

**State of California**



## **End-User Workstation Configuration Guide**

**Version 9.0**

**November 2021**

# Table of Contents

<b>STATE OF CALIFORNIA</b> .....	<b>1</b>
<b>END-USER WORKSTATION CONFIGURATION GUIDE</b> .....	<b>1</b>
<b>VERSION 9.0</b> .....	<b>1</b>
PURPOSE.....	3
NETWORK CONNECTIVITY .....	3
HARDWARE AND SOFTWARE REQUIREMENTS .....	3
<i>Operating Systems</i> .....	3
<i>Browser Compatibility</i> .....	4
<i>What is “Certification” for Browser Compatibility?</i> .....	4
<i>Applications Covered</i> .....	4
CERTIFIED BROWSERS .....	4
PRODUCTIVITY SOFTWARE .....	5
ACCESSIBILITY SOFTWARE .....	5
HARDWARE .....	5
WORKSTATIONS CONFIGURATION PROCEDURES.....	6
BROWSER CONFIGURATION .....	6
CONFIGURATION FOR PEOPLESOFT FINANCIALS USERS .....	6
CONFIGURATION FOR HYPERION PLANNING USERS.....	6
<i>Browser Configuration for Hyperion Users</i> .....	6
CHROME .....	6
EDGE.....	6
<i>FireFox</i> .....	6
<i>Registry Modification</i> .....	7
SPREADSHEET UPLOADS .....	7
ENABLING MACROS IN EXCEL .....	7
<i>Macro Security Settings in Excel</i> .....	7
CLIENT SOFTWARE INSTALLATION.....	7
<i>Oracle SmartView Installation for Hyperion</i> .....	7
ACCESSIBILITY .....	11
PEOPLESOFT ACCESSIBILITY MODE .....	11
<i>Enabling the Accessibility Mode in PeopleSoft</i> .....	11
HYPERION ACCESSIBILITY MODE .....	13
<i>Enabling the Accessibility Mode in Hyperion</i> .....	13
APPENDIX A. ACRONYMS AND GLOSSARY .....	15

## 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.

## 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. For a list of applications and the current URLs, please refer to “Access FI\$Cal” page of the [fiscal.ca.gov](http://fiscal.ca.gov) site.

Table 1: FI\$Cal Application URLs

Application	URL
PeopleSoft Financials	<a href="https://financials.fiscal.ca.gov/psp/psfpd1/?cmd=start">https://financials.fiscal.ca.gov/psp/psfpd1/?cmd=start</a>
Hyperion Planning	<a href="https://epm.fiscal.ca.gov/workspace/index.jsp">https://epm.fiscal.ca.gov/workspace/index.jsp</a>
FI\$Cal Service Now	<a href="https://fiscalcustomerportal.fiscal.ca.gov/csm">https://fiscalcustomerportal.fiscal.ca.gov/csm</a>
Identity Self Service	<a href="https://sso.iam.fiscal.ca.gov/identity">https://sso.iam.fiscal.ca.gov/identity</a>
Open FI\$Cal	<a href="http://open.fiscal.ca.gov/">http://open.fiscal.ca.gov/</a>
Cal eProcure	<a href="http://caleprocure.ca.gov/pages/index.aspx">http://caleprocure.ca.gov/pages/index.aspx</a>
FI\$Cal Business Intelligence	<a href="https://app.powerbigov.us/home?ctid=fb3a0231-e0ce-44e6-8df2-a18195dd597e">https://app.powerbigov.us/home?ctid=fb3a0231-e0ce-44e6-8df2-a18195dd597e</a>

## Hardware and Software Requirements

### Operating Systems

FI\$Cal supports Windows 10 operating systems for end-user workstations. Oracle certified Windows 10 for use with FI\$Cal applications.

FI\$Cal provides full support on Windows 10 as of May 24, 2017.

## 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
- Hyperion Planning
- Identity and Access Management (password changes)

## 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.

Table 2: Certified Browsers

Product	Edge (Chromium) 79.x	Edge (Chromium) 80+	Chrome 79.x	Chrome 80+	FF 78.9 ESR	FF 87.x	Edge (legacy) 42.18362
PeopleSoft	X	X	X	X	X	X	X
Hyperion Planning		X		X	X	X	
Identity Access Mgmt (IAM)	X	X	X	X	X	X	X

## 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
<b>Microsoft Word</b> (2010, 2013, 2016)	Viewing reports or attachments formatted in Microsoft Word.
<b>Microsoft Excel</b> (2010, 2013, 2016)	Viewing reports or attachments formatted in Microsoft Excel.
<b>Adobe Reader</b> (9.5 or higher)	Viewing reports or attachments formatted in Adobe PDF.
<b>Notepad</b> (or comparable text editor)	Viewing reports or attachments formatted in plain text (e.g. comma-delimited, flat files).
<b>Email Client</b> (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
<b>Random Access Memory (RAM)</b>	4 GB RAM minimum
<b>Central Processing Unit (CPU)</b>	1.7+ GHz CPU minimum, multicore CPU recommended
<b>Monitor</b>	Display of 1024x768 resolution or higher and High Color (16 bit) mode for the best display results (800 x 600 minimum) For Hyperion, please use a display of 1366x768 resolution or higher.
<b>Mouse</b>	Standard
<b>Keyboard</b>	Standard
<b>Printer</b>	Laser
<b>Scanner</b>	Access to an office scanner capable of scanning paper documents into Adobe PDF format

## Workstations Configuration Procedures

### Browser Configuration

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

### Configuration for PeopleSoft Financials Users

None.

### Configuration for Hyperion Planning Users

The configuration for Hyperion planning users is shown below.

#### Browser Configuration for Hyperion Users

##### Chrome

Step 1: Enable Pop-ups exception for Hyperion application using instructions provided by Chrome.

##### Edge

Step 1: Enable Pop-ups exception for Hyperion application using instructions provided by Edge.

##### FireFox

Step 1: Enable Pop-ups exception for Hyperion application using instructions provided by

Firefox.

## Registry Modification

- Click Start > Run > Regedt32 > Enter.
- Navigate to the following location: My Computer\HKEY\_CURRENT\_USER\Software\Microsoft\Windows\CurrentVersion\Internet Settings.
- Right Click on “Internet Settings” > New > DWORD Value 32-bit.
- Name it “ReceiveTimeout.”
- Right Click on “ReceiveTimeout” > Select “Modify.”
- Check “Decimal” > In “Value Data” section and enter “480000.”
- Click “OK.”
- Repeat the above process for each of remaining 2 DWORD Values listed below:
- KeepAliveTimeout = 180000
- ServerInfoTimeout = 180000
- 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 Service Now here: <https://fiscalcustomerportal.fiscal.ca.gov/csm>

## 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.

### Macro Security Settings in Excel

Excel 2010 & 2013 - [Change Macro security in Excel for 2010 and 2013](#)

## 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 Intelligence (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,

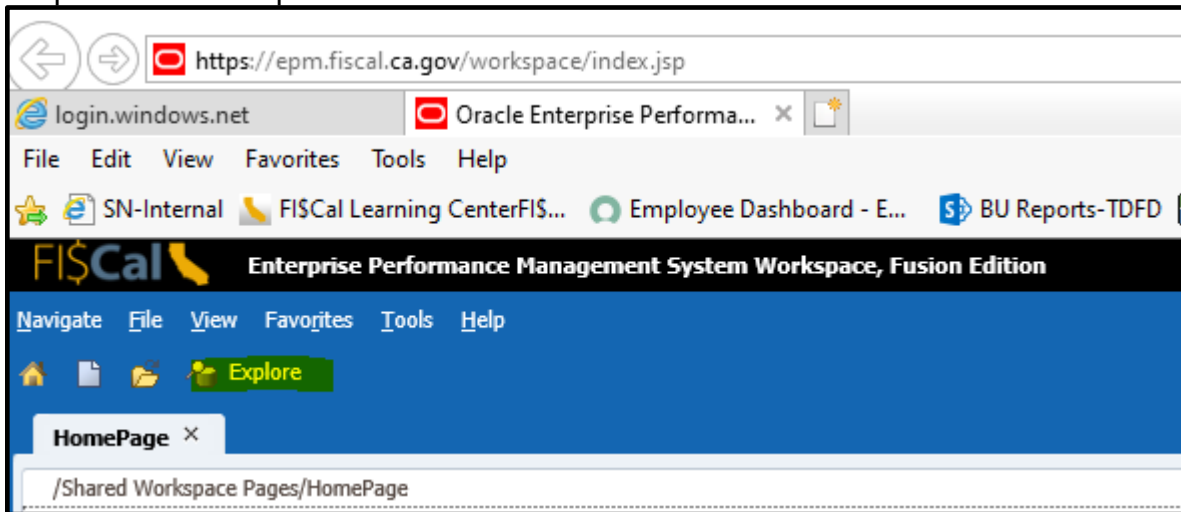
distribute, and share data in Microsoft Excel, Word and PowerPoint interfaces. FI\$Cal recommends that users install SmartView only through EPM Workspace (steps below). Downloading SmartView directly from Oracle’s website is not supported by FI\$Cal.

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

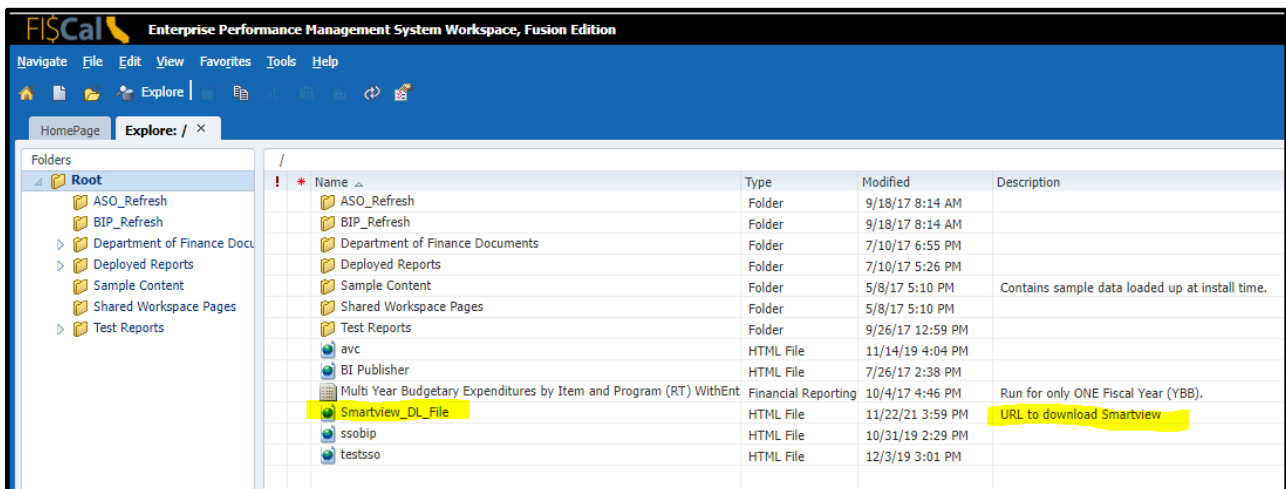
Step 1. Log on to the computer with local administrator privileges.

Step 2. Login to [FISCal Enterprise Project Management and Business Intelligence URL \(https://epm.fiscal.ca.gov/workspace/index.jsp\)](https://epm.fiscal.ca.gov/workspace/index.jsp).

Step 3. Click on Explore.

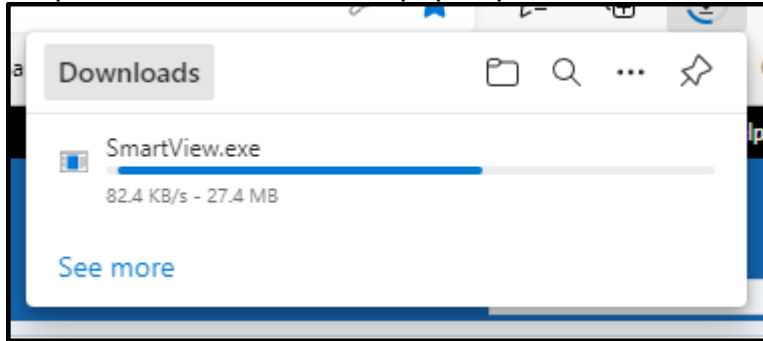


Step 4. Click on “Smartview\_DL\_File” under Name.

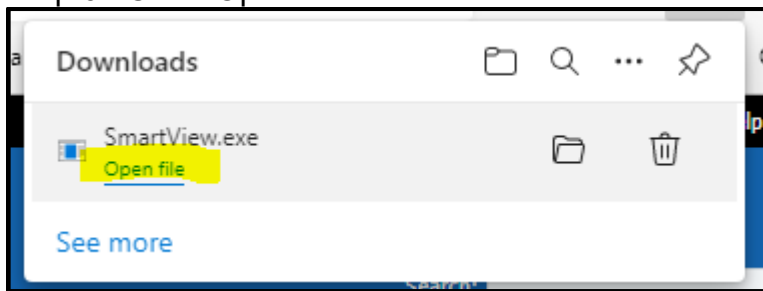




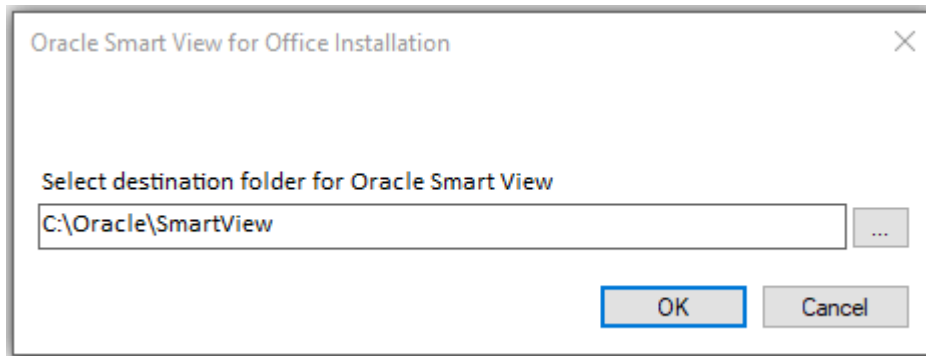
Step 5. Downloads window pops up.



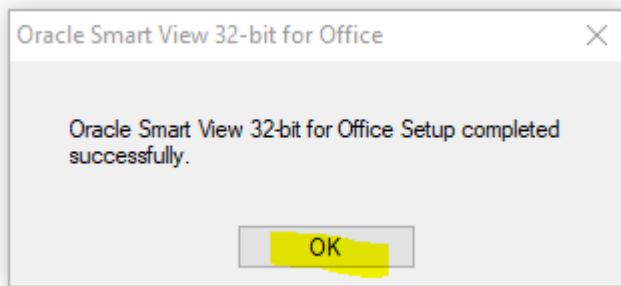
Step 6. Click "Open file".



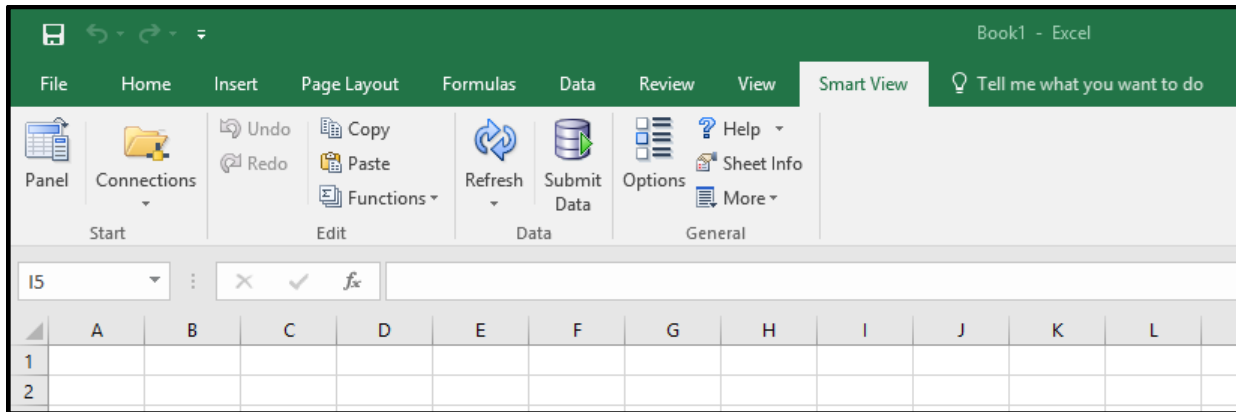
Step 7. Enter C:\Oracle\SmartView as destination folder. Click "OK".



Step 8. Click "OK" on the pop-up window that says installation is successful.

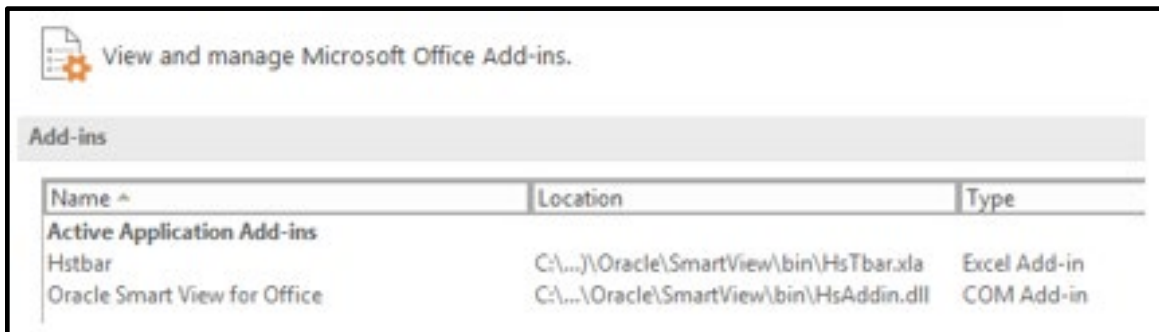


Step 9. Open MS Excel. A new menu called “SmartView” will appear in the top menu.



Step 10. If you didn't see the SmartView tab, check if SmartView add-ins are active in Excel Options:

- Go to File > Options
- Select "Add-Ins" from left navigation menu.
- Select "Disabled Items" from the manage drop down list on "Add-Ins" page and press "Go" button right next to the drop-down menu.
- A new pop-up dialog appears listing all disabled Add-Ins.
- Select all Add-Ins belonging to Hyperion SmartView (i.e. HsTbar.xla).
- Press the "Enable" button to enable your selection. It should be similar to the screenshot below afterwards.



- Check that SmartView option now appears on the top menu.
- Click “SmartView”.
- Click “Options.”
- In the shared connection URL field, enter the SmartView URL as:  
<https://epm.fiscal.ca.gov/workspace/SmartViewProviders>
- Click “OK” to save.

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

- Log on to the computer with local administrator privileges to uninstall the older version.
- Follow previous steps on new installation.

## Accessibility

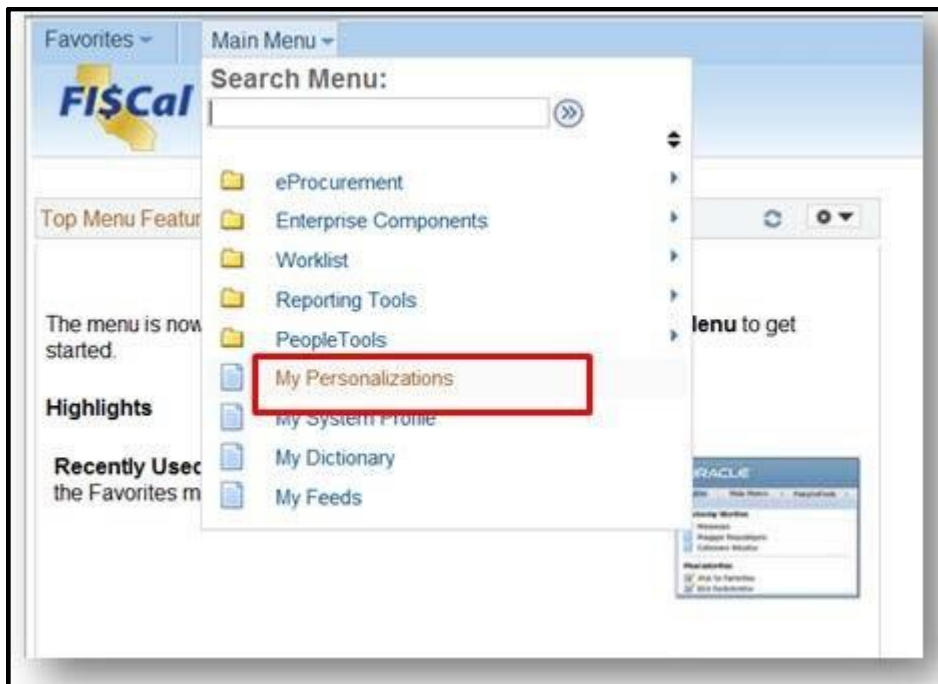
When using FI\$Cal with a screen reader, a user must enable the accessibility mode in their user preferences as described in Table 8 below.

### PeopleSoft Accessibility Mode

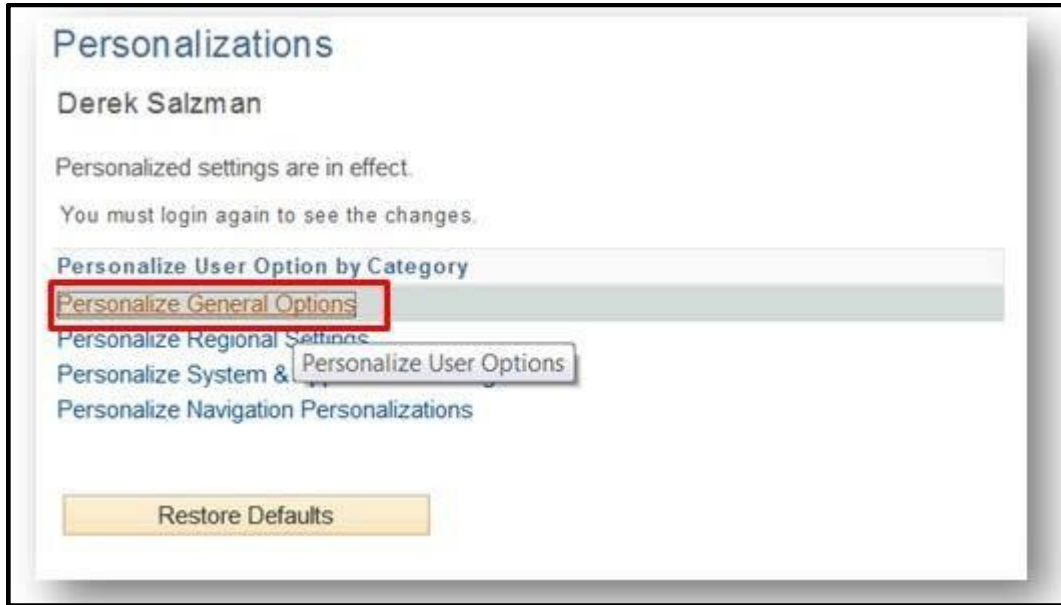
Enabling the Accessibility Mode in PeopleSoft

Step 1. Log on to PeopleSoft with the specific user ID that requires the accessibility mode.

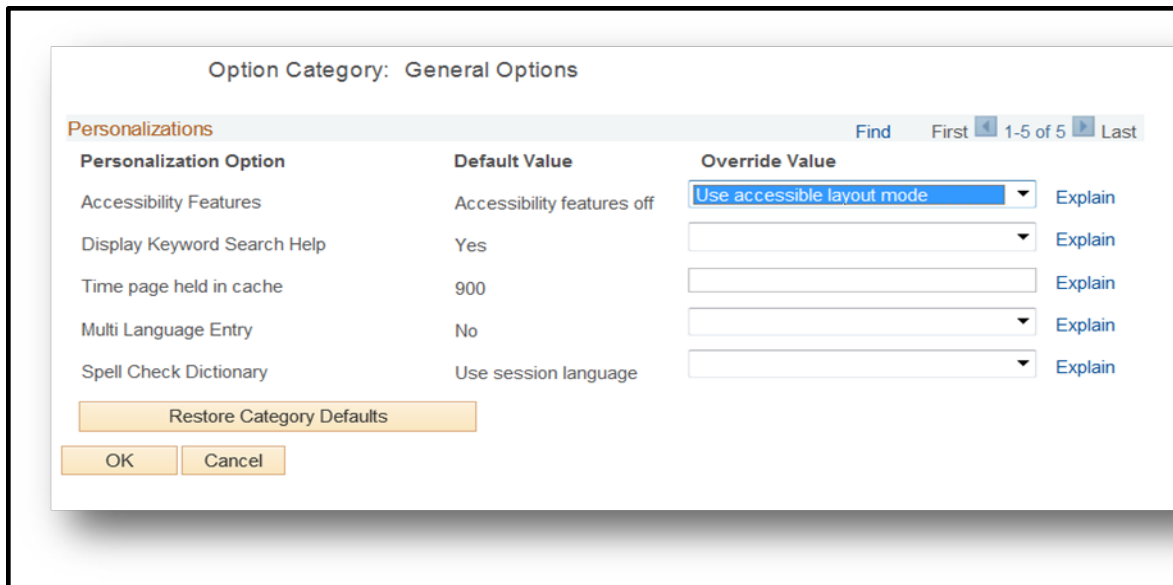
Step 2. From the PeopleSoft Home Screen, select Main Menu and “My Personalizations.”



Step 3 Select "Personalize General Options".



Step 4 Select "Use accessible layout mode" under Accessibility Features and click "OK."

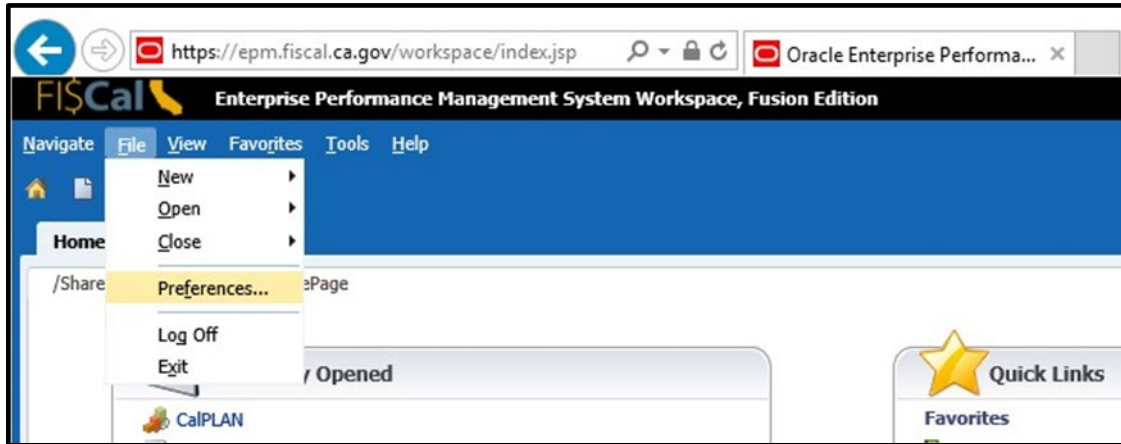


## Hyperion Accessibility Mode

### Enabling the Accessibility Mode in Hyperion

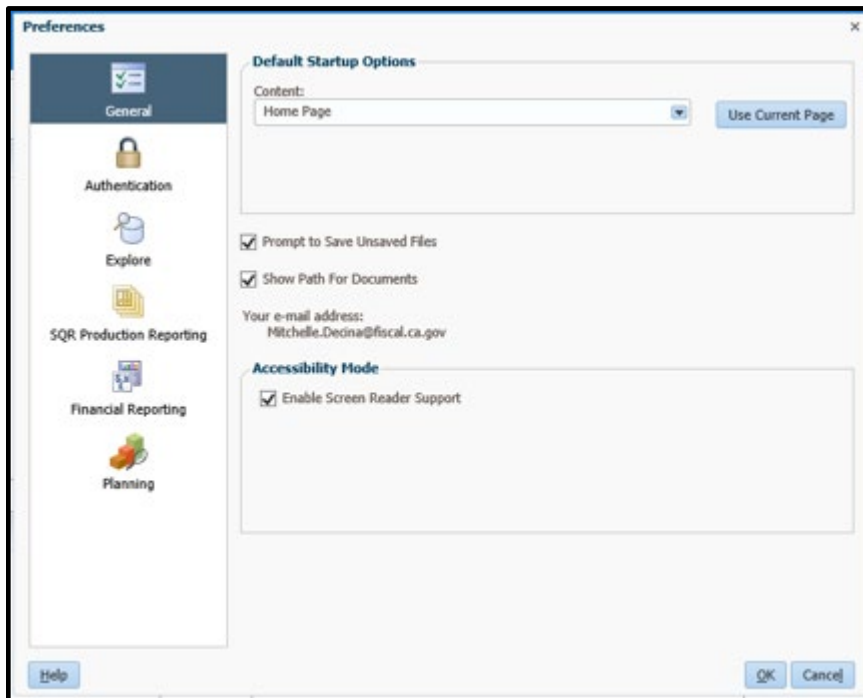
Step 1. To enable Workspace Accessibility, log on to Hyperion as the user that requires Accessibility Mode.

Step 2. Select “File”, and “Preferences”.

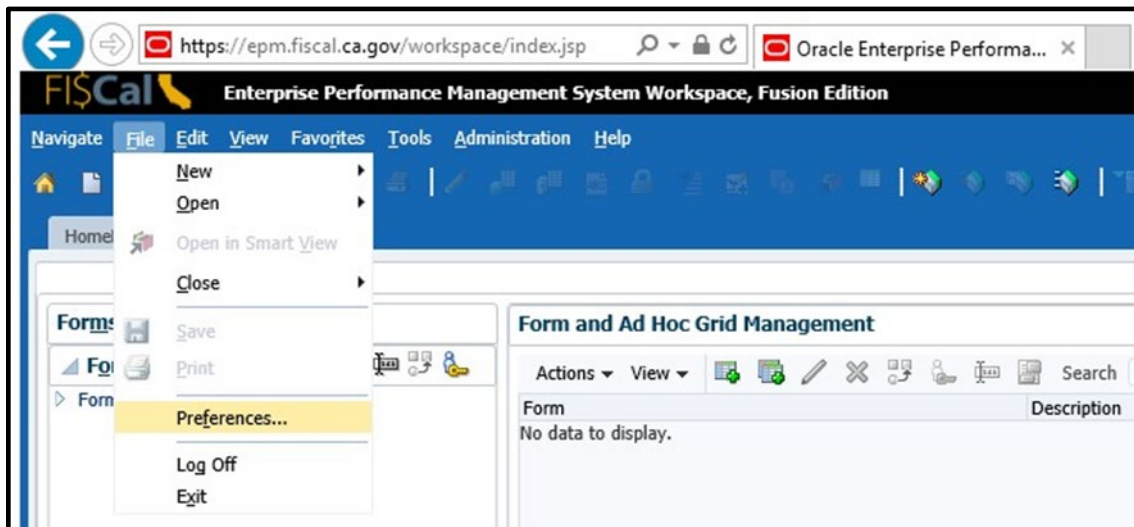


Step 3. Select the “General” tab, and Check “Enable Screen Reader Support.” Click “OK”.

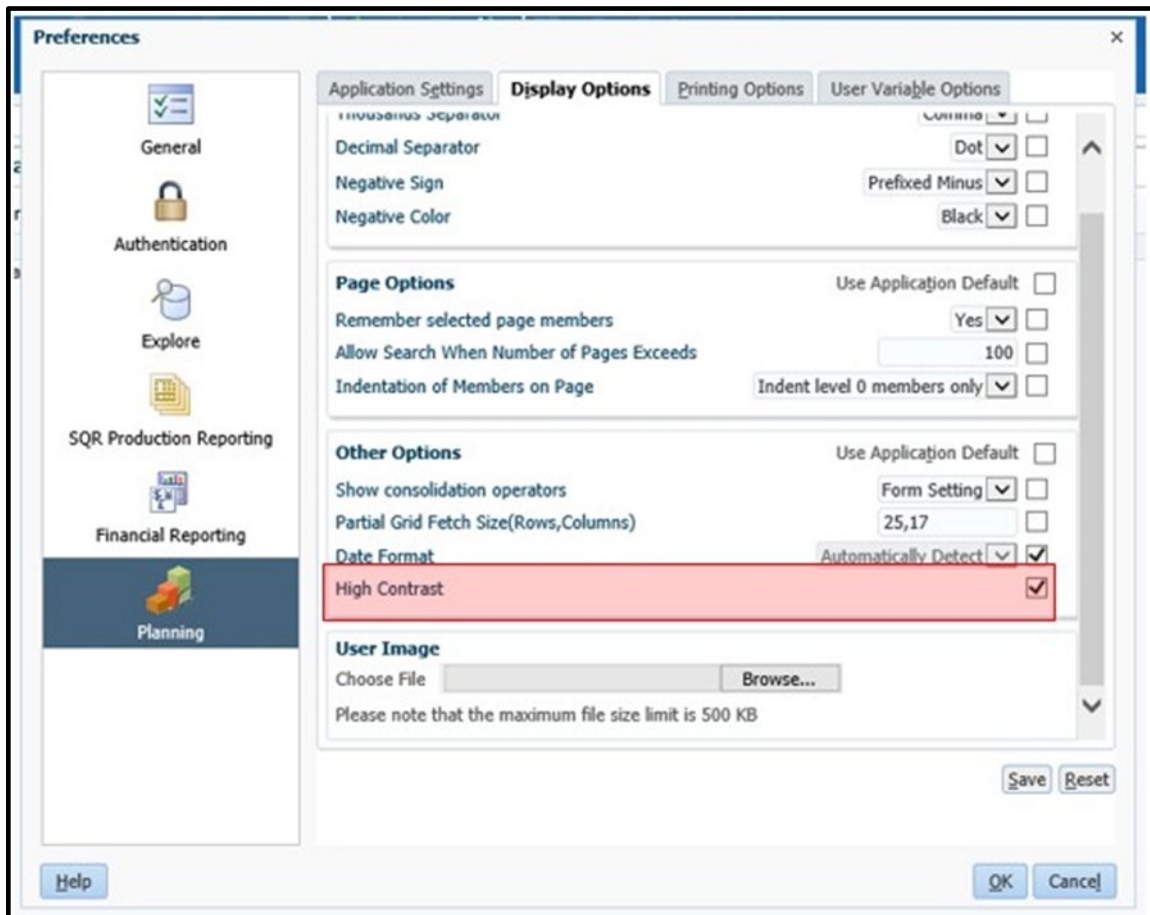
Log off and restart the browser for this change to take effect.



To enable High-Contrast Mode in Planning, open the desired Planning application from Workspace. Select File > Preferences.



Select "Planning" from the application list, "Display Options" tab, and "High-Contrast" option.



## 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
IAM	Identity & Access Management
JAWS	Job Access 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
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