State of California

End-User Workstation Configuration Guide

Version 8.0

August 2019
## Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Revision</th>
<th>Last Updated By</th>
<th>Change</th>
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</thead>
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<tr>
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<td>1.0</td>
<td>Derek Salzman</td>
<td>Document Creation.</td>
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</tr>
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<td>Revised URLs for SmartView. Changed “Smart View” to “SmartView”. Updated the Wave 1 reference to Wave1 and Wave 2 in 3.2.2. Applications covered.</td>
</tr>
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<tr>
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<td>2/29/16</td>
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<td>3/9/16</td>
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<td>5.1</td>
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<td>SmartView and Hyperion updates</td>
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<td>Mitchelle Decina</td>
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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.

Table 1: FI$Cal Application URLs

<table>
<thead>
<tr>
<th>Application</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal</td>
<td>FISCal Portal URL</td>
</tr>
<tr>
<td>PeopleSoft Financial Planning</td>
<td>PeopleSoft Financials URL</td>
</tr>
<tr>
<td>Hyperion Planning</td>
<td>Hyperion Planning URL</td>
</tr>
<tr>
<td>FI$Cal Service Now</td>
<td>FISCal Service Now URL</td>
</tr>
</tbody>
</table>

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
- PeopleSoft Portal
- Hyperion Planning
- Identity and Access Management (password changes)
- University of FI$Cal (UF)

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. IE and Edge are Microsoft web browsers. FF is a Mozilla Firefox web browser. Chrome is a Google web browser.

Table 2: Certified Browsers

<table>
<thead>
<tr>
<th>Product</th>
<th>Edge 20.10240</th>
<th>IE 11</th>
<th>IE 10</th>
<th>IE9</th>
<th>IE8</th>
<th>FF 45+*</th>
<th>FF 31**</th>
<th>FF 30**</th>
<th>FF 24**</th>
<th>FF 17**</th>
<th>Chrome 35</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Hyperion Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Univ of Fiscal (UF)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identity Access Mgmt (IAM)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* 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
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

<table>
<thead>
<tr>
<th>Application</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Word (2010, 2013, 2016)</td>
<td>Viewing reports or attachments formatted in Microsoft Word.</td>
</tr>
<tr>
<td>Microsoft Excel (2010, 2013, 2016)</td>
<td>Viewing reports or attachments formatted in Microsoft Excel.</td>
</tr>
<tr>
<td>Adobe Reader (9.5 or higher)</td>
<td>Viewing reports or attachments formatted in Adobe PDF.</td>
</tr>
<tr>
<td>Notepad (or comparable text editor)</td>
<td>Viewing reports or attachments formatted in plain text (e.g. comma-delimited, flat files).</td>
</tr>
<tr>
<td>Email Client (State of California account required - does not need to be provided by OTech)</td>
<td>Communicating. For example, used in workflow processing.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Random Access Memory (RAM)</td>
<td>4 GB RAM minimum</td>
</tr>
<tr>
<td>Central Processing Unit (CPU)</td>
<td>1.7+ GHz CPU minimum, multicore CPU recommended</td>
</tr>
<tr>
<td>Monitor</td>
<td>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.</td>
</tr>
<tr>
<td>Mouse</td>
<td>Standard</td>
</tr>
<tr>
<td>Keyboard</td>
<td>Standard</td>
</tr>
<tr>
<td>Printer</td>
<td>Laser</td>
</tr>
<tr>
<td>Scanner</td>
<td>Access to an office scanner capable of scanning paper documents into Adobe PDF format</td>
</tr>
</tbody>
</table>

Workstations Configuration Procedures

Browser Configuration

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

Configuration for PeopleSoft Financials Users

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

Table 5: Browser Configuration for PeopleSoft Users

<table>
<thead>
<tr>
<th>Browser</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer 11</td>
<td>Certified in standard mode with People Tools 8.53.11 and higher. Running in compatibility mode is not required.</td>
</tr>
<tr>
<td>Internet Explorer 10</td>
<td>Enable Compatibility or Quirks mode, the default configuration. Standard mode 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.</td>
</tr>
<tr>
<td>Internet Explorer 9</td>
<td>Enable standard mode, the default configuration. Compatibility View is not supported.</td>
</tr>
<tr>
<td>Firefox 30</td>
<td>Use the default configuration.</td>
</tr>
</tbody>
</table>
Configuration for Hyperion Planning Users

The configuration for Hyperion planning users is shown below.

Browser Configuration for Hyperion Users
Internet Explorer (All Versions)
Step 1. Current Hyperion users are to disable Enterprise Mode by unchecking the Enterprise Mode option. New users are to skip to Step 4.
   - Open IE browser.
   - Select Tools from menu bar

Step 2. Enterprise Mode will show as checked. Click on Enterprise Mode to disable it.

Step 3. Close the browser and clear cache.

Step 4. Enable “Check for new version every time user visits page”:
   - Click Tools > Internet Options > General Tab > Browsing History Section > Settings.
   - Check the option “Every time I visit the webpage.”
   - Click “OK.”

Step 5. Enable pop-ups from Hyperion
   - Click Tools > Internet Options > Privacy Tab.
   - Click “Settings.”
   - Enter “*.fiscal.ca.gov” in the “Address of website to allow:” box and click “Add.”
   - Click “Close.”
   - Uncheck “Turn on Pop-up Blocker.”
   - Click “Apply.”
   - Click “OK.”

Step 6. Add Workspace URL to trusted sites
   - Click Tools > Internet Options > Security Tab.
   - Select “Trusted Sites” > Click “Sites” button.
- Under “Add this website to the zone,” enter the Workspace URL (https://epm.fiscal.ca.gov).
- Click “Add.”
- Uncheck "Require server verification (https:) for all sites in this zone"
- Click “Close” > Click “OK.”

Step 7. Customize Security Settings for Trusted Sites

- Click Tools > Internet Options > Security Tab.
- Select “Trusted sites.”
- Click “Custom level….”
- Scroll down to the “Miscellaneous” section.
  - Select “Access data sources across domains” > Enable.
  - Select “Allow script-initiated windows without size or position constraints” >Enable.
- Select “Run ActiveX controls and plug-ins” > Enable.
- Select “Script ActiveX controls marked safe for scripting” > Enable.
- Click “OK.”

Step 8. Minimize security setting for trusted sites

- Click Tools > Internet Options > Security Tab.
- Select “Trusted Sites” > Select “Custom Level.”
- 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).
- Click “Reset. Click “OK”.

Step 9. Allow session cookies for specific sites

- Click Tools > Internet Options > Privacy Tab.
- Click “Sites.”
- Enter “ca.gov” in “Address of website” box.
- Click Allow.
- Click “OK.”
- Click Advanced. Check the "Override automatic cookie handling", accept the first and third-party cookies and check the "Always allow session cookies" option.
- Click “OK.”

Step 10. Allow encrypted pages to be saved to disk

- Click Tools > Internet Options > Advanced Tab.
- Security Section > Uncheck “Do not save Encrypted Pages to Disk.”
- Click “OK.”

Step 11. Enable Native XMLHTTP
- Click Tools > Internet Options > Advanced Tab.
- Select Security Section > Check “Enable Native XMLHTTP Support”.
- Click “OK.”

Step 12. Compatibility View Option
- Click Tools > Compatibility View Settings.
- 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.
- Uncheck all available options at the bottom of the list.
- Click Close.

Step 13. Set the Zoom setting to 100% to avoid browsing issues when using Internet Explorer 11 for Hyperion application
- Click View > Zoom.
- Set it to 100%.

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:

If “Compatibility View” is checked, remove the URL from the compatibility view list.
FireFox 31 ESR

Step 1: Enable Pop-ups
- Click Options > Content.
- Click “Exceptions.”
- Enter “fiscal.ca.gov” in the “Address of website:” box.
- Click “Allow.”
- Click “Close.”
- Click “OK.”

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 FISCal using Excel templates. Macros are required to be enabled. Job aids for each specific upload process will be posted to the FISCal 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.
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.

If not already installed on the workstation, do the following to install SmartView:
Step 1. Log on to FISCal Enterprise Project Management and Business Intelligence URL.
Step 2. Go to Tool > Install > SmartView.
Step 3. Click on “Run” in the pop-up window to install SmartView.
Step 4. Enter C:\Oracle\SmartView as destination folder. Click “OK”.

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Step 6. Click “OK” on the pop-up window that says installation is successful.

Step 7. Open MS Excel. A new menu called “SmartView” will appear in the top menu.

Step 8. 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:
  FISCal workspace SmartView Providers
- 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 (“If not already installed on the workstation, do the following to install SmartView”).

**Accessibility**
When using FISCal 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.

![Image of Preferences window with high contrast option selected]

**Departmental Configuration**

Whitelists for the University of FI$Cal

UF users are to work with their IT departments to ensure they can receive emails from the UF and access the UF.

Have your IT department whitelist the following, including the IP Addresses:

- UF Email - Public IP Address: 167.89.25.81
- UF – [FISCal University of FISCal URL](#) (Public IP Address: 18.217.68.153)

Many department use web filtering software that can impact connectivity with the UF. Whitelisting the UF and its IP Address help for a better user experience.

Appendix A.

FTA - FI$Cal Training Academy now known as the University of FI$Cal (UF)
UF - The University of FI$Cal formerly known as FI$Cal Training Academy (FTA)
## Appendix A. Acronyms and Glossary

The following terms and acronyms are used in this document:

<table>
<thead>
<tr>
<th>Acronym/Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI</td>
<td>Business Intelligence</td>
</tr>
<tr>
<td>CPU</td>
<td>Central Processing Unit</td>
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<tr>
<td>DWORD</td>
<td>Double word. A numerical value of twice the size of a word, typically 32 bits.</td>
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<tr>
<td>EPM</td>
<td>Enterprise Performance Management</td>
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<tr>
<td>EPPM</td>
<td>Enterprise Project Portfolio Management</td>
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<tr>
<td>ESR</td>
<td>Extended Support Release</td>
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<tr>
<td>FTA</td>
<td>FI$Cal Training Academy</td>
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<tr>
<td>GRC</td>
<td>Governance Risk and Compliance</td>
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<tr>
<td>HKEY</td>
<td>Handle to Registry Key</td>
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<tr>
<td>HTTPS</td>
<td>HyperText Transfer Protocol over SSL</td>
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<tr>
<td>IE</td>
<td>Internet Explorer</td>
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<tr>
<td>IAM</td>
<td>Identity &amp; Access Management</td>
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<tr>
<td>JAWS</td>
<td>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 applications.</td>
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<tr>
<td>JRE</td>
<td>Java Runtime Environment</td>
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<tr>
<td>OTech</td>
<td>Office of Technology Services</td>
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<tr>
<td>PCM</td>
<td>Primavera Contract Management</td>
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<tr>
<td>PDF</td>
<td>Portable Document Format</td>
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<tr>
<td>RAM</td>
<td>Random Access Memory</td>
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<tr>
<td>SSL</td>
<td>Secure Socket Layer</td>
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<tr>
<td>UPK</td>
<td>User Productivity Kit</td>
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<tr>
<td>URL</td>
<td>Uniform Resource Locator</td>
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<tr>
<td>Whitelist</td>
<td>A list of approved websites that can be visited by users and where the viewed content is not blocked.</td>
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<tr>
<td>Workflow notification</td>
<td>An email notice to a specific user or users informing them that an action is required within the System, for example, an approval.</td>
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<tr>
<td>XML</td>
<td>Extensible Markup Language</td>
</tr>
<tr>
<td>XUL</td>
<td>Extensible Markup User Interface Language</td>
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</table>