



Ministry of Education

EFIS 2.0 - User Set Up Guide

Version 1.9

August 22, 2016

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2 Document History

Document History			
Version	Date	Changed by	Description of changes
1.0	Nov 27, 2014	EFIS Team	Initial Release
1.1	Dec 11, 2014	EFIS Team	Added 'and Training' to URL description "NOTE: For UAT and Training user's only, use this URL:"
1.2	Dec 17, 2014	EFIS Team	Removed "NOTE: For UAT and Training user's only, use this URL:" from pages 15, 25 and 34
1.3	Feb 11, 2015	EFIS Team	Removed reference to 'Child Care' / 'Board User' to make a generic Setup Guide
1.5	Jul 15, 2016	EFIS Team	Updated System Requirements, Browsers and Smart View Setup
1.6	Aug 07, 2016	EFIS Team	Removed reference to Calculation Manager and other updates based on feedback
1.7	Aug 18, 2016	EFIS Team	Removed reference to Calculation Manager and other updates based on feedback
1.9	Aug 22, 2016	EFIS Team	Fixed the URL for Firefox Portable

3 Description and System Requirements

3.1 Description

The following information describes the setup and configuration requirements that need to be made to the end user workstation in order to use the Planning application for EFIS 2.0 correctly.

In this 'User Setup Guide' you will find the detailed step-by-step instructions and location of software needed:

- to setup and configure a supported browser (either Internet Explorer 9 + or Firefox 47.01)
- to setup and configure the Smart View (Microsoft Excel Plug-In) software on the end user workstation.

3.2 User System Requirements

User System Requirements		
Client OS	Browsers	Exceptions and Additional Info
Windows 7 (all SP levels included)	Internet Explorer 9.x, Internet Explorer 10.x, Internet Explorer 11.x, Firefox 47.0.1	Preferred version for Firefox is Firefox 47.0.1
Windows 8	Internet Explorer 10.x, Firefox 47.0.1	Preferred version for Firefox is Firefox 47.0.1
Windows 8.1	Internet Explorer 10.x, Firefox 47.0.1	Preferred version for Firefox is Firefox 47.0.1
Windows 10	Internet Explorer 11.x, Firefox 47.0.1	Preferred version for Firefox is Firefox 47.0.1
Windows Server 2012 (all SP levels included)/R2	Internet Explorer 10.x, Internet Explorer 11.x, Firefox 47.0.1	Preferred version for Firefox is Firefox 47.0.1
Apple Max OS X Release 10.6.x	Firefox 47.0.1	Preferred version for Firefox is Firefox 47.0.1 EXCEPTION: For Web browser clients only.

Client Third Party Software		
Vendor	Version	Exceptions and Additional Info
Microsoft	Office 2007 (all SP levels included) Office 2010 (all SP levels included) Office 2013 (all SP levels included) Office 2016	1. Certification Types: Office Productivity Suite 2. For Offline Planning: MS Excel and Offline Planning must be installed on the same machine. 3. Office 365 editions require locally installed supported versions of Office applications. See https://support.oracle.com/epmos/faces/DocumentDisplay?id=1581197.1 .
Adobe	Acrobat Reader 9+	Microsoft .Net Framework 4.5 required for Smart View.
Adobe	Flash Player 10+	
Oracle	Smart View (v 11.1.2.5.520)	

1. **Chrome and Safari are not yet supported and should not be used.*

4 Firefox setup

4.1 Recommended Version

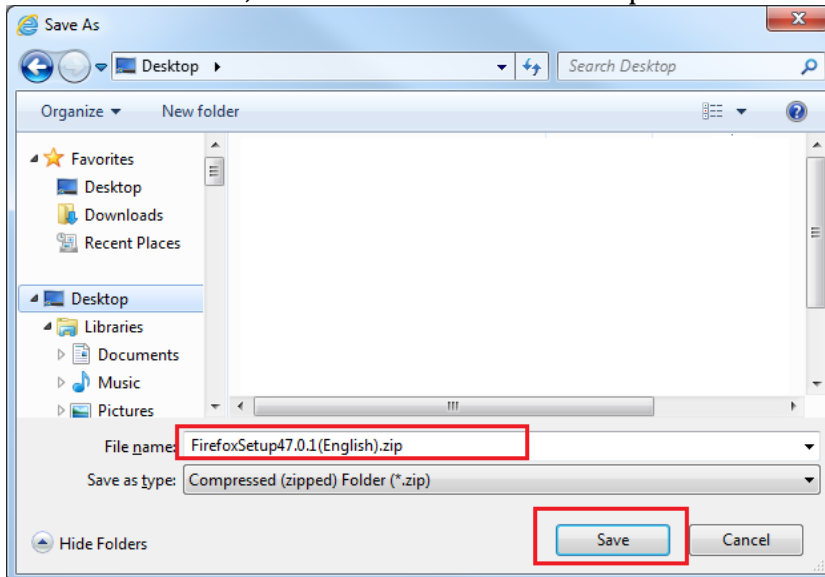
Firefox v47.0.1 regular is the recommend version for use with Oracle Hyperion Planning.

4.2 Download File

The file can be downloaded from this URL:

[https://efis.fma.csc.gov.on.ca/Firefox/FirefoxSetup47.0.1\(English\).zip](https://efis.fma.csc.gov.on.ca/Firefox/FirefoxSetup47.0.1(English).zip)

Click on “Save as”, to save related Firefox setup file to the folder of your choice.




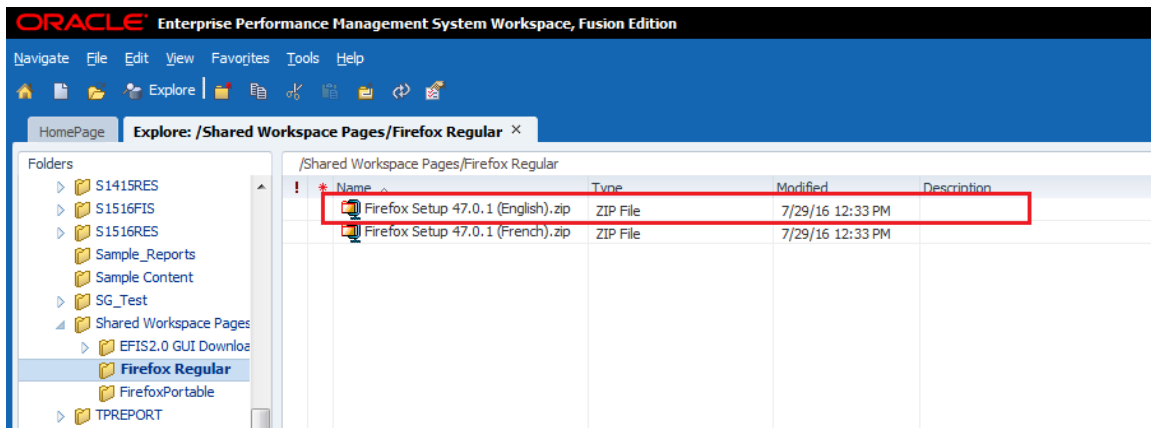
URL for Firefox (French version) is:

[https://efis.fma.csc.gov.on.ca/Firefox/FirefoxSetup47.0.1\(French\).zip](https://efis.fma.csc.gov.on.ca/Firefox/FirefoxSetup47.0.1(French).zip)

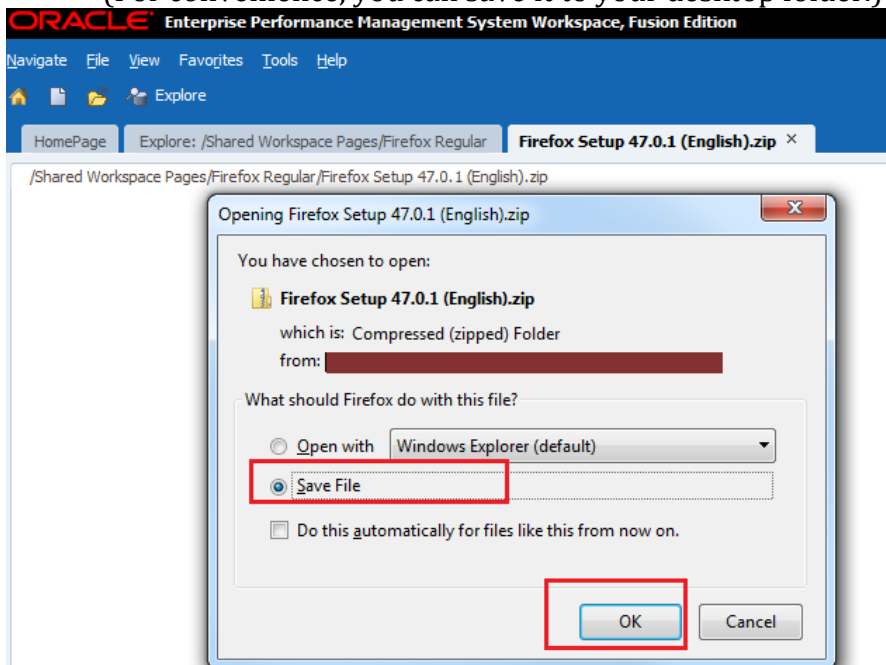
4.3 Download from Workspace

The file can also be downloaded from Explore at Hyperion Workspace:

- Log into Hyperion Workspace.
- Click on  icon from top ribbon.
- Click on “Firefox Regular” folder in “Shared Workspace Pages” folder from left pane. You will find two Firefox installation (zipped) files - each of English / French versions in right pane.



- Right click on your choice of Firefox Setup 47.0.1 (**).zip file and select **Open**. It will open a new tab and a popup to download file.
- Select “Save File” and then click on OK to download Firefox install (zip) file.
(For convenience, you can save it to your desktop folder.)

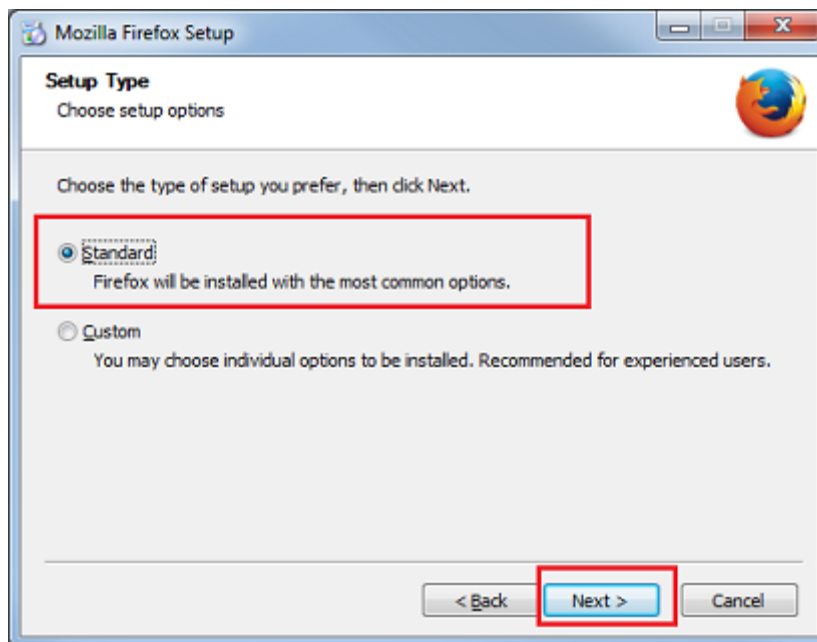


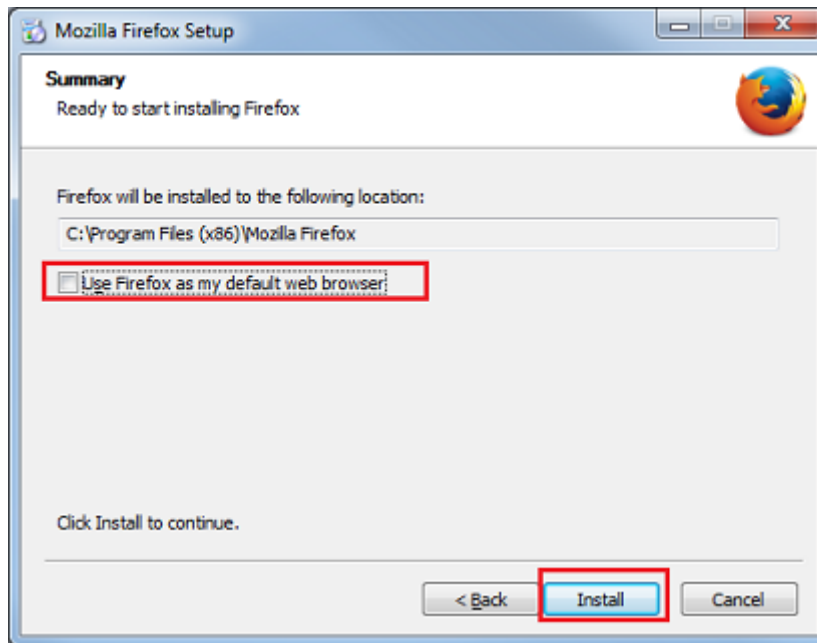
- Unzip the file in order to prepare it for installation.

4.4 Install Firefox

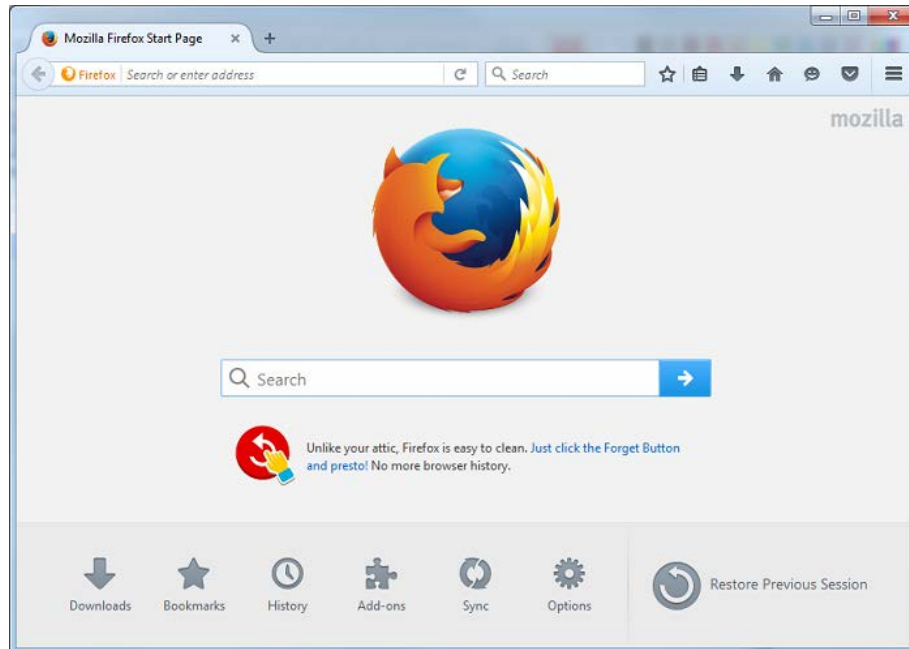
Once Firefox install files are downloaded (and unzipped), you will need to install Firefox. (You may need to have Administrator rights to install Firefox. Please contact your local IT support desk to provide the Administrator access.)

Double click on Firefox install (exe) file.



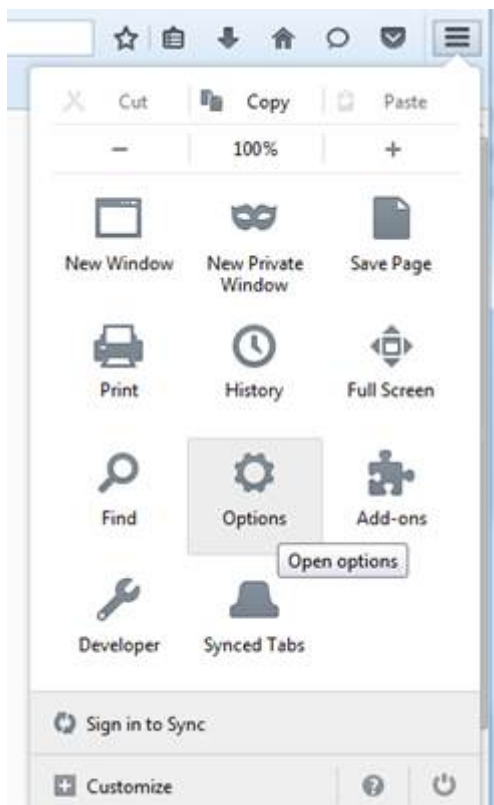


- After Firefox has finished installation, open Firefox if it has not launched automatically

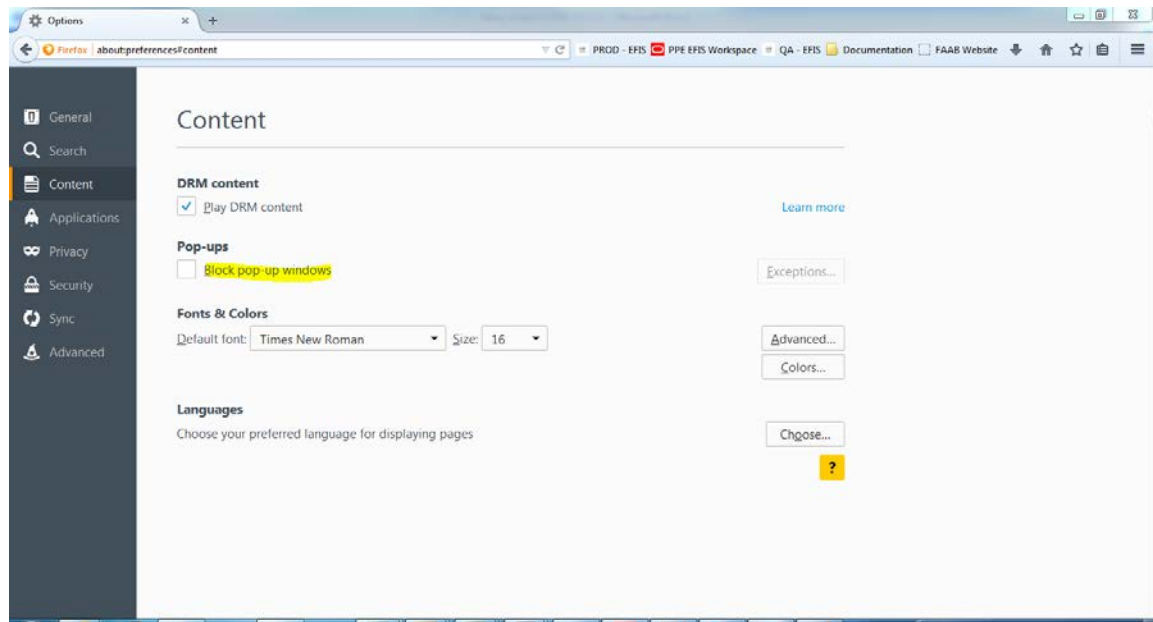


4.5 Allow pop-up windows

- Click on "Open Menu"
- Select "Options"



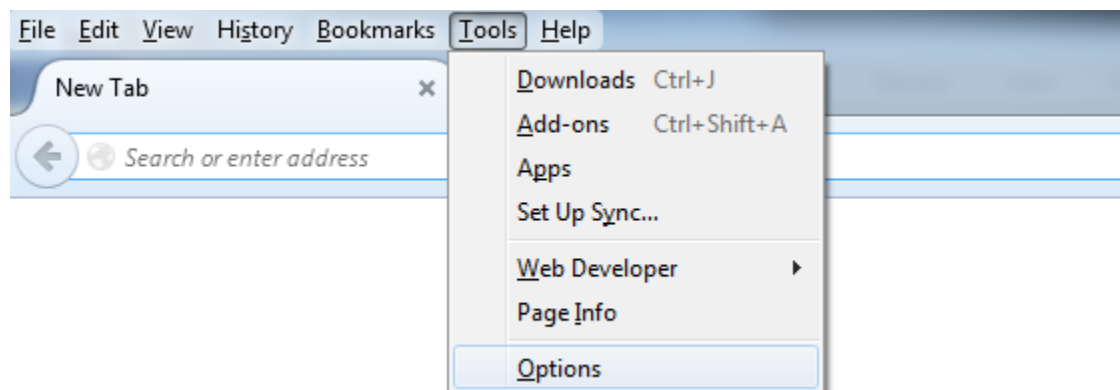
- Click on "Content" tab on the left Panel
- Uncheck "Block pop-up windows"



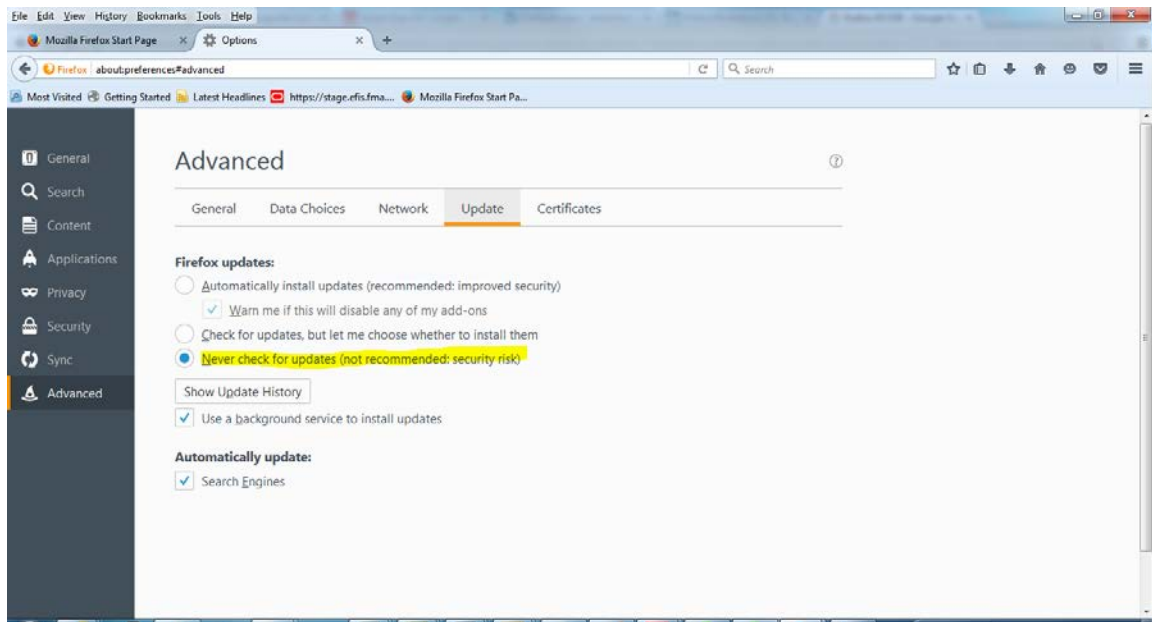
4.6 Block Firefox Update and Requests

Firefox Menu Bar

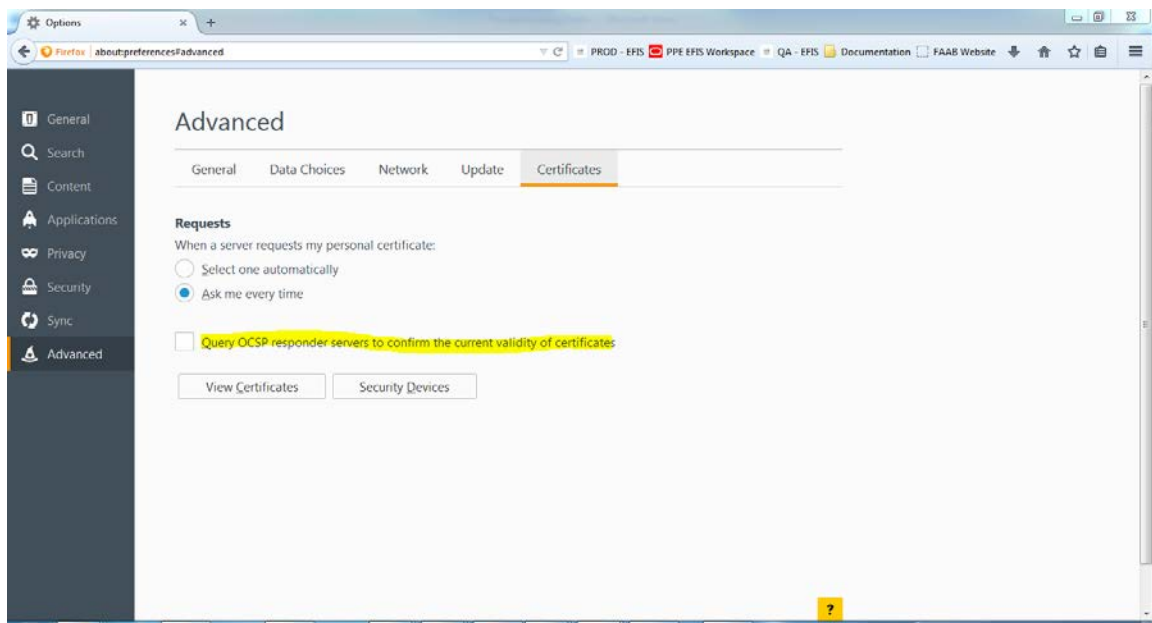
- Click on "Tools" -> "Options"



- Click on "Advanced" tab on the left Panel
- Under "Update" on the top
 - Select "Never check for updates..."



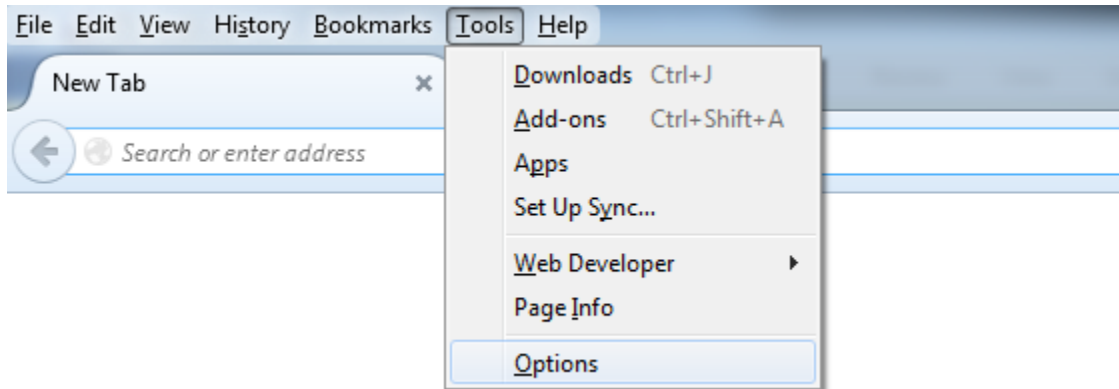
- Under “Certificates” on the top
 - Uncheck “Query OCSP responder servers to confirm the current validity of certificates”



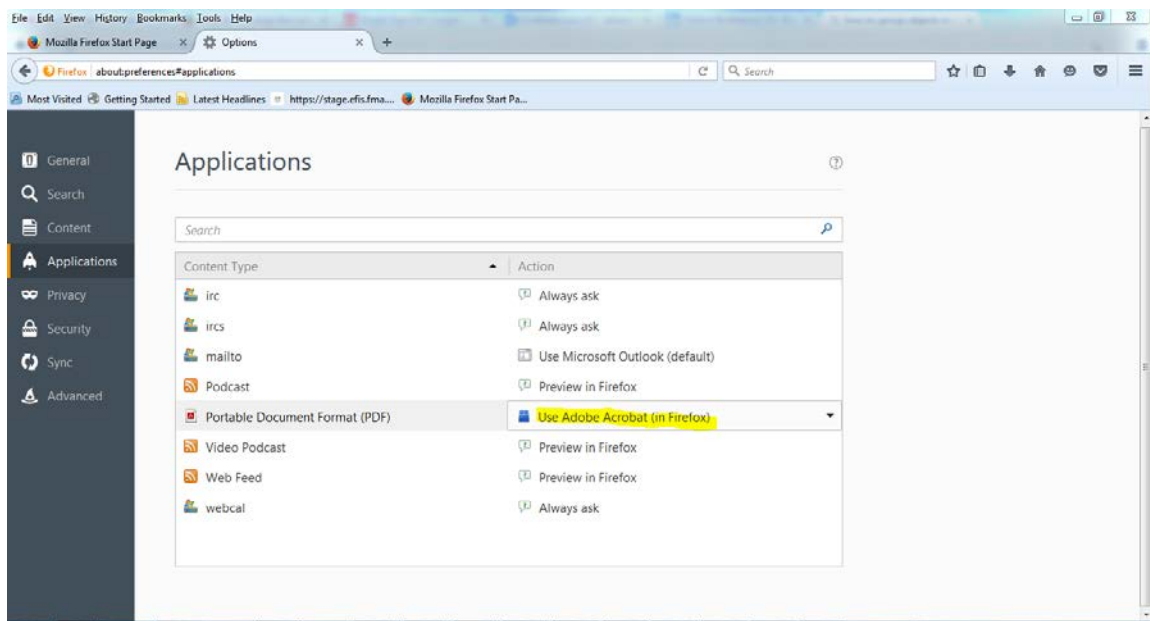
4.7 Adobe settings in Firefox

Firefox Menu Bar

- Click on “Tools”->”Options”



- Click on “Applications” tab on the left Panel
- Make sure that everything under the Adobe Acrobat has “Use Adobe Acrobat (in Firefox)”



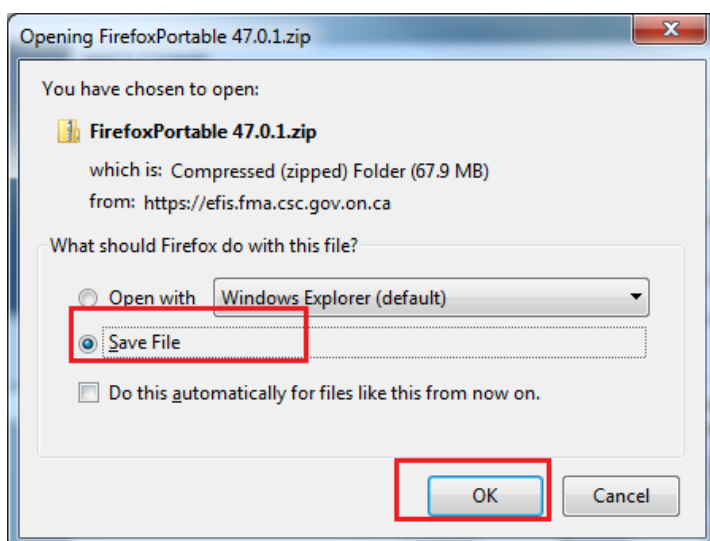
5 Firefox portable setup

5.1 Recommended Version

Firefox Portable v47 is the recommend version for use with Oracle Hyperion Planning.


5.2 Download File

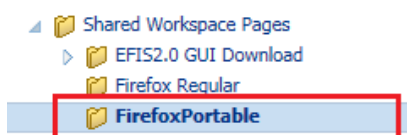
English version of Firefox Setup file can be downloaded from this URL:
[https://efis.fma.csc.gov.on.ca/Firefox/FirefoxPortable47.0.1\(English\).zip](https://efis.fma.csc.gov.on.ca/Firefox/FirefoxPortable47.0.1(English).zip)



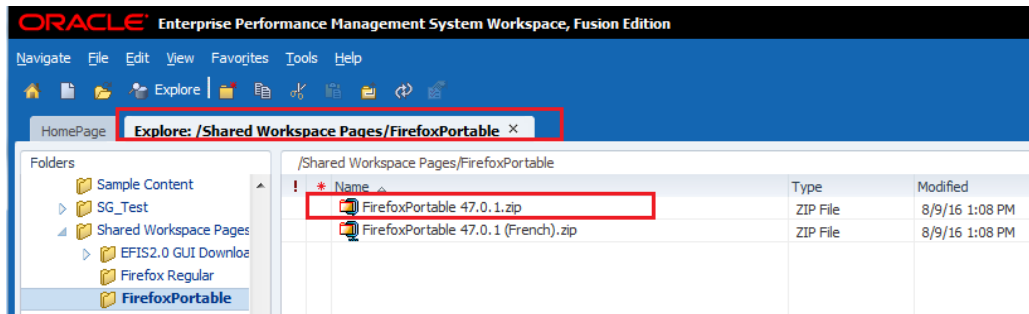
French version of Firefox Setup file can be downloaded from this URL:
[https://efis.fma.csc.gov.on.ca/Firefox/FirefoxPortable47.0.1\(French\).zip](https://efis.fma.csc.gov.on.ca/Firefox/FirefoxPortable47.0.1(French).zip)

You can also find Firefox portable (English/French) files in Explore at Hyperion Workspace:

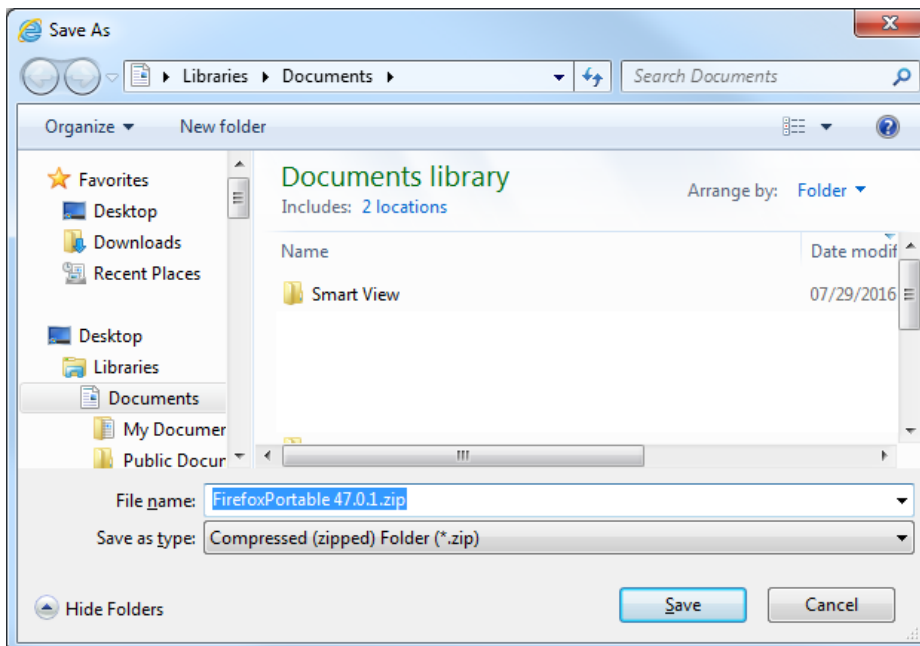
- Log into Hyperion Workspace
- Click on “Explore”  from menu on top
- On left pane, Go to “Shared Workspace Pages”.
- Select “FirefoxPortable” folder



- Select related “FirefoxPortable 47.0.1 (***)”.zip on the right pane



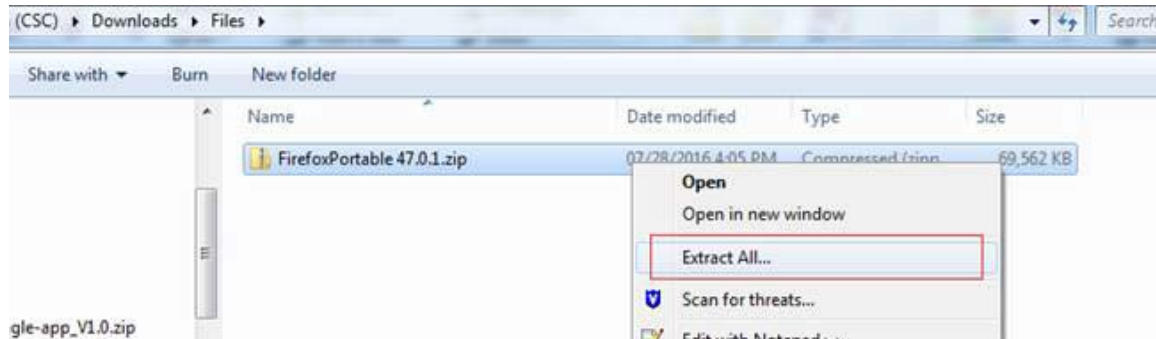
- Right click on file and select “Open”.
- File will open in new tab and popup will appear to open or Save the file. Select “Save as” and save it (in a place of your choice)



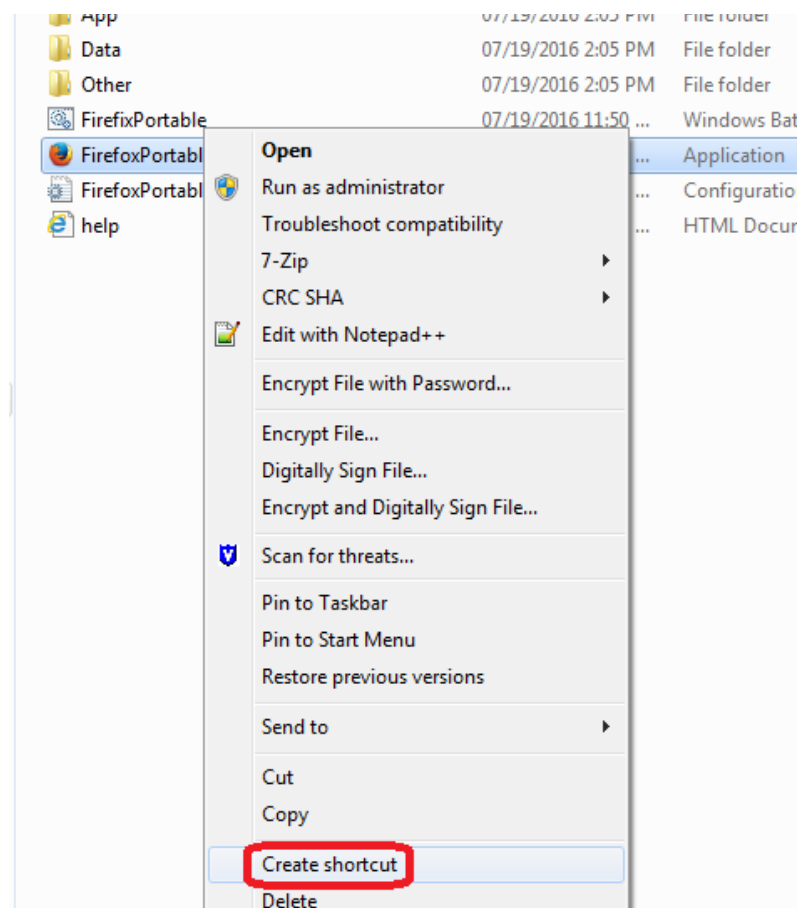
5.3 Install Firefox

After download the file to your computer

- Right click on the file->Extract All



- Double click the folder FirefoxPortable 47.0.1-> FirefoxPortable
- Right click on the FirefoxPortable.exe file->"Create shortcut"



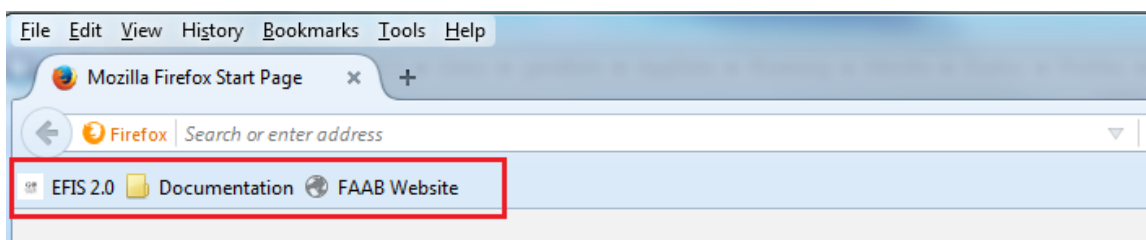
- Move it to your desktop for easy access

5.4 Accessing EFIS 2.0

- Click on the Shortcut to open the browser

Once the browser opens it should look like the screen-shot below. Note the following:

1. The home page is set to access EFIS 2.0, so once the browser it open, it should go to the login page. User can also access EFIS 2.0 using the EFIS 2.0 Link
2. The documentation folder contains links to EFIS 2.0 documents on the FAAB website. The three useful links here are:
 - a. Setup Guide – on how each user machine and browser should be configured
 - b. Troubleshooting guide – to help with common issues a user might experience in EFIS 2.0
 - c. User Guide – a guide on how to use EFIS 2.0



Please note: If you already have another version of Firefox installed on your machine, please make sure that you are always opening this version for the purposes of EFIS 2.0. This browser has all the necessary settings to run EFIS 2.0. If you wish to set up another browser, please see the Setup Guide. Also note, if you have another instance of Firefox open on your machine, and you follow the shortcut to the EFIS 2.0 version of the browser, the browser which is already open will be launched. The best way to know that you are in the EFIS 2.0 browser is by looking at the links (bookmarks) next to the address bar.

6 Internet Explorer setup

6.1 Recommended Version

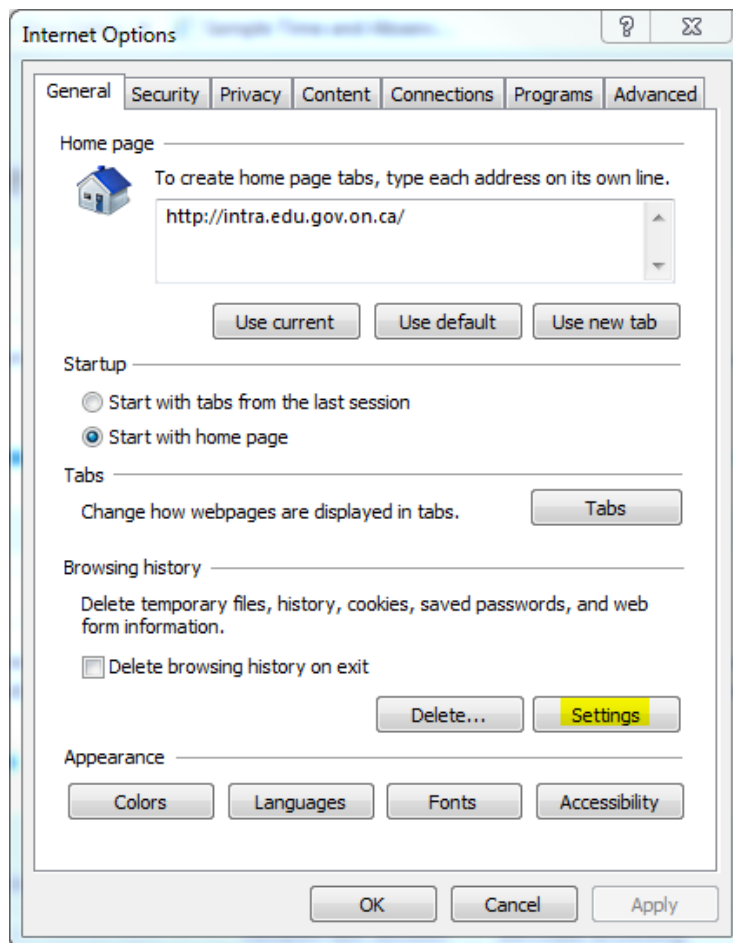
Internet Explorer 9, 10 and 11 are the recommend versions for use with Oracle Hyperion Planning.

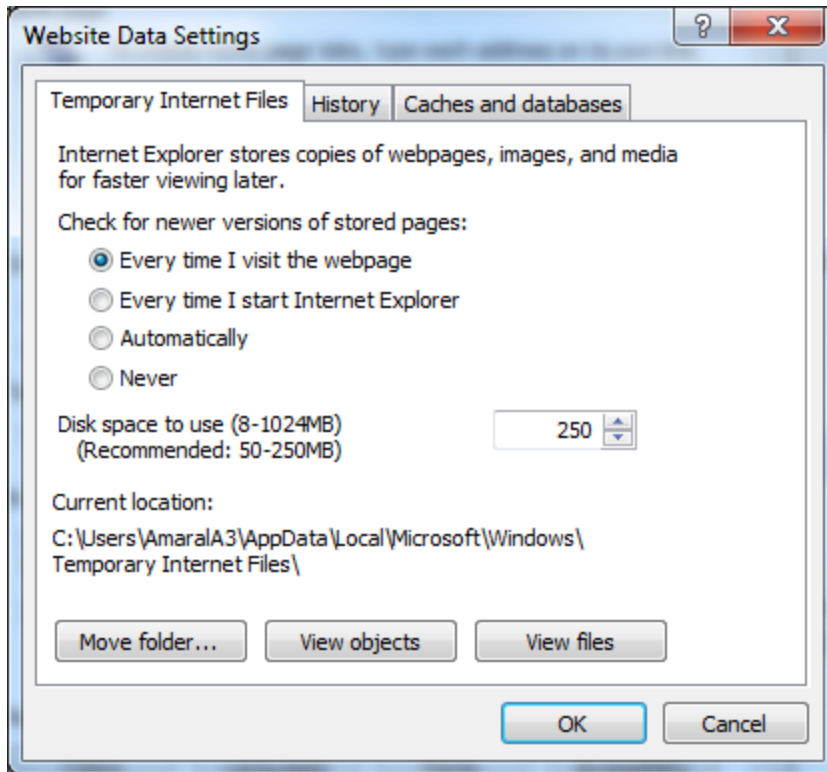
6.2 IE Setup

Specific IE settings are recommended by Oracle for the Hyperion products.

6.2.1 “General” settings

- Open Internet Explorer
- Go to “Tools”->“Internet options”-> “General” tab
- In “Browsing history” section click on “Settings” button
- Select “Every time I visit the webpage” option

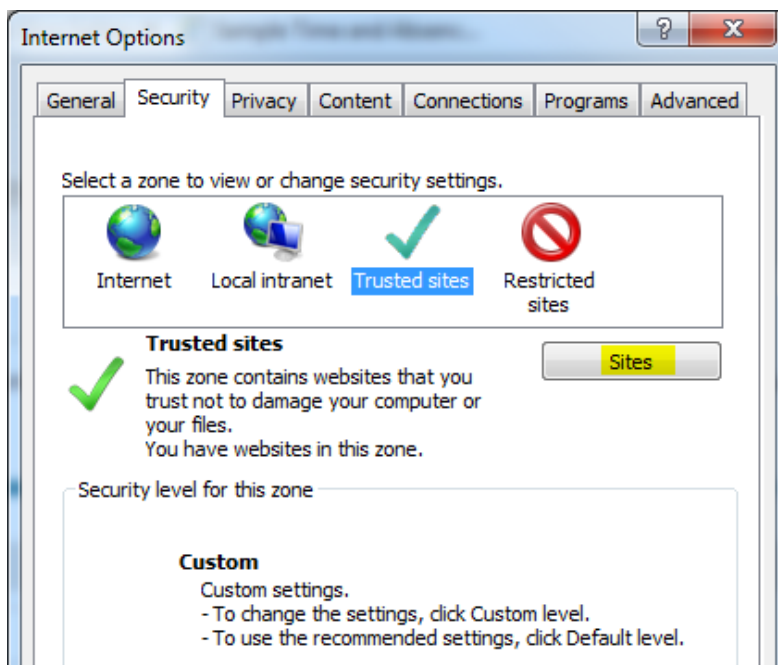




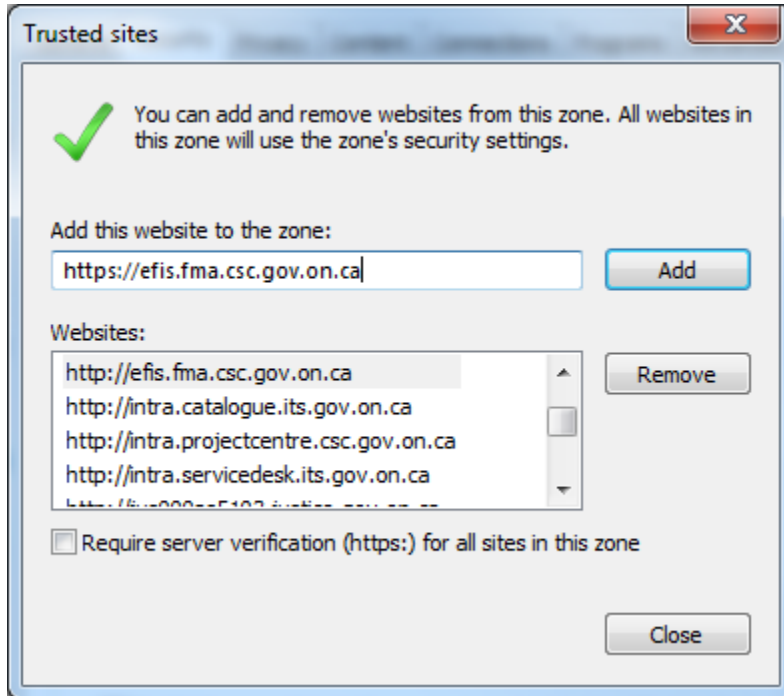
- Click “OK”->”Apply”

6.2.2 “Security” settings

- Select “Trusted sites” from “Select a zone to view or change security settings” section
- Click on “Sites” button

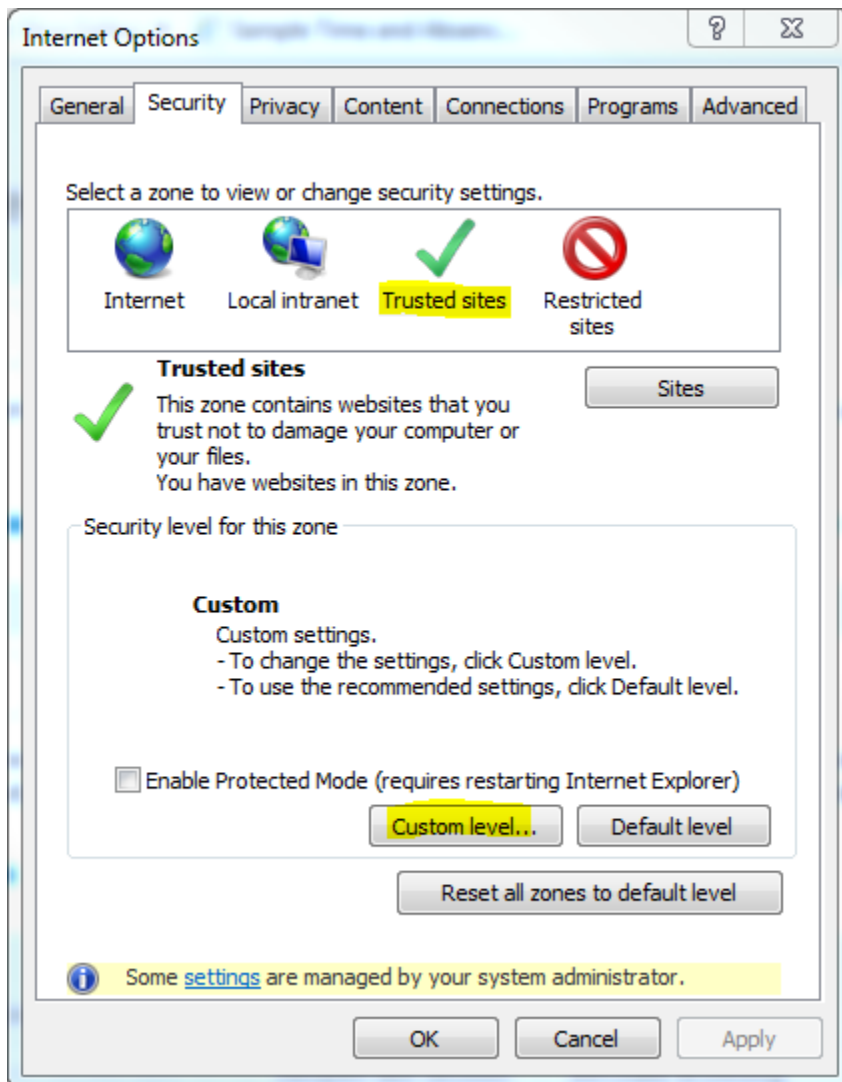


- In “Add this website to the zone:”, enter the following URL:
<https://efis.fma.csc.gov.on.ca>
- Uncheck “Require server verification (https:) for all sites in this zone
- Click “Add”

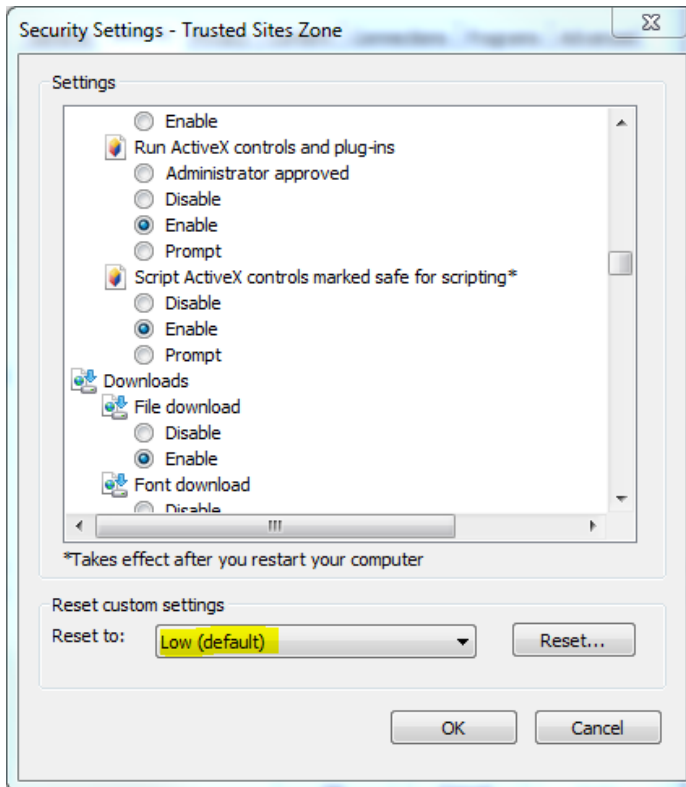


- Repeat for the following URLs
 - <https://www.iam.security.gov.on.ca>
 - *.gov.on.ca
 - http://*.gov.on.ca
 - https://*.gov.on.ca
- Click “Close”->”Apply”

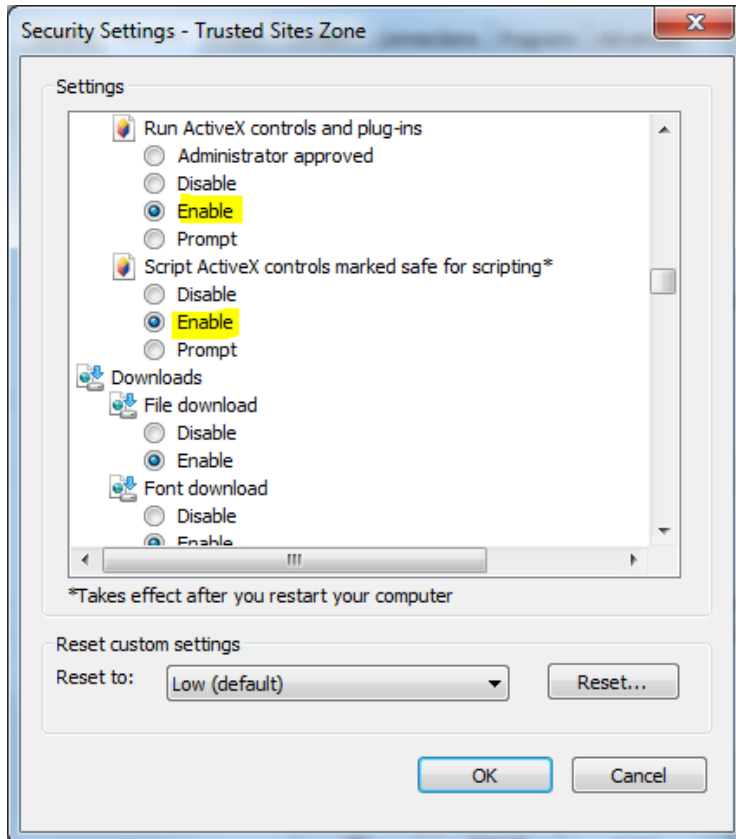
- Select “Trusted sites”
- Click on “Custom level” button



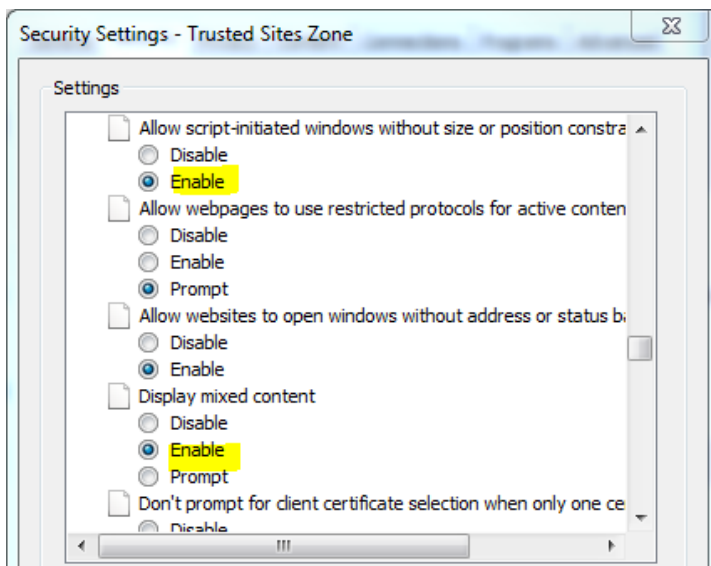
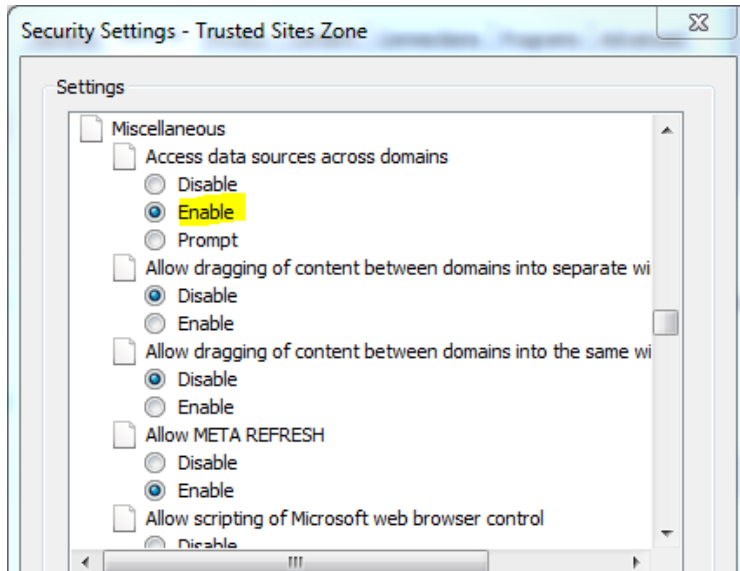
- In the “Reset custom settings” section, from “Reset to:” list
 - Select “Low”



- In the “Settings” section
 - under “ActiveX controls and plug-ins”
 - Enable “Run ActiveX controls and plug-ins”
 - Enable “Script ActiveX controls marked safe for scripting”



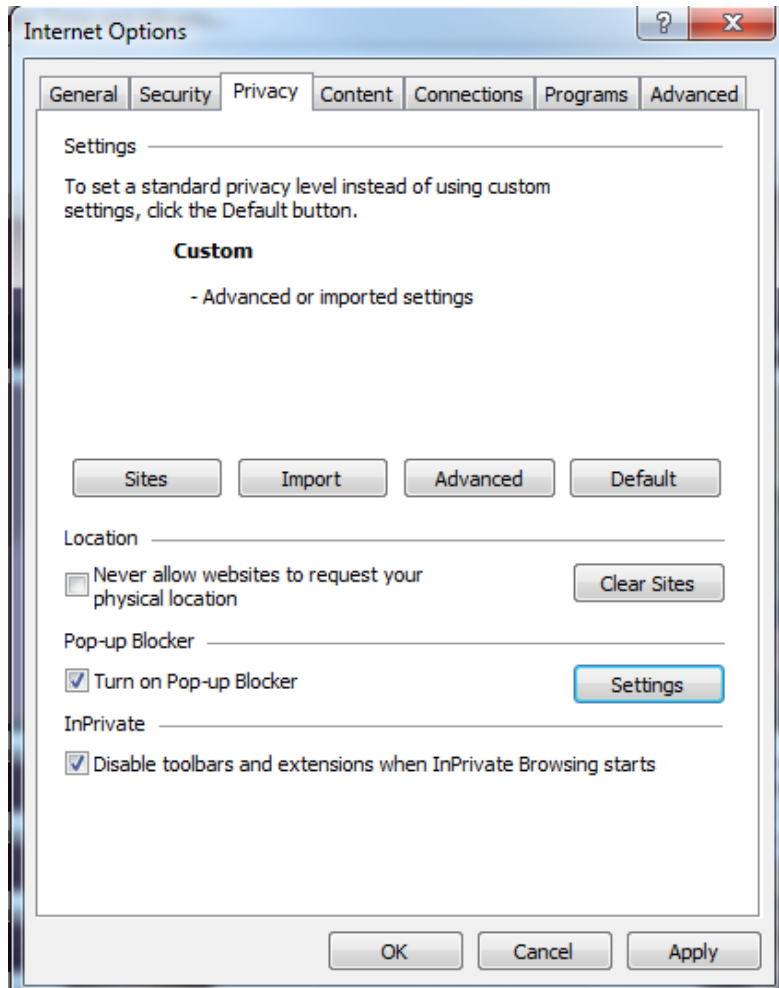
- Under “Miscellaneous”
 - Enable “Access data sources across domains”
 - Enable “Allow script-initiated windows without size or position constraints”
 - Enable “Display mixed content”

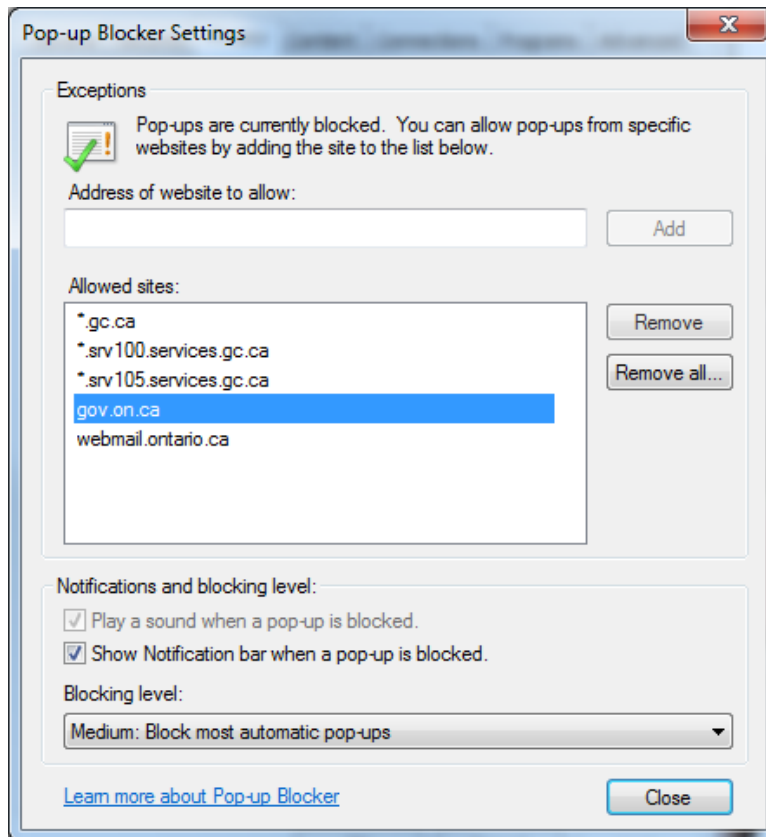


- Click “OK”-> “Apply”

6.2.3 “Privacy” settings

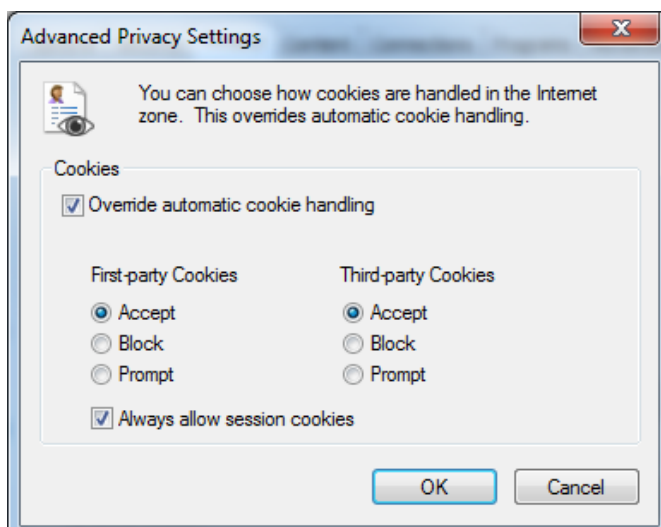
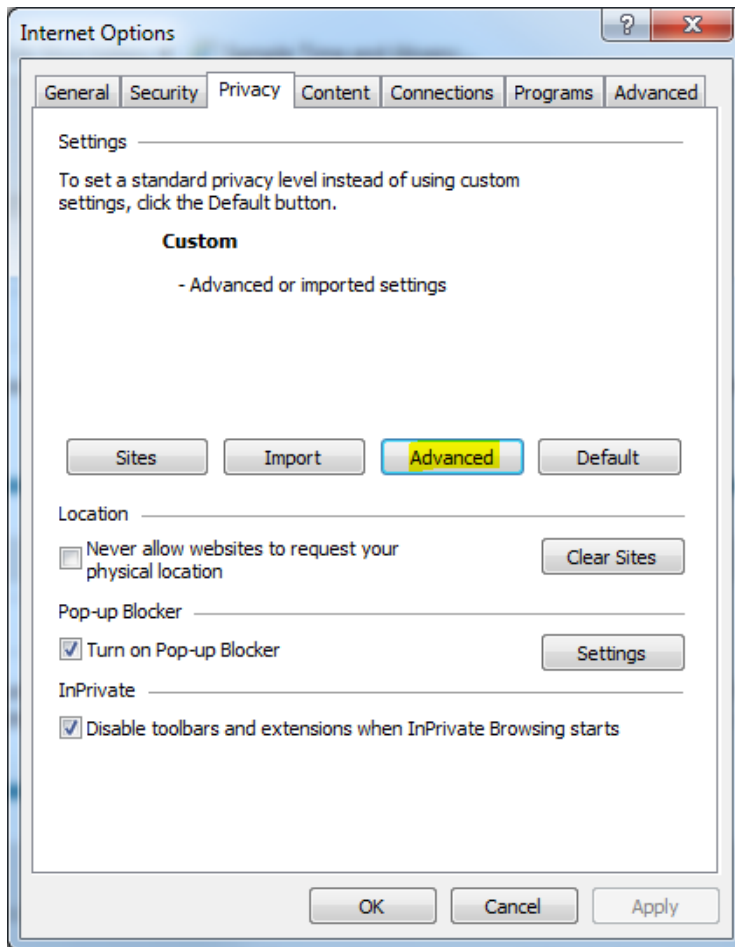
- Select “Privacy” tab
- Check “Turn on Pop-up Blocker”
- Click on “Settings” button next to “Turn on Pop-up Blocker” option
- In “Address of website to allow” add “*gov.on.ca” (to disable popup blocker for EFIS Hyperion website)





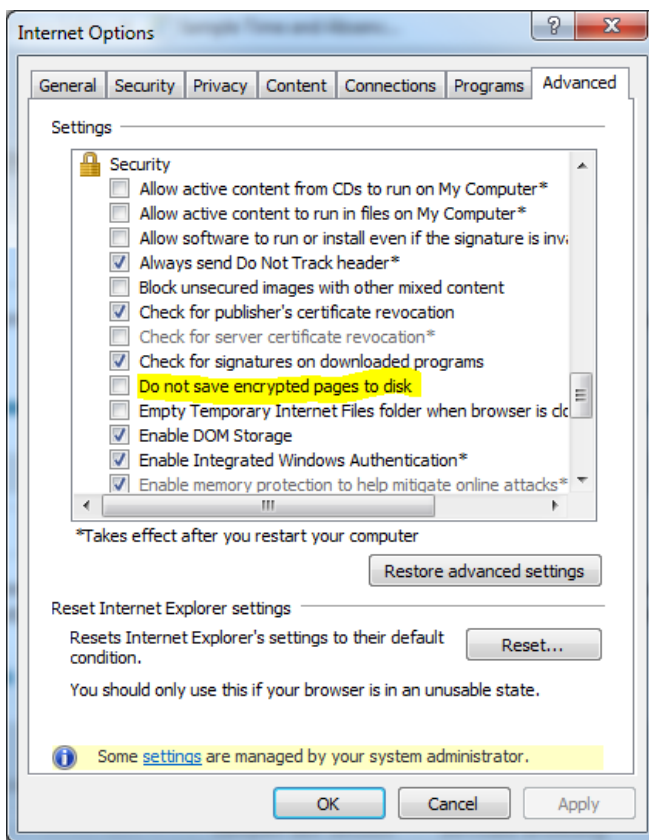
- Click “Close” ->”Apply”

- Click “Advanced” button
 - Check the “Override automatic cookie handling”
 - Select Accept for “First-party cookies” and “Third-party cookies”
 - Check “Always allow session cookies” option
 - Click “OK”



6.2.4 “Advanced” settings

- Select “Advanced” tab
- In the “Settings” section
 - Under “Security”
 - Uncheck the option “Do not save Encrypted Pages to Disk”



- Click “Apply”->”OK”

7 Smart View

To use the Smart View add-in you must be using Microsoft Office 2007, 2010 or 2013.

You need to have Administrator rights to install Smart View. Please contact your local IT support desk to provide the Administrator access.

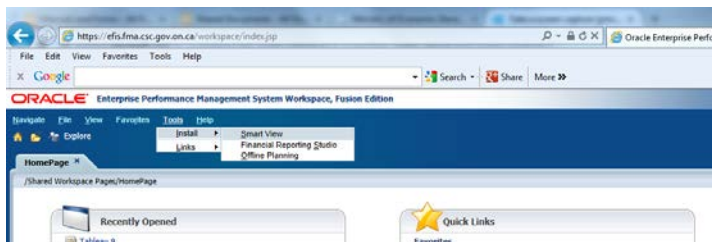
Please note: If you have an older version of Smart View already installed on your machine, please uninstall this version before proceeding with the install.

7.1 Download File

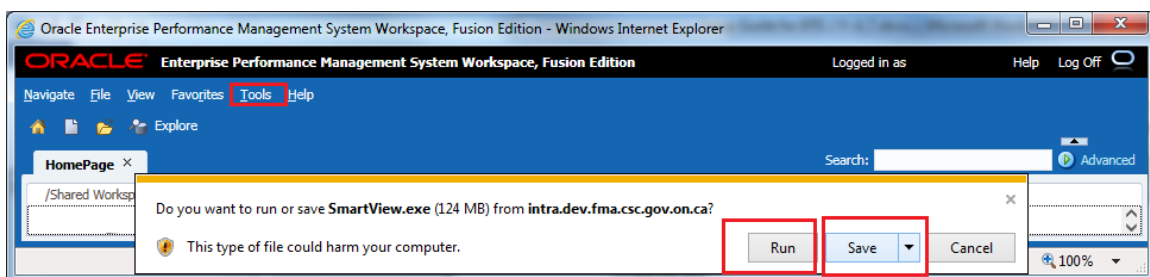
There are two methods of installing Smart View.

7.1.1 Method 1: From Within EFIS

Access the EFIS application as usual. Once you are signed in, click on 'Tools' -> 'Install' -> 'Smart View'.



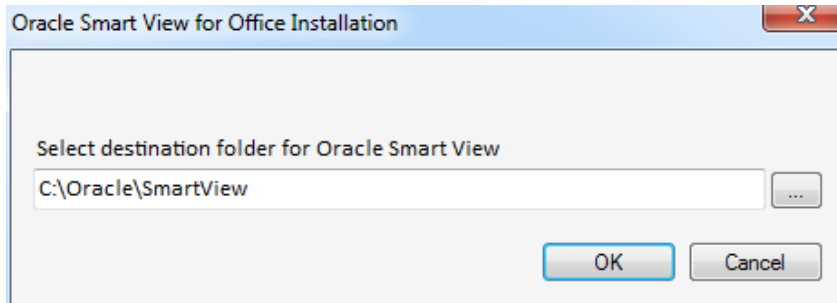
The following dialogue box will appear.



Click on '**Run**' to install the software now or '**Save**' to save the program and install later. Follow the next steps to complete the installation.

Smart View Installation

Initiate the Smart View install by navigating to the folder where you downloaded the file and then double clicking the SmartView.exe file.



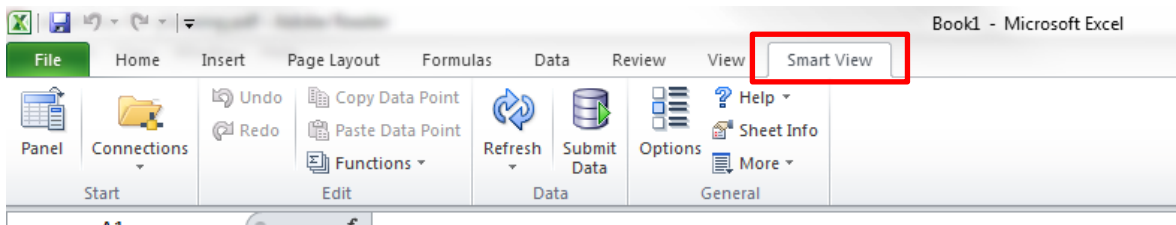
- Select your destination folder and, click OK.
- Follow prompts to complete Smart View installation.

7.1.2 Method 2 – For Ministry only:

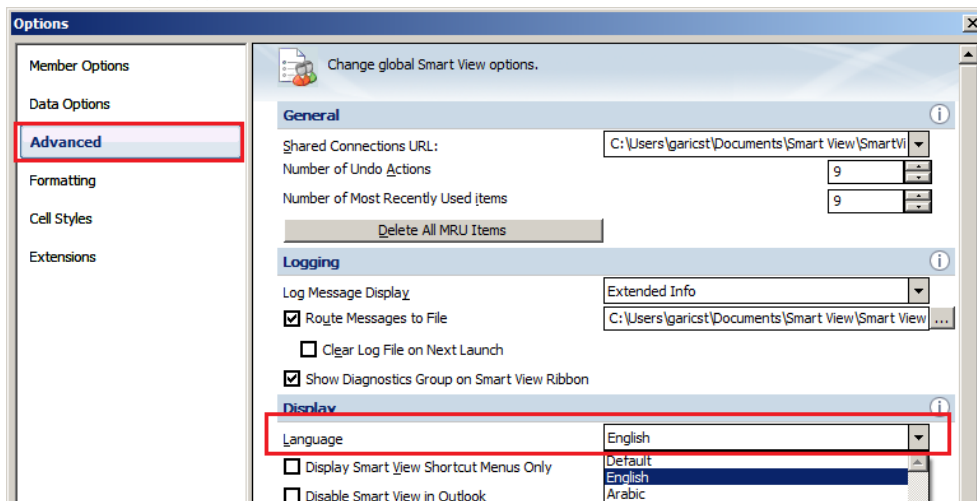
Get Help Desk to install the Radia package CSC_ORC_SMRTVW_11X20_01

7.2 Verify the installation

The next step is to open Excel and check that the Smart View Tab is visible in toolbar.



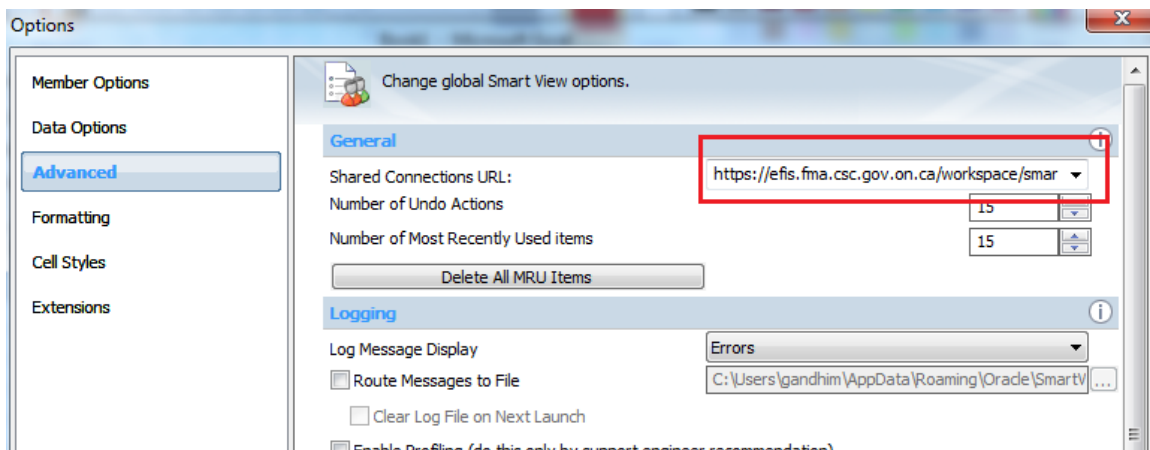
7.3 Language selection for Smart View



7.4 Setting up the connection

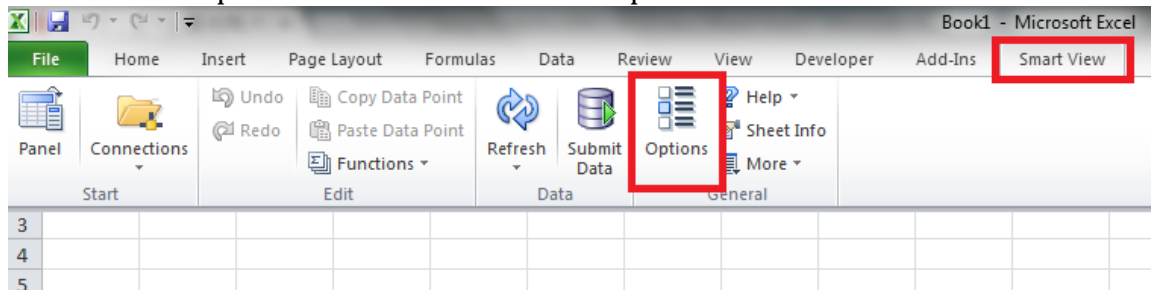
In Smart View, go to **Options**, Click on **Advanced** and specify the shared Connections URL:

<https://efis.fma.csc.gov.on.ca/workspace/SmartViewProviders>



7.5 Setting up the Options in Smart View

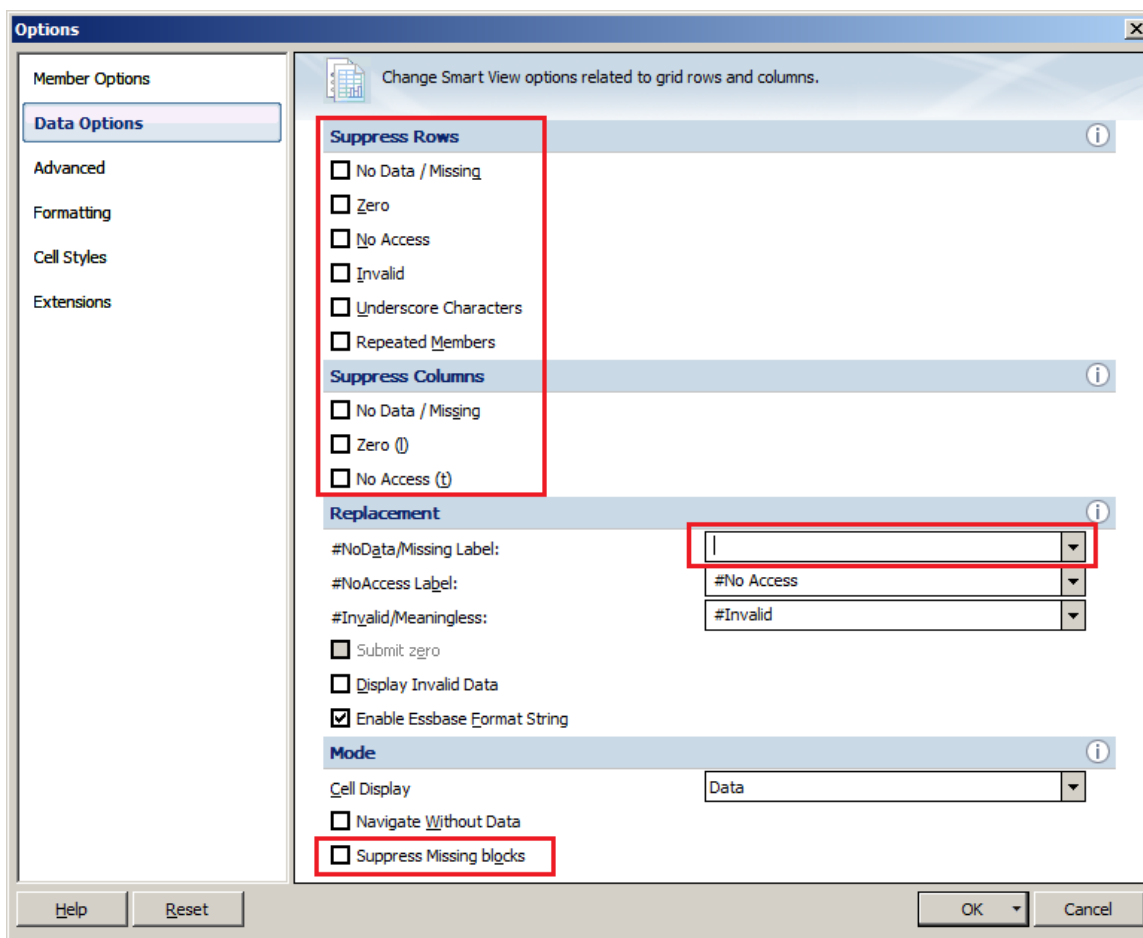
To access the Options click on Smart View – Options



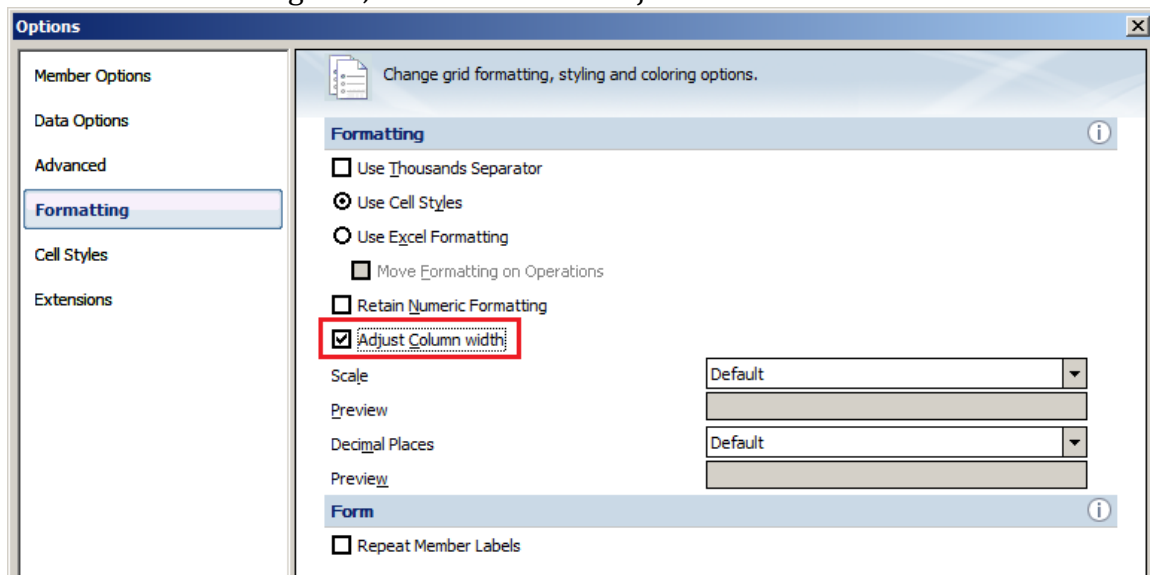
Under *Data Options* remove the check marks from following boxes under Suppress Rows and Columns.

- No Data/Missing
- Zero
- No Access
- Suppress Missing blocks

Under *Replacement*, make sure that the #NoData/Missing Label is blank

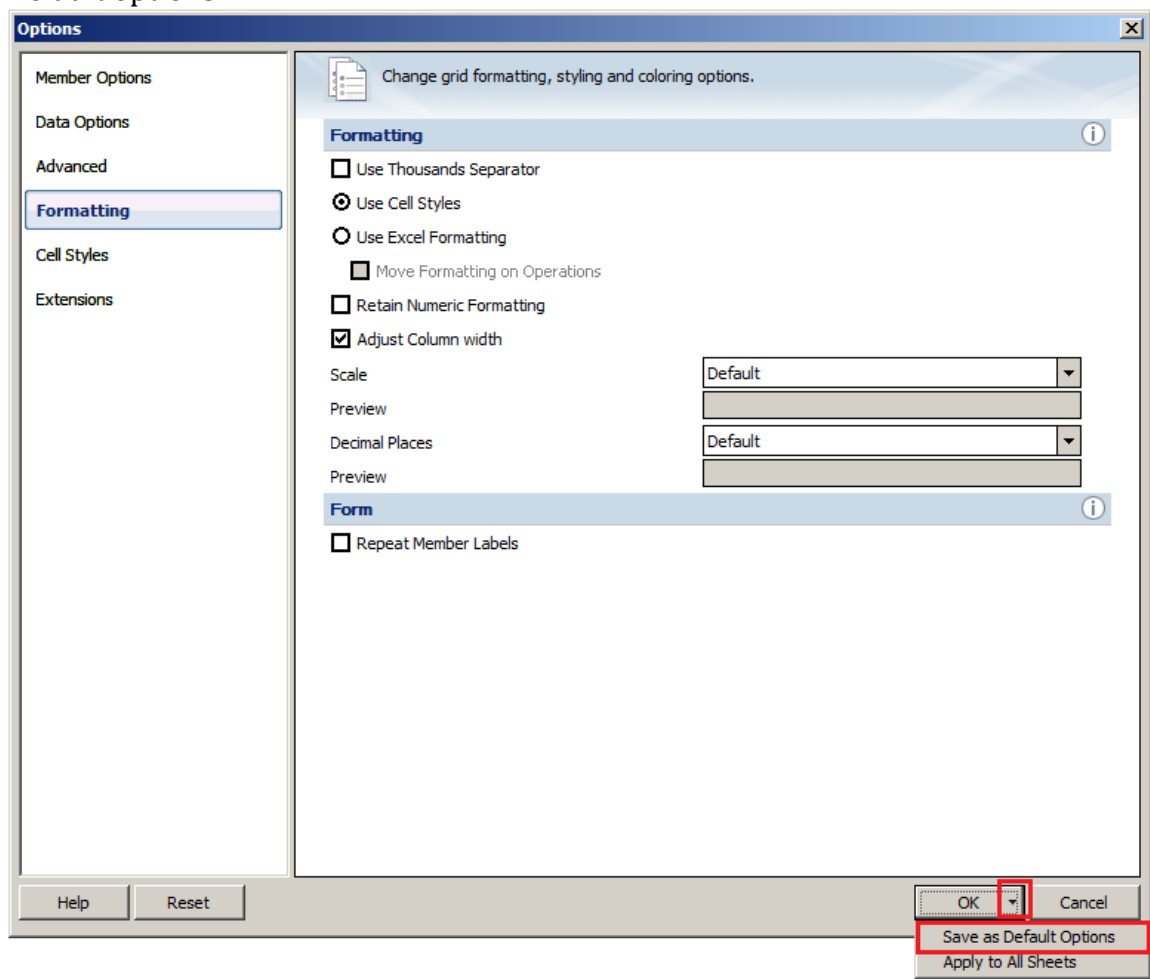


Under the Formatting Tab, make sure that “Adjust Column Width” is checked off



The screenshot shows the 'Options' dialog box with the 'Formatting' tab selected. The 'Adjust Column width' checkbox is checked and highlighted with a red box. Other options include 'Use Thousands Separator', 'Use Cell Styles', 'Use Excel Formatting', 'Move Formatting on Operations', 'Retain Numeric Formatting', 'Scale', 'Preview', 'Decimal Places', 'Form', and 'Repeat Member Labels'.

After you make changes if any, click on the arrow beside OK and select “Save as Default options”.

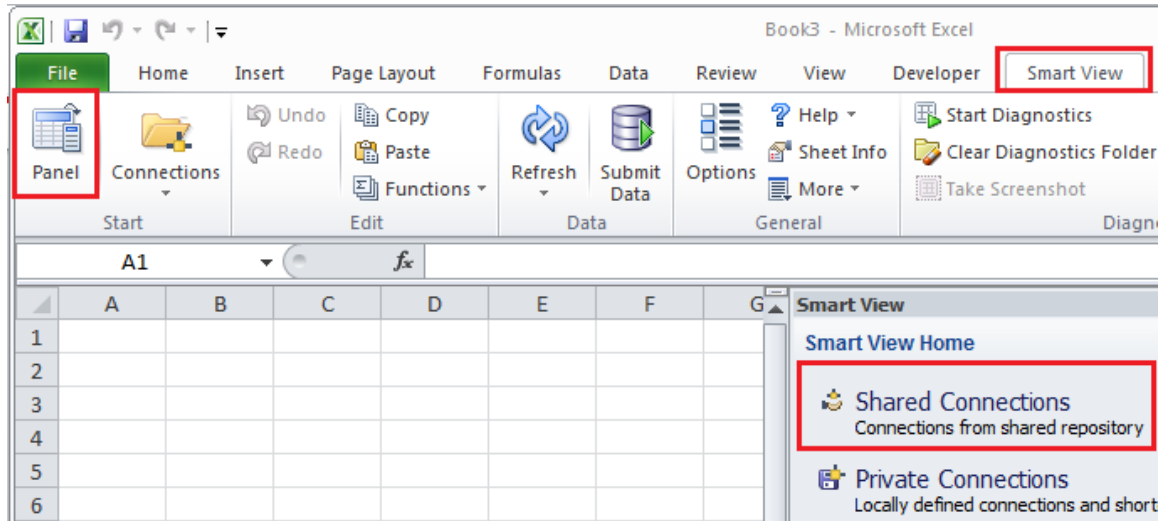


The screenshot shows the 'Options' dialog box with the 'Formatting' tab selected. The 'Adjust Column width' checkbox is checked. The 'OK' button has a dropdown arrow highlighted with a red box, and the 'Save as Default Options' option is selected from the dropdown menu. Other options include 'Use Thousands Separator', 'Use Cell Styles', 'Use Excel Formatting', 'Move Formatting on Operations', 'Retain Numeric Formatting', 'Scale', 'Preview', 'Decimal Places', 'Form', and 'Repeat Member Labels'.

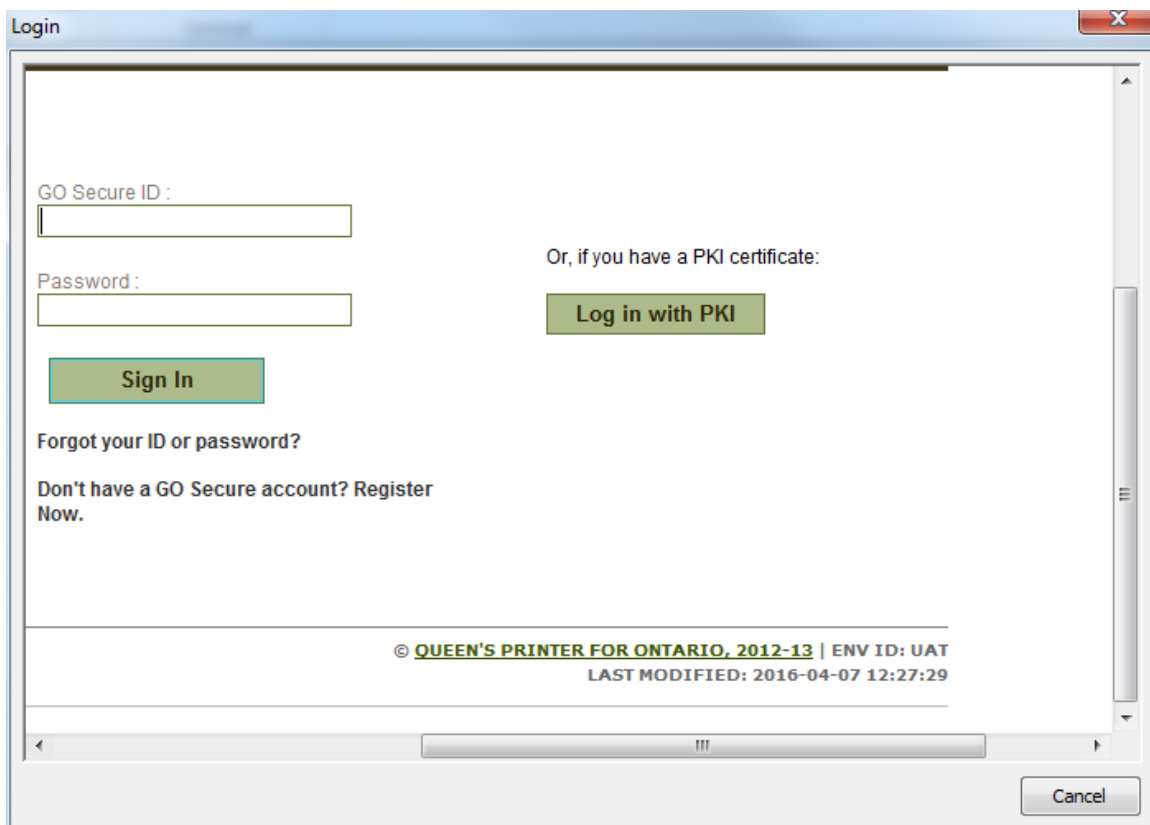
Close Excel and reopen. Check all changes done in Smart View Options were saved.

Connect to the EFIS system.

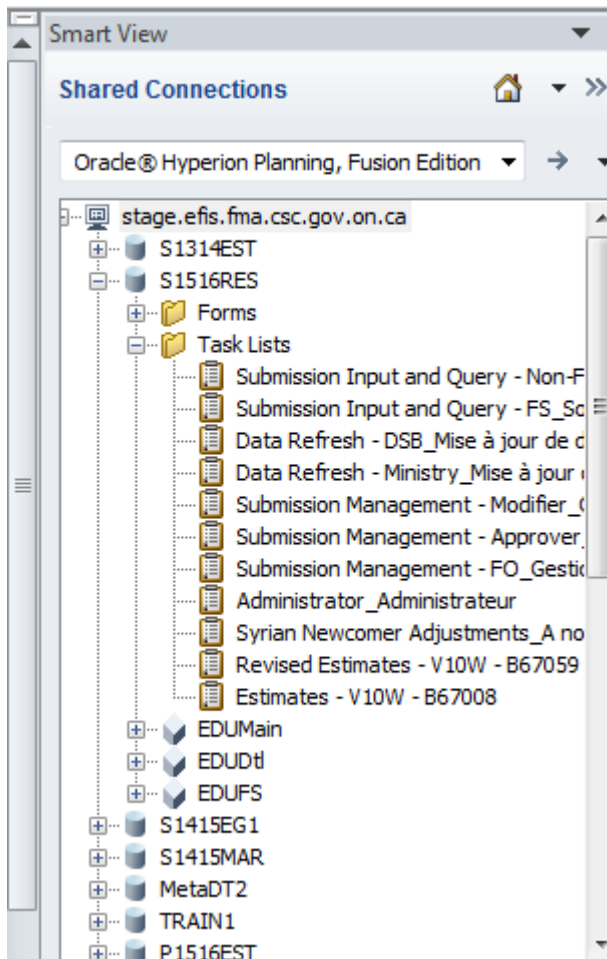
- Click on “Smart View”->”Panel”->”Shared Connections”



- Enter your credentials
- Click on “Sign In” button



- In the dropdown, Select “Oracle Hyperion Planning, Fusion Edition”
- Click on the “+” sign beside “stage.efis.fma.csc.gov.on.ca
- Click on the “+” sign beside the doc set you will work on
- Click on the “+” sign beside “Task Lists”
- Double click on the Task List you will input data



7.6 Changing Windows registry settings to fix timeout issues

Smart View users who perform large requests or have a slow network connection can encounter the error, "The request timed out. Contact administrator to increase NetRetryCount and NetRetryInterval."

When the server requires time longer than the time-out limit to return data to the browser because of the large amount of data, the time-out error will be displayed.

This issue is resolved by updating registry settings on the user's workstation to increase the timeout settings.

On the client machine, update/add the following registry keys:

1. Open the Registry, Start -> Run -> Regedit
2. For client machine with **Win 64-bit with Office 64-bit** or **Win 32-bit with Office 32-bit**, locate the following section:

**HKEY_LOCAL_MACHINE\Software\Microsoft\Windows\CurrentVersion
\Internet Settings**

Create the following new DWORD keys with decimal values:

ReceiveTimeout 1800000
KeepAliveTimeout 1800000
ServerInfoTimeout 1800000

3. If you run **Win 64-bit with Office 32-bit**, locate the following section:

**HKEY_LOCAL_MACHINE\Software\WOW6432Node\Microsoft\Windows
\CurrentVersion\Internet Settings**

Create the following new DWORD keys with decimal values:

ReceiveTimeout 1800000
KeepAliveTimeout 1800000
ServerInfoTimeout 1800000

These changes result in the timeout settings being increased to 30 min.