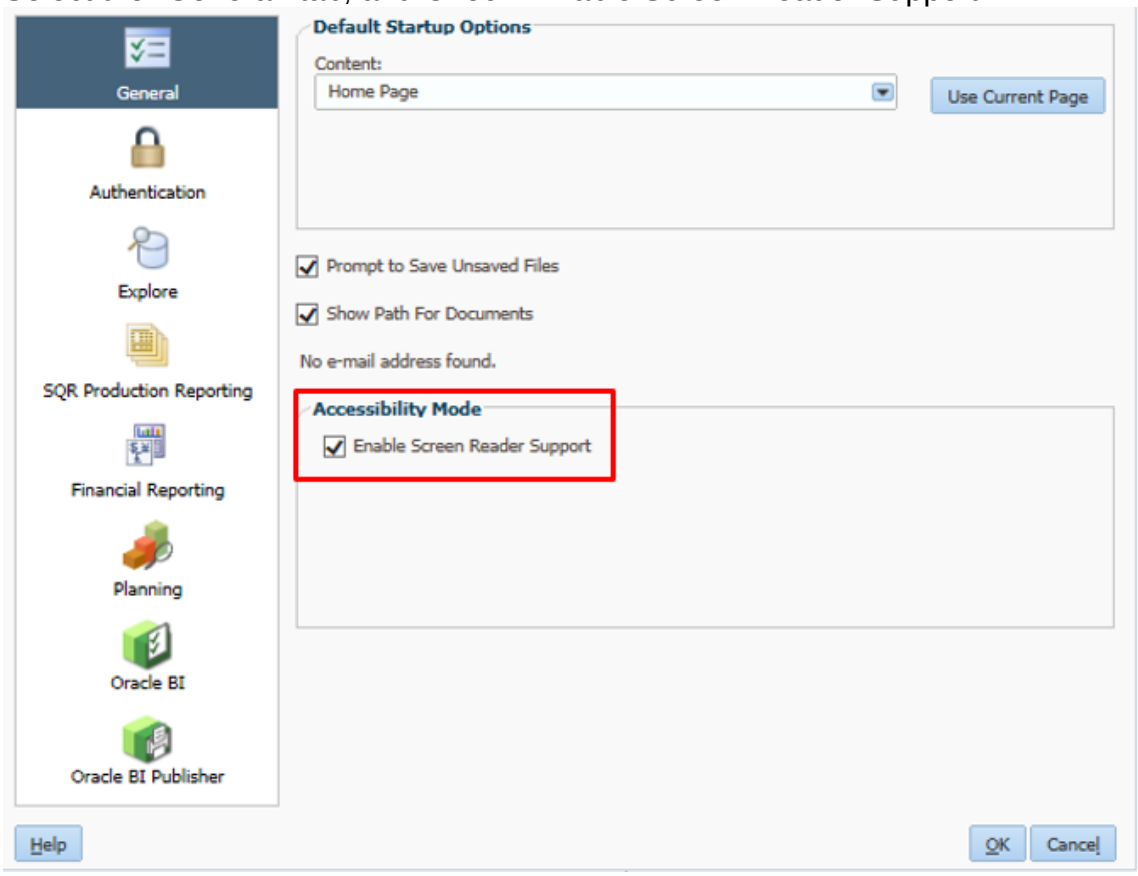
Step	Action
1	Log on to PeopleSoft with the specific user ID that requires the accessibility mode.
2	From the PeopleSoft Home Screen, select Main Menu and "My Personalizations." 
3	Select "Personalize General Options".

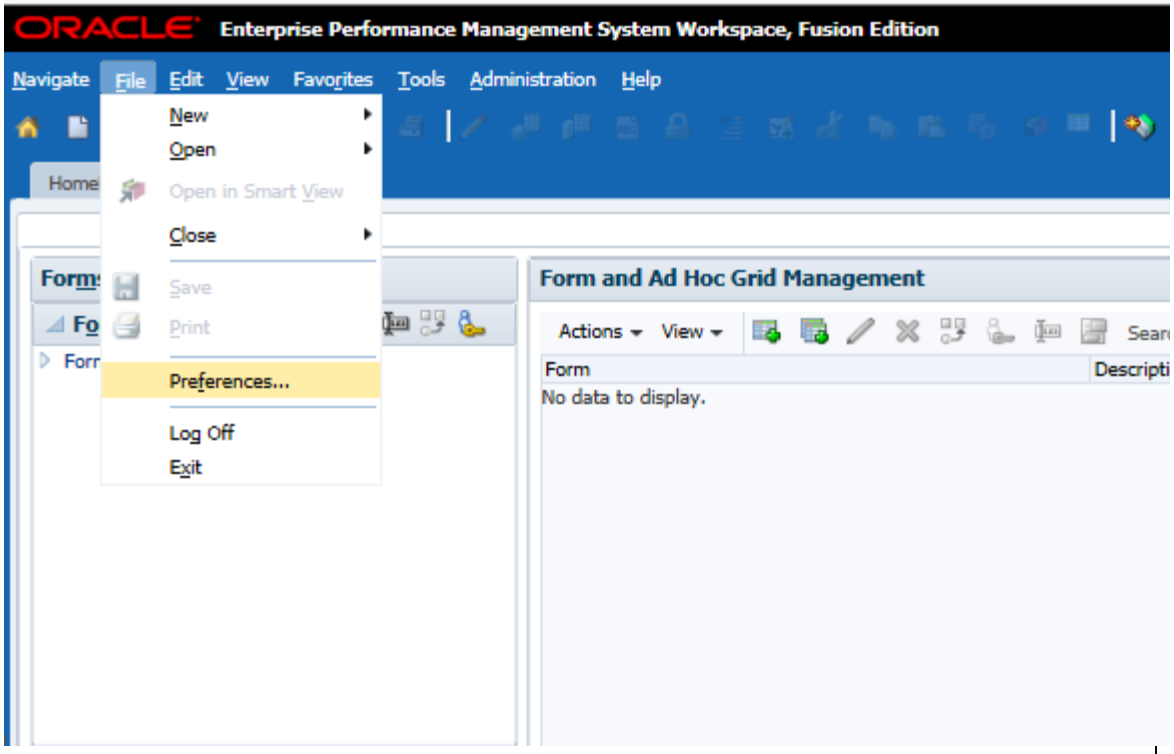
Step	Action
	
4	Select “Use accessible layout mode” under Accessibility Features and click “OK.” 

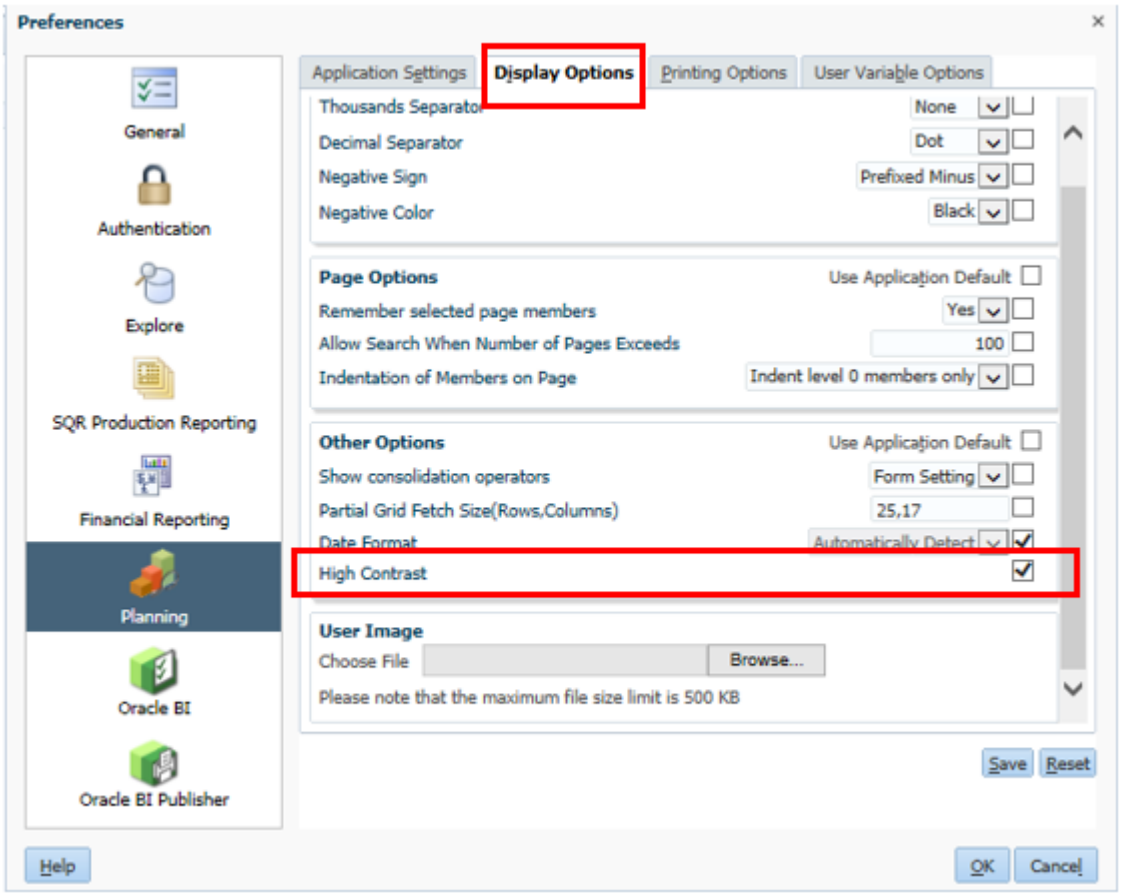
Hyperion Accessibility Mode

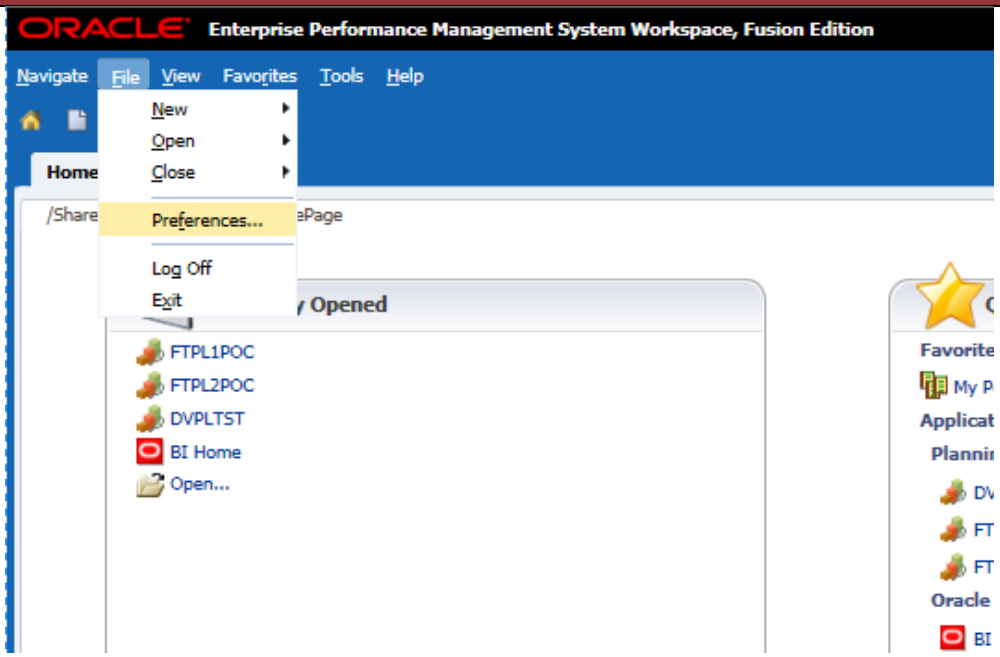
Table 9: Enabling the Accessibility Mode in Hyperion

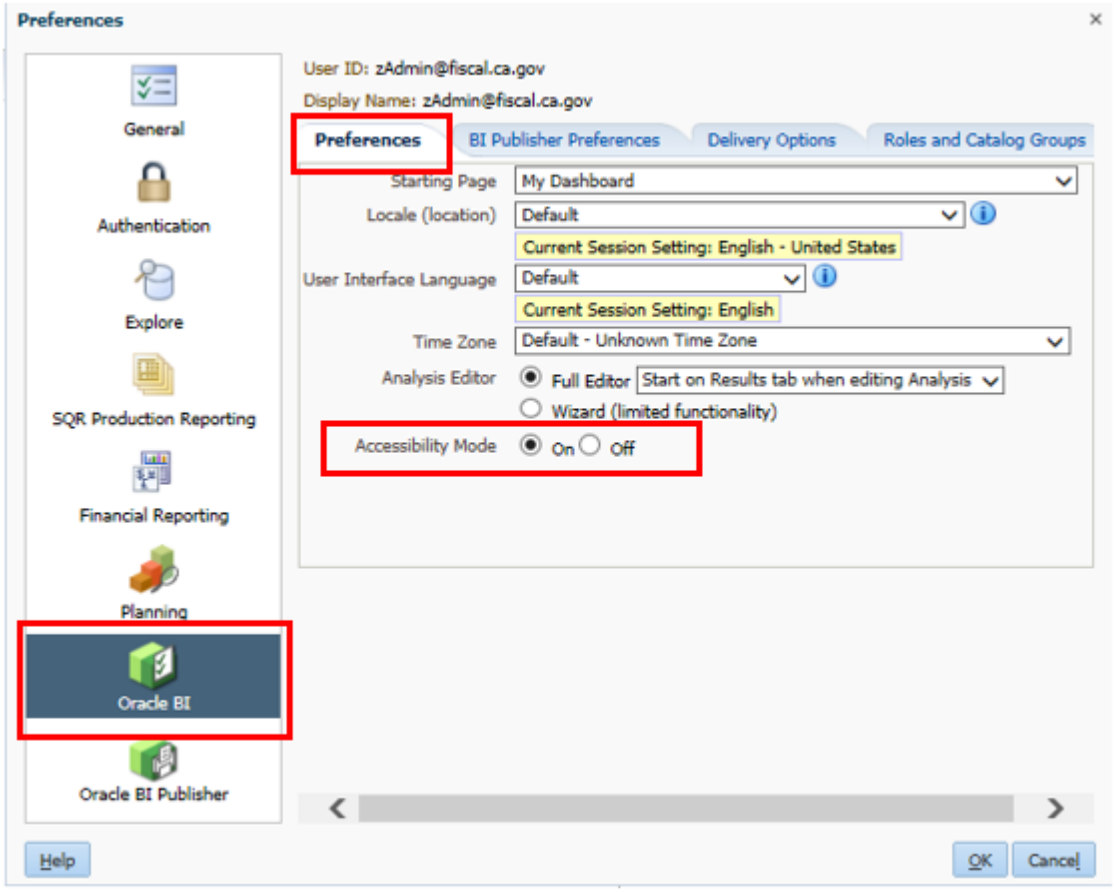
Step	Action
1	To enable Workspace Accessibility, log on to Hyperion as the user that requires Accessibility Mode.
2	Select “File”, and “Preferences”. 

Step	Action
3	Select the “General” tab, and Check “Enable Screen Reader Support.”  Click “OK.”

Step	Action
	To enable High Contrast Mode in Planning, open the desired Planning application from the Workspace. Select File -> Preferences  Select “Planning” from the application list, “Display Options” tab, and “High Contrast” option.

Step	Action
	
4	To enable Accessibility Mode in BIP, log into the Workspace and select the File -> Preferences menu.

Step	Action
	 Select Oracle BI from the application list on the left, the “Preferences” tab, and the Accessibility Mode “On” radio button.

Step	Action
	

6 Departmental Configuration

Whitelists for FI$Cal Training Academy

FTA users are to work with their IT departments to ensure they can:

1) receive emails from the FTA and

2) access the FTA.

It will be necessary to whitelist the following, including the IP Addresses.

- FTA Email - austinvm12.netdimensions.com (Public IP Address 207.200.26.17)
- FTA - https://mss.netdimensions.com/mss/servlet/ekp/login?getnews=Y (Public IP Address 207.200.26.44)

Appendix A. Acronyms and Glossary

The following terms and acronyms are used in this document:

Acronym/Term	Definition
BI	Business Intelligence
CPU	Central Processing Unit
DWORD	Double word. A numerical value of twice the size of a word, typically 32 bits.
EPM	Enterprise Performance Management
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
IAM	Identity & Access Management
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
Whitelist	A list of approved websites that can be visited by users and where the viewed content is not blocked.
Workflow notification	An email notice to a specific user or users informing them that an action is required within the System, for example, an approval.
XML	Extensible Markup Language
XUL	Extensible Markup User Interface Language