



# **Ministry of Education**

## **EFIS File Download Portal - User Guide**

### **School Board User**

**Version 1.2**

March, 2019

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## 1 Document History

The following shows the history of this document and all the updates that have been made to it since it was created.

Document History			
Version	Date	Changed by	Description of changes
1.0	February 2019	LFIB	Create document
1.1	February 2019	LFIB	Update after review
1.2	March 2019	LFIB	Finalized Version



## **2 About the EFIS File Download Portal**

The EFIS Download Portal is a repository of files which the ministry makes available to school boards on a regular basis. It contains files that were historically accessed through the Facilitating Documents folders in the ministry's EFIS 2.0 system. The portal also contains school boards' financial data, which was historically sent out via CD-ROM to its stakeholders. The portal includes data related to the four most recent years.

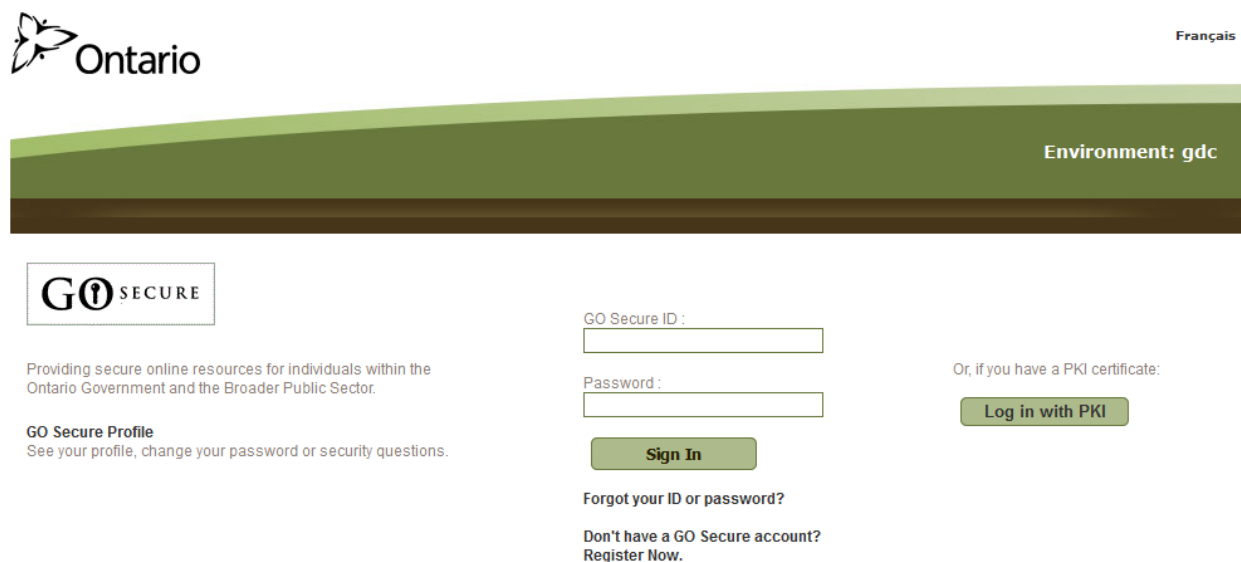


### 3 Logon to EFIS File Download Portal

In order to log into the EFIS File Download Portal, you must be registered for Go Secure; if you have not yet registered please follow the instructions in the [Registration Guide](#).

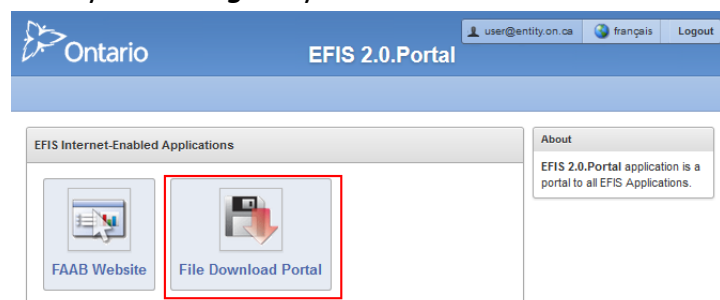
Once registered, visit the EFIS URL: [https://efis.fma.csc.gov.on.ca/apex/f?p=EFIS\\_GOS:HOME](https://efis.fma.csc.gov.on.ca/apex/f?p=EFIS_GOS:HOME).

The EFIS URL link will redirect to a Go Secure login page. Enter your **GO Secure ID** and **Password**



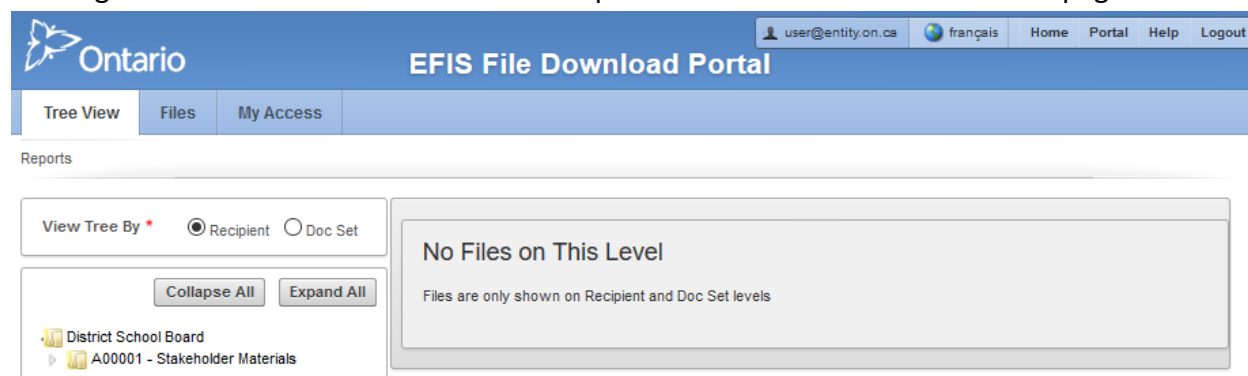
The image shows the Go Secure login page. At the top left is the Ontario logo. At the top right is the text "Français". Below the logo is a green banner with "Environment: gdc". The main content area has a "GO SECURE" logo on the left. Below it is the text "Providing secure online resources for individuals within the Ontario Government and the Broader Public Sector." and a link to "GO Secure Profile". In the center are input fields for "GO Secure ID:" and "Password:", with a "Sign In" button below them. To the right is a link "Or, if you have a PKI certificate:" and a "Log in with PKI" button. At the bottom are links for "Forgot your ID or password?" and "Don't have a GO Secure account? Register Now."

Once you click **Sign In** you will be directed to the EFIS 2.0 Portal home page.



The image shows the EFIS 2.0 Portal home page. At the top is a blue header with the Ontario logo, "EFIS 2.0.Portal", and user information. Below the header is a section "EFIS Internet-Enabled Applications" with two icons: "FAAB Website" and "File Download Portal". The "File Download Portal" icon is highlighted with a red box. To the right is an "About" box with text about the application.

Clicking the "File Download Portal" link will open the File Download Portal home page.



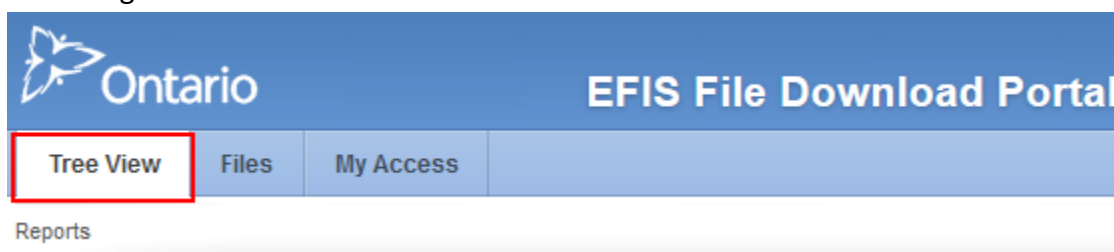
The image shows the EFIS File Download Portal home page. At the top is a blue header with the Ontario logo, "EFIS File Download Portal", and user information. Below the header is a section "Tree View" with tabs for "Files" and "My Access". Below the tabs is a "Reports" section with a "View Tree By" dropdown set to "Recipient". Below this are "Collapse All" and "Expand All" buttons. A tree view shows "District School Board" and "A00001 - Stakeholder Materials". To the right is a large box with the text "No Files on This Level" and "Files are only shown on Recipient and Doc Set levels".

## 4 File Organization and Navigation

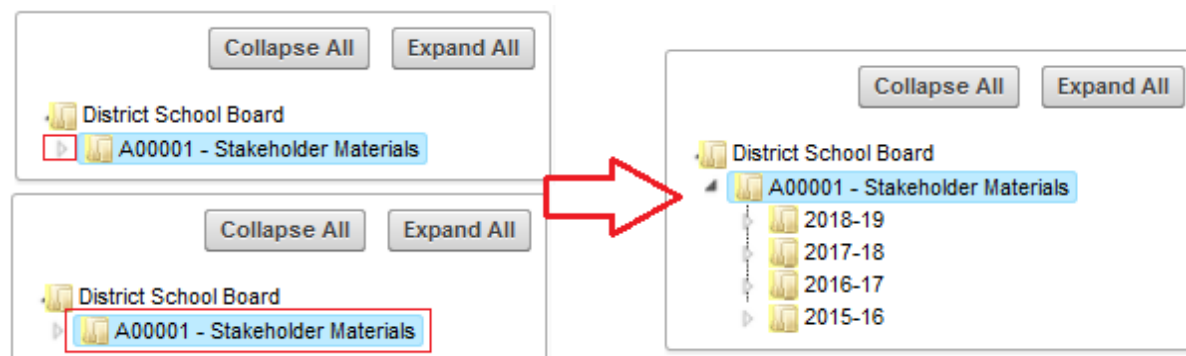
There are two ways for a user to view the files that they have access to in the portal. On top of the files being organized in these ways, the user has the ability to search, filter and sort the results they see on each of the screen. The details of these features are described in the following sections.

### 4.1 Tree View Tab

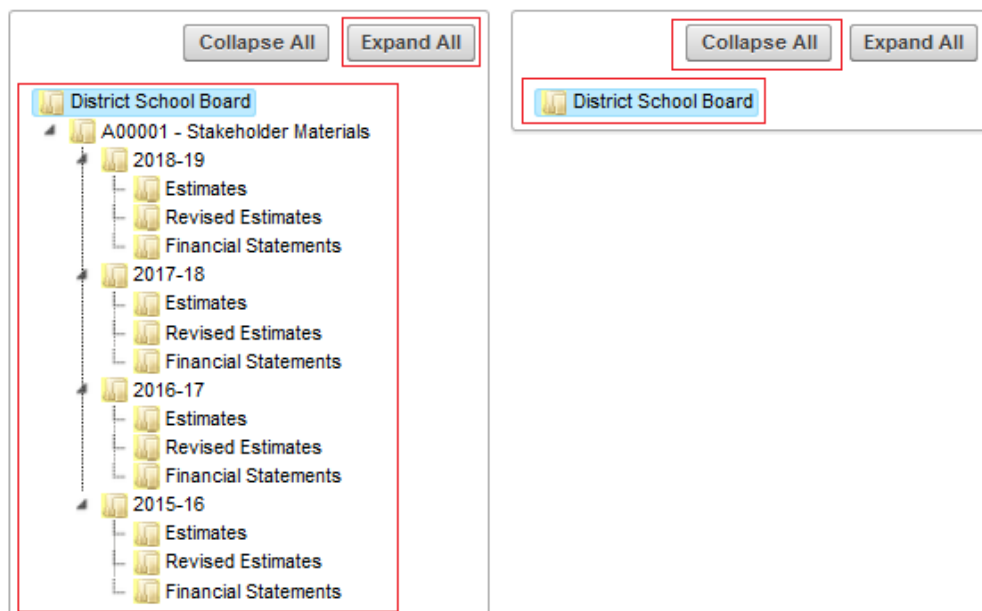
The Tree View, which is the default tab of the portal, is where the files that the user has access to are organized in a hierarchical folder view.



In order to access the needed files, the user must navigate through the different folders. The navigation is done by single clicking the arrow to the left of each folder, or double clicking on the folder name.

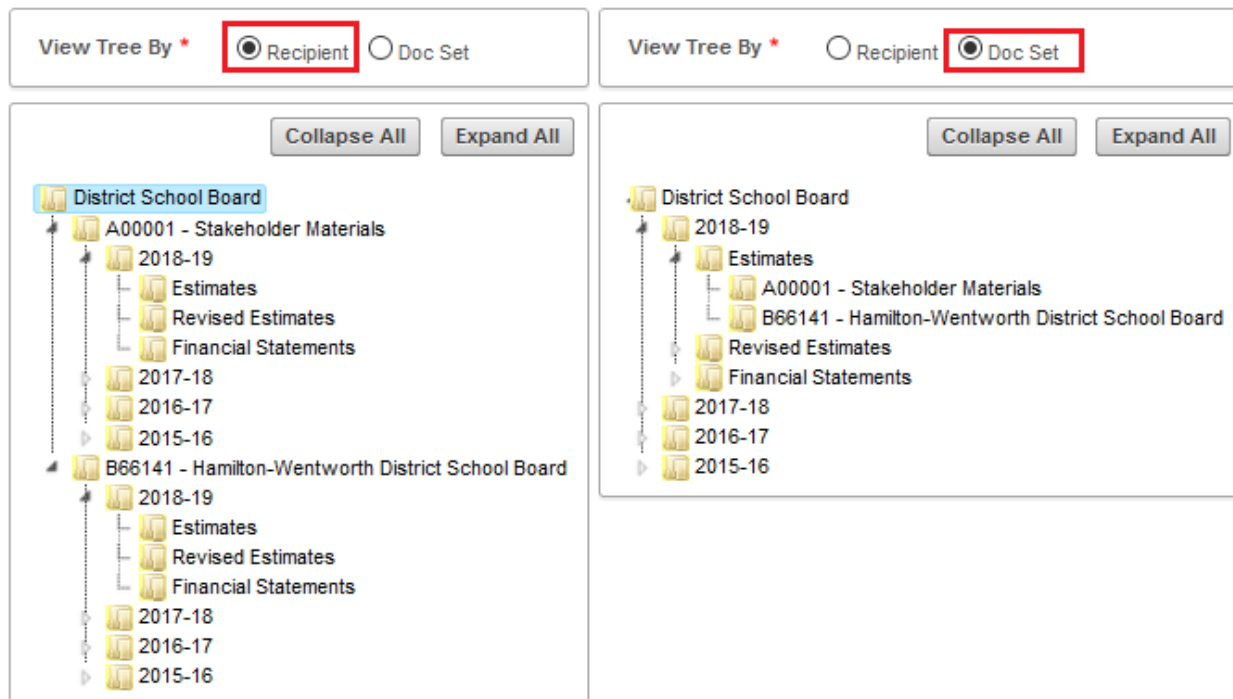


Clicking the “Expand All” button will display all the different folders available, and “Collapse All” will collapse back to top level. A gray arrow indicates that the folder has been expanded and a folder without an arrow next to it is at the bottom level (cannot be expanded further).



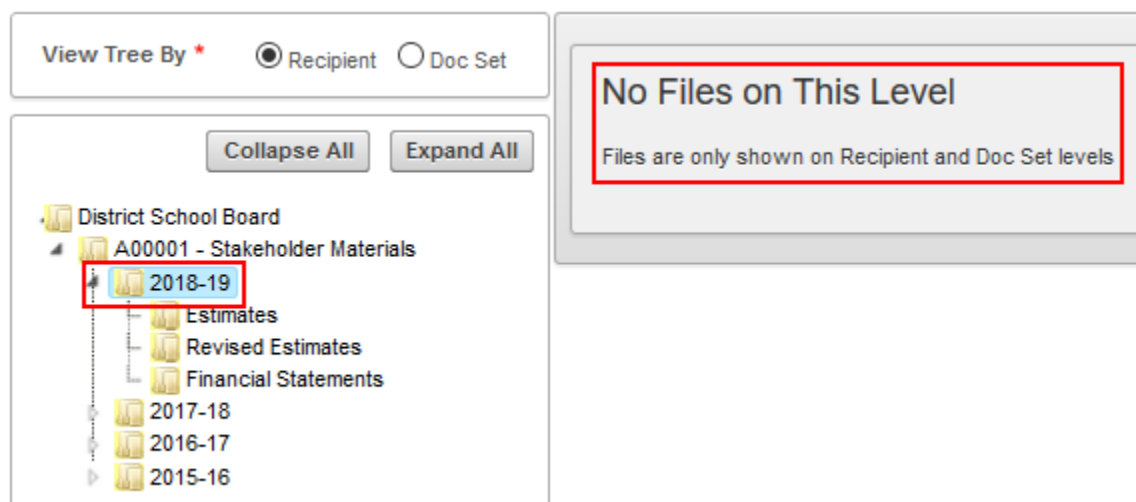
The files contained in the folders are only shown at the Recipient and Doc Set levels. The recipient refers to the District School Board (or collection of District School Boards) and the Doc Set (Document Set) refers to the combination of School Year and Cycle (e.g. 2017-18 Estimates). Please note: the stakeholder data is published together for all District School Boards and thus the only recipient available will be “A00001 – Stakeholder Materials”

The tree view can be sorted in two different ways: By Recipient (Recipient > School Year > Cycle) or by Doc Set (School Year > Cycle > Recipient).

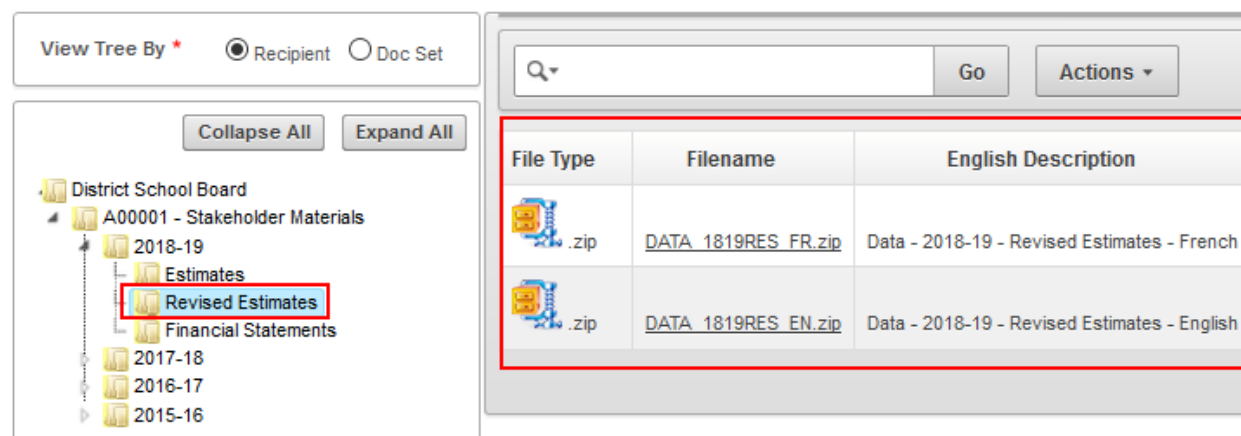




Files available for download are only accessible at two levels of the tree view: Recipient and Doc Set. This means that in order to see the files available the user must navigate to the correct level. For example, if the user navigates to 2018-19, they will not see any files and will get a message stating “No Files on This Level”



In order to view files related to 2018-19, the user must select the particular Doc Set they want to see (e.g. 2018-19 Revised Estimates), by selecting the lowest level folder (e.g. Revised Estimates)



If the user wishes to see all files related to a certain Recipient, they can click on the recipient name, and all the files related to that recipient regardless of Doc Set will be visible.

View Tree By ● Recipient ○ Doc Set

Collapse All Expand All

- District School Board
  - A00001 - Stakeholder Materials
  - B66141 - Hamilton-Wentworth District School Board**

Go
Actions ▼

File Type	Filename	Doc Set
.xlsx	<a href="#">LocalPrioritiesFunding_1819EST_Hamilton-Wentworth DSB.xlsx</a>	S1819EST
.xlsx	<a href="#">2017-18 Financial Statements School List - Hamilton-Wentworth DSB.xlsx</a>	S1718FIS
.xlsx	<a href="#">21_CAPTV8_1718_Hamilton-Wentworth DSB.xlsx</a>	S1718FIS
.xlsx	<a href="#">LocalPrioritiesFunding_Hamilton-Wentworth DSB.xlsx</a>	S1718FIS
.xlsx	<a href="#">School List for 2017-18 and 2018-19 for Hamilton-Wentworth DSB.xlsx</a>	S1718FIS

Please refer to section 5 *Searching, Filtering and Sorting Files* for detailed information on how to narrow down the list of files and take advantage of other capabilities of the portal.

## 4.2 Files Tab

The “Files” tab shows all the files that the user has access to shown in a single table. By default, the portal shows a list of 100 files per page. If the collection contains more than 100 files, the user can navigate to the next screen by clicking on the arrow found at the bottom right corner of the page. Please refer to section 5 *Searching, Filtering and Sorting Files* for detailed information on how to narrow down the list of files and take advantage of other capabilities of the portal.

Tree View




Files

My Access

All Files

Go

Actions ▾

File Type	Filename	Reporting Year	DS. Cycle	DS. Type	Doc Set	Recipient
 .zip	<a href="#">DATA_1516FIS_FR.zip</a>	2015-16	Financial Statements	District School Board	S1516FIS	Stakeholder Materials
 .zip	<a href="#">DATA_1516FIS_EN.zip</a>	2015-16	Financial Statements	District School Board	S1516FIS	Stakeholder Materials
 .zip	<a href="#">DATA_1516RES_FR.zip</a>	2015-16	Revised Estimates	District School Board	S1516RES	Stakeholder Materials

### 4.3 File information

Each file in the portal will have information attached to it in order to help users understand the content that the file contains. There are a number of fields in the portal that are used to hold this information. Depending on whether the user is viewing the file list in the “Tree View” tab or the “Files” tab the number of fields differs. The table below shows the fields that describe each file and describes what each of the fields refers to.

Field Name	Shown on Tab		Description
	Tree	Files	
File Type	x	x	The type / extension of the file (i.e. .zip, .pdf, .docx, .xlsx)
Filename	x	x	The name of the file (i.e. what will the file be named on your machine once downloaded - i.e. DATA_1516FIS_FR.zip)
Doc Set	x	x	Document Set ID in the system which is the short form combination of Document Type, Year and Cycle that the document relates to - i.e. S1718EST is a School Board document for the 2017-18 Estimates cycle)
English Description	x	x	The description of the file in English
French Description	x	x	The description of the file in French
Create Date	x	x	The date the file was uploaded to the system
Update Date	x	x	The last time the file was changed in the system (if this matches the Create Date, then there has been no changes to the file)
Reporting Year		x	The reporting year that this file is related to (i.e. 2017-18 means that the file relates to the 2017-18 school year)
DS. Cycle		x	The Doc Set cycle that this file relates to (i.e. Estimates)
DS. Type		x	The Doc Set type that this file relates to (in most cases District School Board)
Recipient		x	"The name of the recipient the file relates to (i.e. the name of the school board). Since stakeholder files are for all school boards, the recipient for these will always be "Stakeholder Materials"".
Recipient Id		x	The system ID of the recipient (i.e. B66141 or A00001)

## 5 Searching, Filtering and Sorting Files

When the user has navigated to any screen that shows a list of files, the user can utilize a number of different methods to get to the file they are looking for. This is especially useful when looking at the “Files” tab that may contain a large number of files.

### 5.1 Search

The search capabilities allow the user to narrow down the list of files by typing in a search string into the search bar and hitting “Enter” on the keyboard or clicking the “Go” button. The search is performed on the entered string and returns all files that contain that string in ANY of the fields.

View Tree By ☒ Recipient ☐ Doc Set

District School Board

- A00001 - Stakeholder Materials
  - 2018-19
    - Estimates
    - Revised Estimates
    - Financial Statements
  - 2017-18
  - 2016-17
  - 2015-16

Search:

File Type	Filename	Doc Set	English Description
.zip	<a href="#">DATA_1516FIS_FR.zip</a>	S1516FIS	Data - 2015-16 - Financial Statements - French
.zip	<a href="#">DATA_1516FIS_EN.zip</a>	S1516FIS	Data - 2015-16 - Financial Statements - English
.zip	<a href="#">DATA_1516RES_FR.zip</a>	S1516RES	Data - 2015-16 - Revised Estimates - French

For example, if a user wanted to narrow down a large number of files below to only show files relating to Revised Estimates cycles, they could search for the term “Revised”. The screen now shows the search term under the Search Bar (e.g. “Row text contains ‘Revised’”) and the screen shows all the files that have the word “Revised” in any of the fields. At the bottom right corner of the screen we can see that there are a total of 8 files that match the search term.

<input type="text" value=""/> <input type="button" value="Go"/> <input type="button" value="Actions"/>							
<input type="checkbox"/> Row text contains 'Revised' <input checked="" type="checkbox"/> <input type="button" value="X"/>							
File Type	Filename	Doc Set	English Description	French Description	Create Date	Update Date	
	<a href="#">DATA_1516RES_FR.zip</a>	S1516RES	Data - 2015-16 - Revised Estimates - French	Données - 2015-16 - Prévisions budgétaires révisées - français	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1516RES_EN.zip</a>	S1516RES	Data - 2015-16 - Revised Estimates - English	Données - 2015-16 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1819RES_FR.zip</a>	S1819RES	Data - 2018-19 - Revised Estimates - French	Données - 2018-19 - Prévisions budgétaires révisées - français	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1819RES_EN.zip</a>	S1819RES	Data - 2018-19 - Revised Estimates - English	Données - 2018-19 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1718RES_FR.zip</a>	S1718RES	Data - 2017-18 - Revised Estimates - French	Données - 2017-18 - Prévisions budgétaires révisées - français	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1718RES_EN.zip</a>	S1718RES	Data - 2017-18 - Revised Estimates - English	Données - 2017-18 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1617RES_FR.zip</a>	S1617RES	Data - 2016-17 - Revised Estimates - French	Données - 2016-17 - Prévisions budgétaires révisées - français	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1617RES_EN.zip</a>	S1617RES	Data - 2016-17 - Revised Estimates - English	Données - 2016-17 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
							1 - 8

If the user then wanted to further narrow down the search to show only files that are in English, they could type “English” into the search bar and search again. This narrows the list even further (there are now only 4 results), and both the search terms are shown under the search bar. Every time a user runs the search another term is added to the list.

<input type="text" value=""/> <input type="button" value="Go"/> <input type="button" value="Actions"/>							
<input type="checkbox"/> Row text contains 'English' <input checked="" type="checkbox"/> <input type="button" value="X"/>							
<input type="checkbox"/> Row text contains 'Revised' <input checked="" type="checkbox"/> <input type="button" value="X"/>							
File Type	Filename	Doc Set	English Description	French Description	Create Date	Update Date	
	<a href="#">DATA_1516RES_EN.zip</a>	S1516RES	Data - 2015-16 - Revised Estimates - English	Données - 2015-16 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1819RES_EN.zip</a>	S1819RES	Data - 2018-19 - Revised Estimates - English	Données - 2018-19 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1718RES_EN.zip</a>	S1718RES	Data - 2017-18 - Revised Estimates - English	Données - 2017-18 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
	<a href="#">DATA_1617RES_EN.zip</a>	S1617RES	Data - 2016-17 - Revised Estimates - English	Données - 2016-17 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19	
							1 - 4

If the user wants to widen the search again, they can either uncheck the search terms or completely delete them. For example, if the user wants to see all English documents, all they would have to do is uncheck the box next to “Row text contains ‘Revised’”, or click the red “X” next to it to remove the search term. In the case below, the user has unchecked the box, and if need be could quickly filter by the term “Revised” once again, saving them the need to re-type the term in the search box.

<input type="text"/> <input type="button" value="Go"/> <input type="button" value="Actions"/>						
<input checked="" type="checkbox"/> Row text contains 'English'						
<input type="checkbox"/> Row text contains 'Revised'						
File Type	Filename	Doc Set	English Description	French Description	Create Date	Update Date
	<a href="#">DATA_1516FIS_EN.zip</a>	S1516FIS	Data - 2015-16 - Financial Statements - English	Données - 2015-16 - États Financiers - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1516RES_EN.zip</a>	S1516RES	Data - 2015-16 - Revised Estimates - English	Données - 2015-16 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1516EST_EN.zip</a>	S1516EST	Data - 2015-16 - Estimates - English	Données - 2015-16 - Prévisions budgétaires - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1819RES_EN.zip</a>	S1819RES	Data - 2018-19 - Revised Estimates - English	Données - 2018-19 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1819EST_EN.zip</a>	S1819EST	Data - 2018-19 - Estimates - English	Données - 2018-19 - Prévisions budgétaires - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1718FIS_EN.zip</a>	S1718FIS	Data - 2017-18 - Financial Statements - English	Données - 2017-18 - États Financiers - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1718RES_EN.zip</a>	S1718RES	Data - 2017-18 - Revised Estimates - English	Données - 2017-18 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1718EST_EN.zip</a>	S1718EST	Data - 2017-18 - Estimates - English	Données - 2017-18 - Prévisions budgétaires - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1617RES_EN.zip</a>	S1617RES	Data - 2016-17 - Revised Estimates - English	Données - 2016-17 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1617EST_EN.zip</a>	S1617EST	Data - 2016-17 - Estimates - English	Données - 2016-17 - Prévisions budgétaires - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1617FIS_EN.zip</a>	S1617FIS	Data - 2016-17 - Financial Statements - English	Données - 2016-17 - États Financiers - anglais	05-FEB-19	05-FEB-19

1 - 11

Note that having a search filter on will continue even if the user navigates to other pages. For example, if the user still had the “English” term in place, and they went into a different folder, they would only see files that contained the text “English” in one of the fields.

The first screenshot shows the 'View Tree By' section with 'Recipient' selected. The file tree on the left shows 'Estimates' selected under '2018-19'. The search bar contains 'English'. The filter 'Row text contains English' is checked. The table below shows a file named 'DATA\_1819EST\_EN.zip' with an English description 'Data - 2018-19 - Estimates - English' and a French description 'Données - 2018-19 - Prévisions budgétaires - anglais'.

The second screenshot shows the same interface but with 'Revised Estimates' selected in the file tree. The search bar still contains 'English'. The filter 'Row text contains English' is checked. The table below shows a file named 'DATA\_1819RES\_EN.zip' with an English description 'Data - 2018-19 - Revised Estimates - English' and a French description 'Données - 2018-19 - Prévisions budgétaires révisées - anglais'.

## 5.2 Basic Filter

Similar to the search capabilities, the filter functionality allows the user to narrow down the list of files. However, while the search capability looks through all fields, the filter capability allows the user to be more specific by focusing on selected fields and narrowing down the terms. For example, if a user was to search for “Estimates” while looking at a list of all files, they would get files related to both Estimates and Revised Estimates cycles due to the fact that the word “Estimates” is part of both phrases.

The screenshot shows the 'Tree View' tab selected. The search bar is empty. The filter 'Row text contains Estimates' is checked. The table below shows a list of files with columns: File Type, Filename, Reporting Year, DS. Cycle, DS. Type, and Doc Set. The 'DS. Cycle' column is highlighted with a red box, showing 'Revised Estimates' and 'Estimates'.

File Type	Filename	Reporting Year	DS. Cycle	DS. Type	Doc Set
.zip	DATA_1516RES_FR.zip	2015-16	Revised Estimates	District School Board	S1516RES
.zip	DATA_1516RES_EN.zip	2015-16	Revised Estimates	District School Board	S1516RES
.zip	DATA_1516EST_FR.zip	2015-16	Estimates	District School Board	S1516EST
.zip	DATA_1516EST_EN.zip	2015-16	Estimates	District School Board	S1516EST
.zip	DATA_1819RES_FR.zip	2018-19	Revised Estimates	District School Board	S1819RES
.zip	DATA_1819RES_EN.zip	2018-19	Revised Estimates	District School Board	S1819RES



In order to make sure they are only getting files relating to the estimates cycle, the user would filter on the field “DS. Cycle” having the value of “Estimates”. A quick way to filter is by selecting from a list of available items in the drop down of a field. In the example above the user would click on the field named “DS. Cycle” which would give them a list of items to choose from. This drop down list below contains all the unique values under that field that are currently in the portal.

Tree View
















Files

My Access

All Files

Go

Actions ▾

File Type	Filename	Reporting Year	DS. Cycle	DS. Type
 .zip	<a href="#">DATA_1516FIS_FR.zip</a>	2015-16	<div> <div>     </div> <input type="text"/> </div>	ool Board
 .zip	<a href="#">DATA_1516FIS_EN.zip</a>	2015-16	<div> <div>     </div> <input type="text"/> </div>	ool Board
 .zip	<a href="#">DATA_1516RES_FR.zip</a>	2015-16	<div> <div>     </div> <input type="text"/> </div>	District School Board

Once the user clicks “Estimates” the filter is applied and the list shows only files related to the “Estimates” cycle. Note the difference between the filter applied in the search - “Row text contains ‘Estimates’” and the filter below “DS. Cycle = ‘Estimates’”.

Tree View

Files

My Access

All Files

Go

Actions ▾

DS\_Cycle = 'Estimates'
☒
☐

File Type	Filename	Reporting Year	DS. Cycle	DS. Type	Doc Set
.zip	<a href="#">DATA_1516EST_FR.zip</a>	2015-16	Estimates	District School Board	S1516EST
.zip	<a href="#">DATA_1516EST_EN.zip</a>	2015-16	Estimates	District School Board	S1516EST
.zip	<a href="#">DATA_1819EST_FR.zip</a>	2018-19	Estimates	District School Board	S1819EST
.zip	<a href="#">DATA_1819EST_EN.zip</a>	2018-19	Estimates	District School Board	S1819EST
.zip	<a href="#">DATA_1718EST_FR.zip</a>	2017-18	Estimates	District School Board	S1718EST
.zip	<a href="#">DATA_1718EST_EN.zip</a>	2017-18	Estimates	District School Board	S1718EST
.zip	<a href="#">DATA_1617EST_FR.zip</a>	2016-17	Estimates	District School Board	S1617EST
.zip	<a href="#">DATA_1617EST_EN.zip</a>	2016-17	Estimates	District School Board	S1617EST

The user can further narrow down the list by applying additional filters. One of the very useful filters is the date filter. For example, if the user wants to see only the Estimates files that were uploaded in the past week, they can quickly filter on the “Create Date” column and select “Last Week” from the drop down list.

Create Date

Update Date

Last 5 Years

Last 2 Years

Last Year

Last Month

Last Week

Tree View

Files

My Access

All Files

☒


☒

File Type	Filename	Reporting Year	DS. Cycle	DS. Type	Doc Set
	<a href="#">DATA_1516EST_FR.zip</a>	2015-16	Estimates	District School Board	S1516EST

### 5.3 Advanced Filter

The portal allows for more advanced filtering as well. The advanced filters can be applied by going to Actions > Filter

The screenshot shows the top navigation bar with 'Tree View', 'Files', and 'My Access' tabs. Below the navigation bar is a search bar with a 'Go' button and an 'Actions' dropdown menu. The 'Filter' option is highlighted in the dropdown menu. Below the search bar is a table with columns: File Type, Filename, and Reporting Year.

This gives the user the ability to filter on any of the columns using more advanced techniques. One example is filtering for files that were uploaded during a certain time. For example, if the user wanted to see all files that were uploaded in February of 2019, they could filter based on the Create Date between February 1<sup>st</sup> and February 28<sup>th</sup> 2019.

The 'Filter' dialog box is shown with 'Filter Type' set to 'Column'. The 'Column' dropdown is set to 'Create Date', the 'Operator' dropdown is set to 'between', and the 'Expression' field is set to '01-Feb-19' and '28-Feb-19'. The 'Apply' button is highlighted.





The expression would be shown under the search bar and the results filtered accordingly.

The screenshot shows the search bar with the filter expression 'Create Date between 01-FEB-19 and 28-FEB-19' applied. Below the search bar is a table with columns: File Type, Filename, Reporting Year, DS. Cycle, DS. Type, and Doc Set.

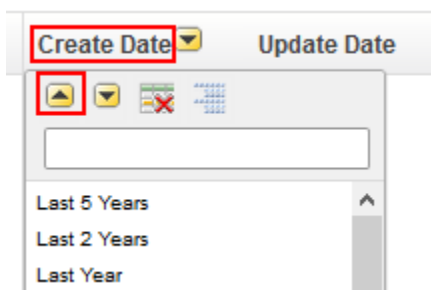
File Type	Filename	Reporting Year	DS. Cycle	DS. Type	Doc Set
	<a href="#">DATA_1516FIS_FR.zip</a>	2015-16	Financial Statements	District School Board	S1516FIS
	<a href="#">DATA_1516FIS_EN.zip</a>	2015-16	Financial Statements	District School Board	S1516FIS
	<a href="#">DATA_1516RES_FR.zip</a>	2015-16	Revised Estimates	District School Board	S1516RES
	<a href="#">DATA_1516RES_EN.zip</a>	2015-16	Revised Estimates	District School Board	S1516RES

## 5.4 Sort



By default, the files are sorted by Create Date (newest files on top) with the newest 100 files being shown on the first page. A yellow arrow next to the “Create Date” field shows that this is the field currently being sorted by, and the arrow pointing downwards means that it is sorting in a descending order (newest to oldest).

File Type	Filename	Reporting Year	DS. Cycle	DS. Type	Doc Set	Recipient	Recipient Id	English Description	French Description	Create Date	Update Date
	<a href="#">DATA_1516FIS_FR.zip</a>	2015-16	Financial Statements	District School Board	S1516FIS	Stakeholder Materials	A00001	Data - 2015-16 - Financial Statements - French	Données - 2015-16 - États Financiers - français	05-FEB-19	05-FEB-19
	<a href="#">DATA_1516FIS_EN.zip</a>	2015-16	Financial Statements	District School Board	S1516FIS	Stakeholder Materials	A00001	Data - 2015-16 - Financial Statements - English	Données - 2015-16 - États Financiers - anglais	05-FEB-19	05-FEB-19
	<a href="#">DATA_1516RES_FR.zip</a>	2015-16	Revised Estimates	District School Board	S1516RES	Stakeholder Materials	A00001	Data - 2015-16 - Revised Estimates - French	Données - 2015-16 - Prévisions budgétaires révisées - français	05-FEB-19	05-FEB-19
	<a href="#">DATA_1516RES_EN.zip</a>	2015-16	Revised Estimates	District School Board	S1516RES	Stakeholder Materials	A00001	Data - 2015-16 - Revised Estimates - English	Données - 2015-16 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19






If the user wants to change the sort order, for example sort by “Create Date” ascending (oldest to newest), the user can click on the title of the field and click on the yellow arrow pointing up. The screen now shows the files with the oldest files on top.



To sort by another field, the user would simply click the title of the other field and click one of the two yellow arrows from the popup.






File Type	Filename	Reporting Year	DS. Cycle	DS. Type
	<a href="#">DATA_1617FIS_EN.zip</a>			District School Board
	<a href="#">DATA_1617FIS_FR.zip</a>			District School Board

In the example above, the sorting is now being done on the “Reporting Year” field descending, with the newest reporting year files shown at the top. The yellow arrow has now moved from the “Create Date” field to the “Reporting Year” field to indicate this.

All Files											
<div> <div>Tree View</div> <div>Files</div> <div>My Access</div> </div>											
<div> <div>Q*</div> <div>Go</div> <div>Actions ▾</div> </div>											
File Type	Filename	Reporting Year 	D.S. Cycle	DS. Type	Doc Set	Recipient	Recipient Id	English Description	French Description	Create Date	Update Date
 .zip	<a href="#">DATA_1819EST_EN.zip</a>	2018-19	Estimates	District School Board	S1819EST	Stakeholder Materials	A00001	Data - 2018-19 - Estimates - English	Données - 2018-19 - Prévisions budgétaires - anglais	05-FEB-19	05-FEB-19
 .zip	<a href="#">DATA_1819EST_FR.zip</a>	2018-19	Estimates	District School Board	S1819EST	Stakeholder Materials	A00001	Data - 2018-19 - Estimates - French	Données - 2018-19 - Prévisions budgétaires - français	05-FEB-19	05-FEB-19
 .zip	<a href="#">DATA_1819RES_EN.zip</a>	2018-19	Revised Estimates	District School Board	S1819RES	Stakeholder Materials	A00001	Data - 2018-19 - Revised Estimates - English	Données - 2018-19 - Prévisions budgétaires révisées - anglais	05-FEB-19	05-FEB-19
 .zip	<a href="#">DATA_1819RES_FR.zip</a>	2018-19	Revised Estimates	District School Board	S1819RES	Stakeholder Materials	A00001	Data - 2018-19 - Revised Estimates - French	Données - 2018-19 - Prévisions budgétaires révisées - français	05-FEB-19	05-FEB-19

## 5.5 Rows per Page

By default the screen will show 100 rows (files) per page. This can be changed by going to Actions > Rows Per Page and selecting a different number.

<div> <div>Q*</div> <div>Go</div> <div>Actions ▾</div> </div>											
File Type	Filename	Reporting Year									
 .zip	<a href="#">DATA_1516FIS_FR.zip</a>	2015-16									
 .zip	<a href="#">DATA_1516FIS_EN.zip</a>	2015-16									
 .zip	<a href="#">DATA_1516RES_FR.zip</a>	2015-16									
 .zip	<a href="#">DATA_1516RES_EN.zip</a>	2015-16									
 .zip	<a href="#">DATA_1516EST_FR.zip</a>	2015-16									

Select Columns

Filter

Rows Per Page ▾

Format ▾

Flashback

Save Report

Reset

Help

Download

1

5

10

15

20

25

50

100

1000

All

25

## 6 Downloading Files

Once the user has found the files that they want to download they can download it by simply clicking on the file name link, found in the “Filename” field. Please note that the portal only allows for the downloading of one file at a time. In general, if a dataset contains a large number of files (such as stakeholder data) the files will be packaged into a zip file (this is easy to tell by looking at the “File Type” field which will indicate “.zip”). In order to see how large a file is before downloading it, the user can hover their mouse over the file name. In the example below the file named “DATA\_1617FIS\_EN.zip” is 425MB in size.

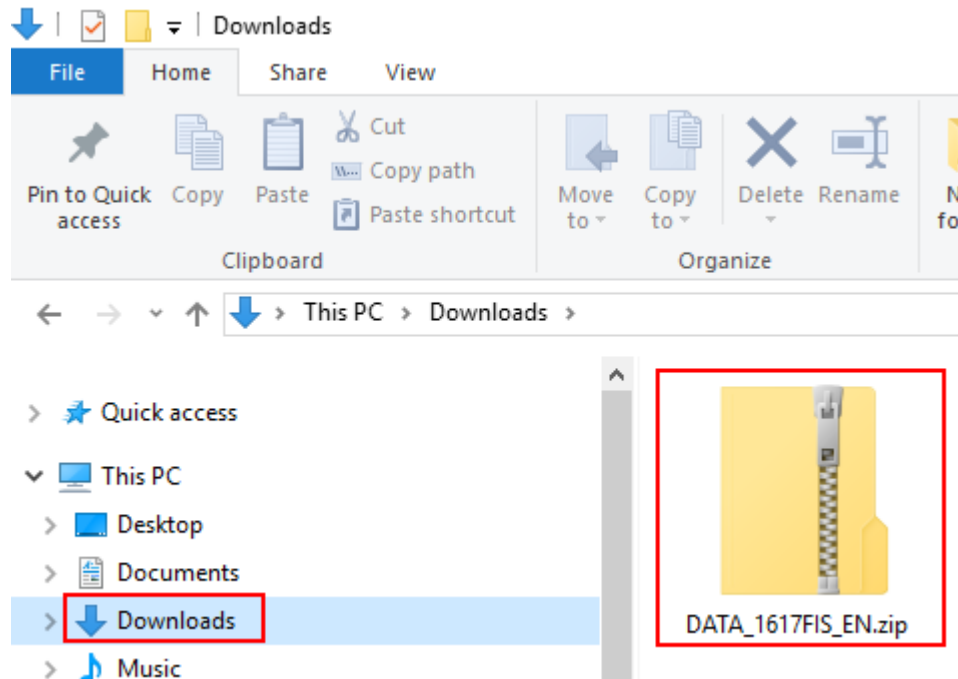
The screenshot shows the EFIS File Download Portal interface. On the left is a tree view showing the hierarchy: District School Board > A00001 - Stakeholder Materials > 2018-19 > 2017-18 > Estimates > Revised Estimates > Financial Statements > 2016-17 > Estimates. The main table has columns: File Type, Filename, and English Description. The file 'DATA\_1617FIS\_EN.zip' is highlighted, and a tooltip shows its size as 425MB.

File Type	Filename	English Description
.zip	<a href="#">DATA_1617FIS_FR.zip</a>	Data - 2016-17 - Financial Statements - French
.zip	<a href="#">DATA_1617FIS_EN.zip</a>	Data - 2016-17 - Financial Statements - English

As mentioned, clicking the file name link (e.g. DATA\_1617FIS\_EN.zip) will start the download process of the file. Depending on which browser the user is using as well as their browser settings they will have a slightly different experience. For most browsers, the browser will most likely prompt the user as to where they want to save the file, where the Downloads folder on their desktop is the most likely place the file will be saved. For example, in the Firefox browser the user has the option to “Save” or to “Open with”.

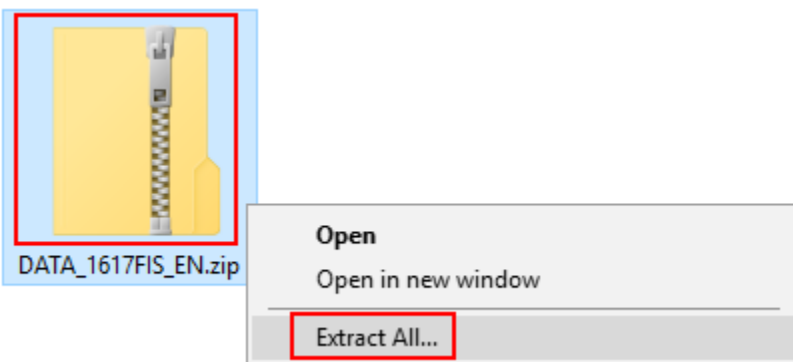
The screenshot shows the EFIS File Download Portal interface with a Firefox download dialog box open. The dialog box title is 'Opening DATA\_1617FIS\_EN.zip'. It shows the file name 'DATA\_1617FIS\_EN.zip' and its size '425MB'. The dialog box asks 'What should Firefox do with this file?' and provides options: 'Open with Windows Explorer (default)', 'Save File' (selected), and 'Do this automatically for files like this from now on.' The 'OK' button is highlighted.

Selecting “Save” would place the file in the user’s Downloads folder.



## 6.1 Opening Zip Files

As mentioned before, Zip files are used to create collections of data into one single file. Computers using the Windows operating system should all have a built-in utility to work with .zip files. The user can contact their IT department in the case that they are not using Windows or do not see a zip utility. In order to open files found within zip files, the user can simply double-click on the Zip file in the place where it is downloaded, and copy the necessary files out. Another option is to right-click the Zip file and select “Extract All” (on Windows computers). This will create a new folder which contains all the contents of the Zip file.



## 6.2 Actions > Download

Please note that clicking the “Actions” button and selecting “Download” will **NOT** download any files. This will only download the list of files that the screen is showing at that time.

The screenshot shows the EFIS File Download Portal interface. At the top, there are tabs for 'Tree View', 'Files', and 'My Access'. Below these, there's a 'Reports' section. On the left, there's a 'View Tree By' section with radio buttons for 'Recipient' (selected) and 'Doc Set'. Below this is a tree view showing the hierarchy of reports, including 'District School Board', 'A00001 - Stakeholder Materials', '2018-19', '2017-18', 'Estimates', 'Revised Estimates', 'Financial Statements', '2016-17', 'Estimates', 'Revised Estimates', 'Financial Statements', and '2015-16'. The '2016-17 Financial Statements' item is selected. In the center, there's a search bar with a 'Go' button and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: 'Select Columns', 'Filter', 'Rows Per Page', 'Format', 'Flashback', 'Save Report', 'Reset', 'Help', and 'Download' (highlighted in blue). Below the 'Actions' menu, there's a table with columns: 'File Type', 'Filename', 'English Description', 'French Description', 'Create Date', and 'Update Date'. The table contains two rows of data for 'DATA\_1617FIS\_FR.zip' and 'DATA\_1617FIS\_EN.zip'. At the bottom right, there's a 'Download' button.

File Type	Filename	English Description	French Description	Create Date	Update Date
.zip	DATA_1617FIS_FR.zip	Data - 2016-17 - Financial Statements - French	- 2016-17 - États Financiers - français	05-FEB-19	05-FEB-19
.zip	DATA_1617FIS_EN.zip	Data - 2016-17 - Financial Statements - English	- 2016-17 - États Financiers - anglais	05-FEB-19	05-FEB-19

