



Ministry of Education

EFIS 2.0 - User Guide

School Board User

Version 1.5

August, 2014

Table of Contents

1	Document History	5
2	Logon to EFIS 2.0	6
2.1	Logon through Go Secure	6
2.2	Book Marking the Link.....	7
3	Planning User Set Up	8
3.1	Reporting Settings.....	8
3.2	Display Options.....	12
3.3	Setup your Home Page	13
3.4	Change Language.....	14
3.4.1	Firefox	14
3.4.2	IE.....	15
3.4.3	Set Language in Planning.....	16
4	Planning Navigation.....	18
4.1	Selecting an Application (Doc Set)	18
4.2	EFIS 2.0 Task List	20
4.2.1	Expand and Collapse Task List.....	21
4.3	How to Navigate in Planning using Task List	25
4.3.1	Input Data Navigation	26
4.3.1.1	School Level Data Navigation – Input.....	28
4.3.1.2	Board Level Enrolment Navigation- Input.....	29
4.3.1.3	Allocation (Sections) Navigation- Input.....	30
4.3.1.4	Schedules Navigation- Input.....	31
4.3.1.5	Data Forms Navigation- Input.....	32
4.3.1.6	Appendices Navigation- Input.....	33
4.3.1.7	Errors and Warnings Navigation- Input	34
4.3.2	Reports Data Navigation	36
4.3.3	Results Data Navigation	37
4.3.4	Reference Data Navigation	38
4.3.5	Validation Formats Navigation	40
4.3.6	Submission Management Navigation	41
4.4	Navigation Using Forms.....	42
5	Data Input	43

5.1	Data Input – Forms.....	43
5.1.1	Opening a Form.....	43
5.1.2	Enable Input Field.....	44
5.1.3	Key in Input Field.....	45
5.1.4	Save input field.....	46
5.1.5	Invalid Data.....	47
5.1.6	Prior Year Adjustment.....	50
5.1.7	Input Form Types.....	51
5.1.8	Distribution of Elementary and Secondary Data.....	52
5.2	Cell Right Click Functionality.....	54
5.2.1	Edit.....	54
5.2.2	Comments.....	55
5.2.3	Supporting Details.....	58
5.2.4	Show Change History.....	60
5.3	Reports.....	61
5.3.1	Running a Report.....	62
5.3.2	Generating Report Books.....	67
5.3.3	Opening a report in Excel.....	70
5.4	Results.....	72
5.4.1	Viewing Results in a Form.....	72
5.4.2	Viewing Results in Excel.....	73
5.5	Reference Data.....	75
6	Smart View.....	77
6.1	Smart View User Set Up.....	77
6.1.1	Setting up the Connection.....	77
6.1.2	Setting up Smart View Options.....	78
6.1.2.1	Data Options.....	78
6.1.2.2	Member Options.....	79
6.1.2.3	Formatting.....	80
6.1.3	Connecting Smart View to Database.....	81
6.1.4	Alternative way to open Smart View form via planning application.....	84
6.2	Data Input.....	85
6.3	Input data validation.....	87
6.4	Advanced Smart View Functionality.....	88
7	Submission Management.....	92
7.1	Overview of Versions.....	92
7.1.1	Copy Data Between Versions.....	93

7.1.1.1	Copy to FO Viewable.....	97
7.1.2	Version Description and Summary Dashboard in the task list	98
7.2	Approvals Process – Board Modifier	99
7.2.1	Flag Submission for Approval.....	99
7.2.2	Validate Submission.....	100
7.2.3	Promote Submission	103
7.3	Manage Approvals – Board Approver	106
7.3.1	Approve and Sign-off	106
7.3.2	Reject and return submission to the Board Modifier.....	107
7.3.3	Submission with Error Override	110
7.3.4	Checking the Submission History.....	114
8	Facility Data Management	115
8.1	Process Overview.....	115
8.2	SFIS Data Management Form.....	115
9	Prior Year Data Management	119
9.1	Prior Year Data Overview.....	119
9.2	Adjustable Prior Year Data	119
9.3	Non Adjustable Prior Year Data	122
10	OnSIS Data.....	125
10.1	Data Viewing Area.....	125
10.1.1	Loaded Enrolment Data Tab	128
10.1.2	Ministry Adjustment-Input (Ministry user only).....	128
10.1.3	Ministry Adjustment Review.....	129
10.1.4	OnSIS Enrolment Data Review	130
10.2	Multiple BSID.....	131
10.3	Facility- Based Data Distribution.....	131

1 Document History

Document History			
Version	Date	Changed by	Description of changes
1.0	April 23, 2014	FAAB	Final Version
1.1	August 20, 2014	Vlad Dragovic	Updated for FS Cycle
1.2	August 20, 2014	Al McLaren	Review of Updates
1.3	August 20, 2014	Vlad Dragovic	Facility- data distribution addon
1.4	Sept 02, 2014	Vlad Dragovic	Remove Appendix A
1.5	Sept 03, 2014	Vlad Dragovic	Add Appendix A- file distribution
1.6	Sept 04, 2014	Vlad Dragovic	French screenshots



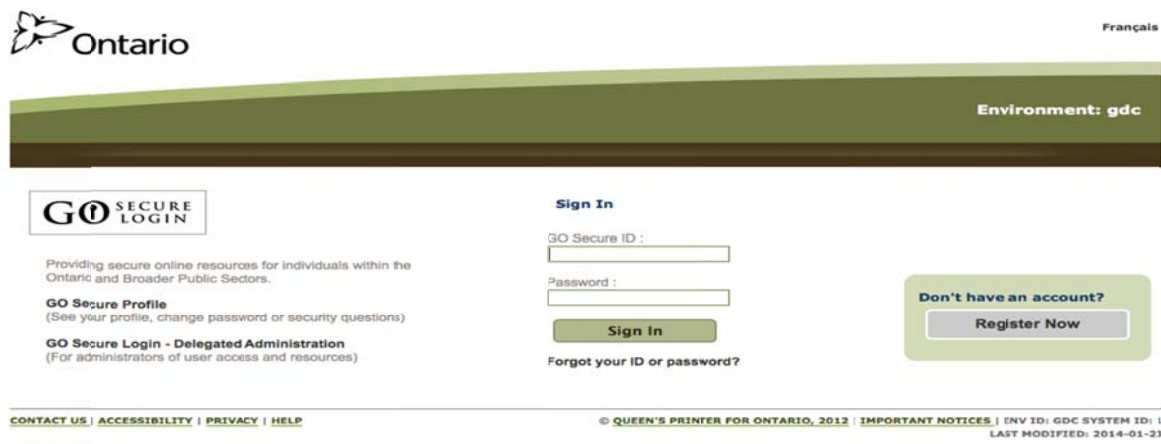
2 Logon to EFIS 2.0

2.1 Logon through Go Secure

EFIS 2.0 URL: <https://efis.fma.csc.gov.on.ca/workspace/index.jsp>

In order to log into the application, you need the Go Secure credential, if you haven't registered yet please follow the instructions in the registration Guide (EFIS_User_Registration_Instructions_Final_English).

The Application link will redirect to a Go Secure login page. Enter your **User ID** and **Password**



Ontario Français

Environment: gdc

GO SECURE LOGIN

Providing secure online resources for individuals within the Ontario and Broader Public Sectors.

GO Secure Profile
(See your profile, change password or security questions)

GO Secure Login - Delegated Administration
(For administrators of user access and resources)

Sign In

GO Secure ID :

Password :

Sign In

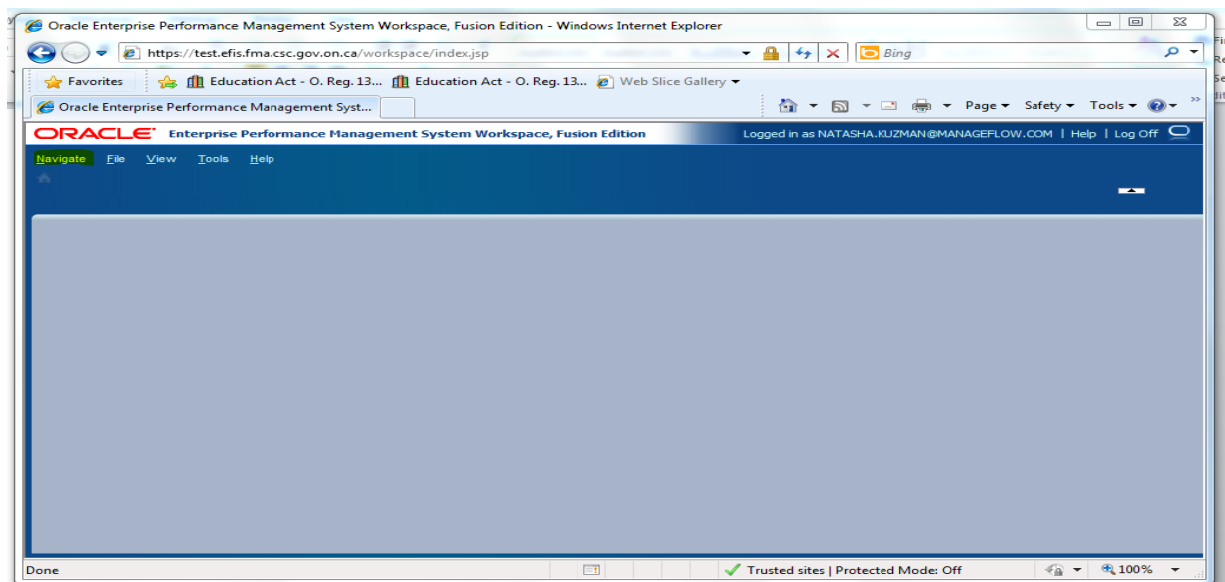
[Forgot your ID or password?](#)

Don't have an account?

Register Now

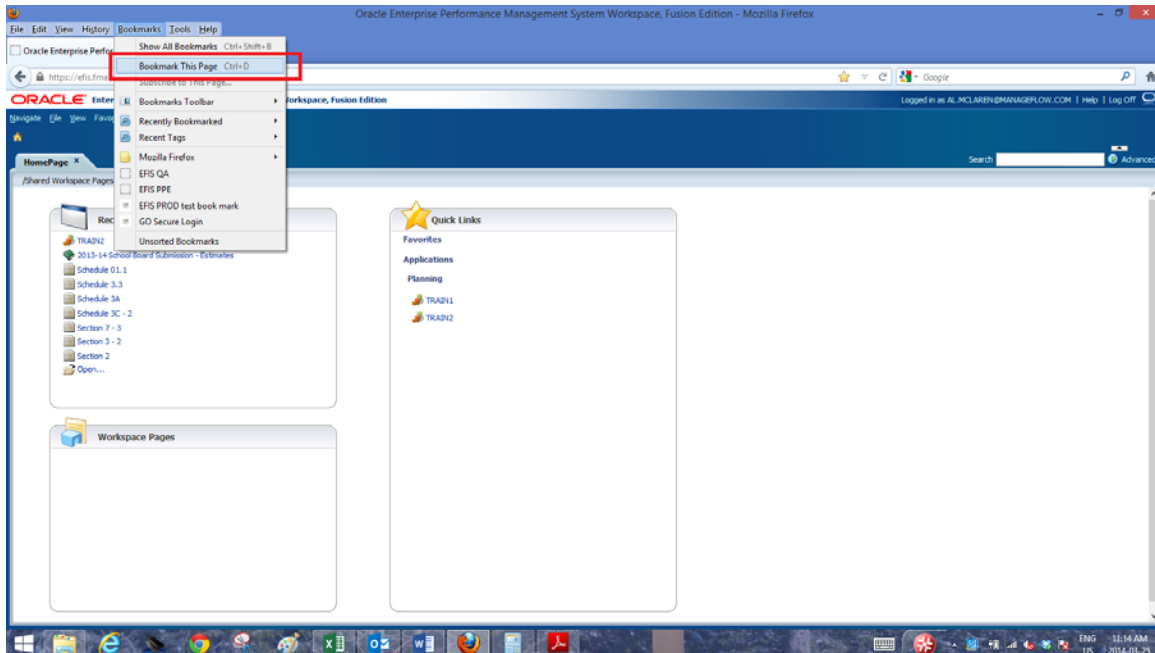
[CONTACT US](#) | [ACCESSIBILITY](#) | [PRIVACY](#) | [HELP](#)
© QUEEN'S PRINTER FOR ONTARIO, 2012 | IMPORTANT NOTICES | ENV ID: GDC SYSTEM ID: 1 | LAST MODIFIED: 2014-01-23

Once you click on **Sign In** you will be directed into EFIS 2.0 application.



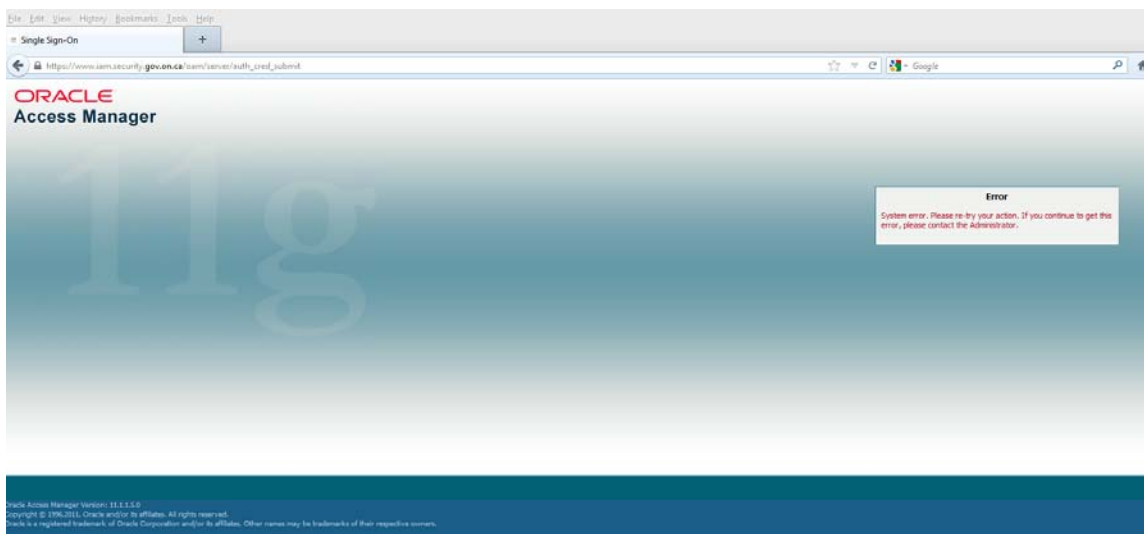
2.2 Book Marking the Link

To book mark the link to EFIS 2.0 you need to create the link once you are in the application and **NOT** when you are in the Go Secure screen.



If you get the error screen below check that the book mark to ensure it is **NOT** the following:

<https://www.iam.security.gov.on.ca/gold/access/index.jsp>



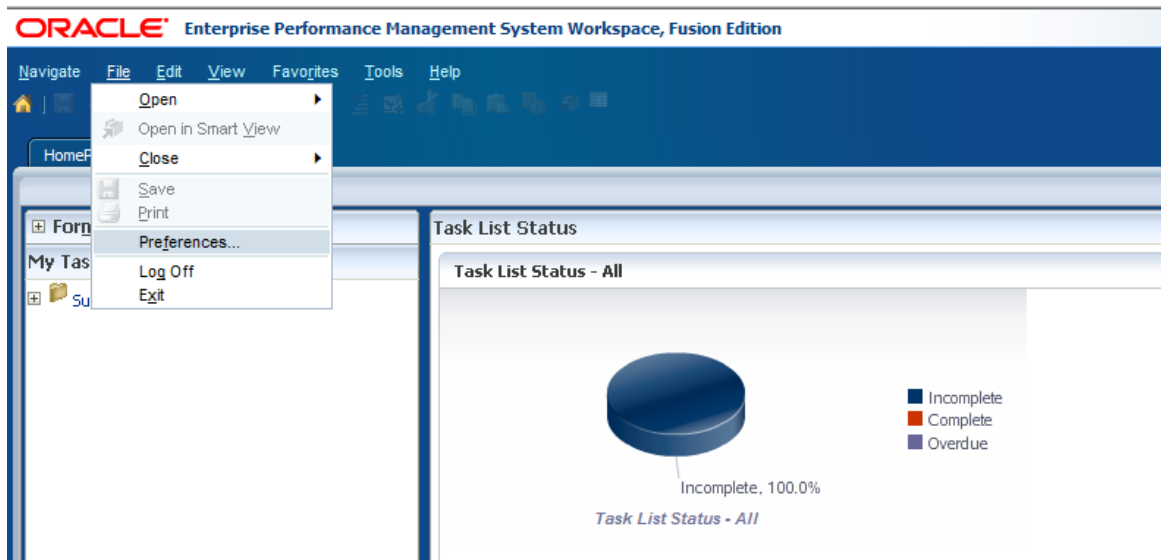
3 Planning User Set Up

Each Cycle (Estimates, Revised Estimates, etc.) the user must set up there user preferences.

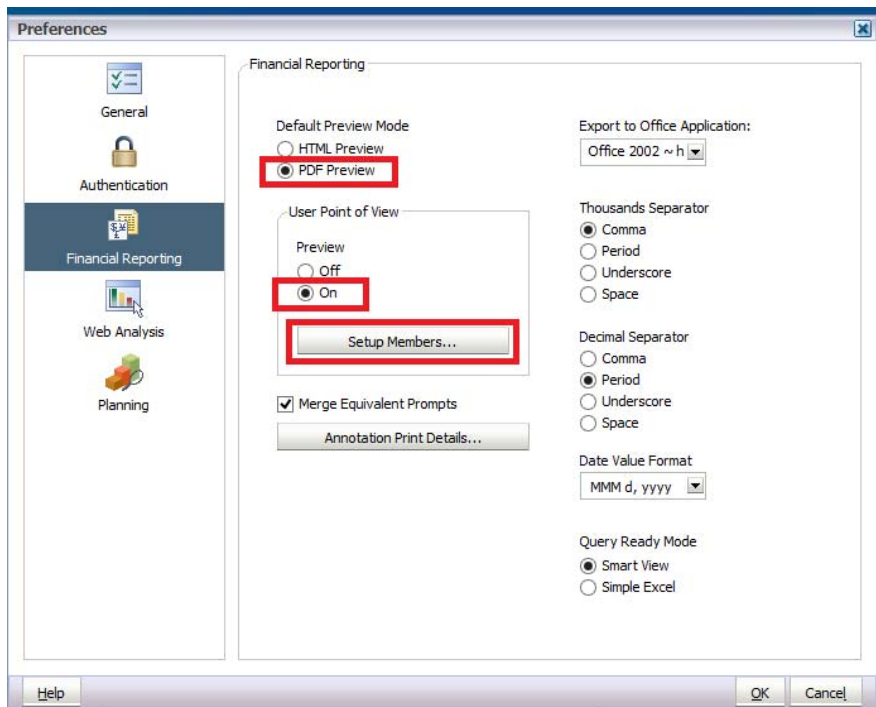
3.1 Reporting Settings

In order to generate reports, users are required to perform a simple one-time setup of User Point of View:

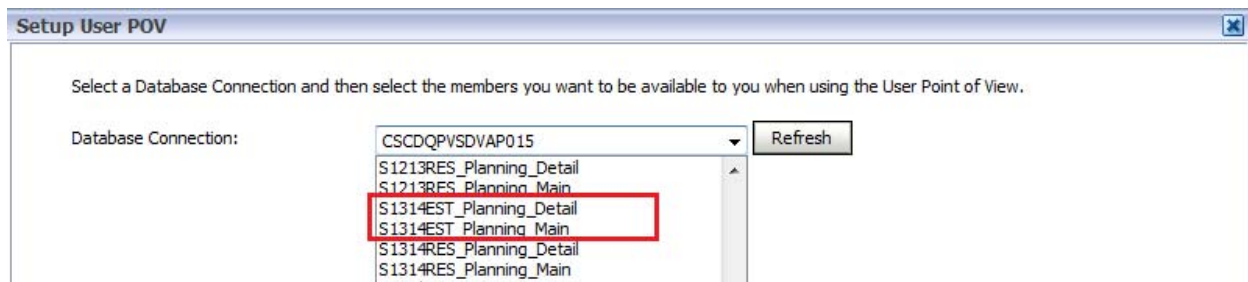
In Planning, go to **File → Preferences**



In the popup dialogue, select **Financial Reporting** on the left pane. In **Default Preview Mode** select **PDF Preview**. In **User Point of View**, select “**On**” and click on **Setup Members**



In the resulting Setup User POV dialog, click on the **Database Connection** dropdown. There are two connections for each Planning application, a “**Main**” one for input and calculation at the District School Board level, and a “**Detail**” one for the School level.



Select the “**Main**” database connection. Make the following selections and click **Apply**:

- Choices List for all dimensions: **All Members**
- Display Member Label as: **Default**
- Dimension Labels are: **Included**
- Member Selection Displays: **Only Members I Can Access**

Setup User POV

Select a Database Connection and then select the members you want to be available to you when using the User Point of View.

Database Connection: S1314EST_Planning_Main Refresh

Dimension	Choices List	
Account	All Members	All
Period	All Members	All
Year	All Members	All
Scenario	All Members	All
Version	All Members	All
DSB	All Members	All
Category	All Members	All
SubCategory	All Members	All

Display Member Label as: Default

Dimension Labels are: Included

Member Selection Displays: Only Members I Can Access

* This setting applies to all Planning datasources.

Help OK Cancel Apply (N)

In the Database Connection dropdown, select the “**Detail**” connection. Make the following selections and click **Apply**:

- Choices List for all dimensions: **All Members**
- Display Member Label as: **Default**
- Dimension Labels are: **Included**
- Member Selection Displays: **Only Members I Can Access**

Setup User POV

Select a Database Connection and then select the members you want to be available to you when using the User Point of View.

Database Connection: S1314EST_Planning_Detail Refresh

Dimension	Choices List	
Account	All Members	All
Period	All Members	All
Year	All Members	All
Scenario	All Members	All
Version	All Members	All
DSB	All Members	All
Category	All Members	All
SubCategory	All Members	All
School_ID	All Members	All
Facility	All Members	All
Municipality	All Members	All

Display Member Label as: Default

Dimension Labels are: Included

Member Selection Displays: Only Members I Can Access

* This setting applies to all Planning datasources.

Help OK Cancel Apply (N)

Click **OK** to close the Setup User POV dialog. Click **OK** to close the Preferences dialog

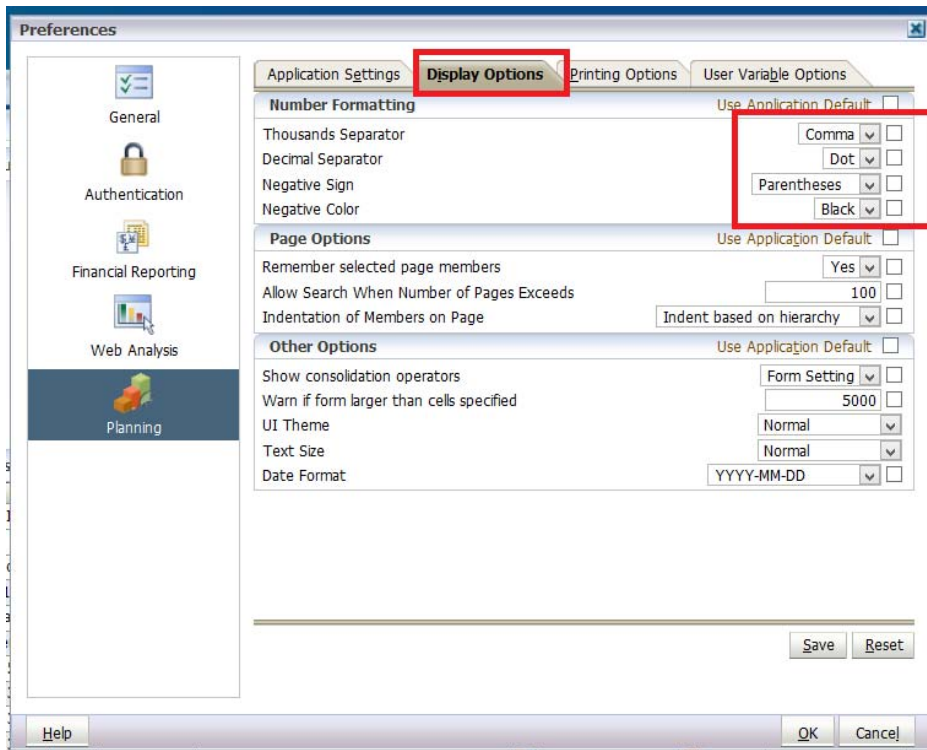


At the start of a new cycle or if you are having issues connecting to EFIS 2.0 it is good practice to clear the Browser cache, this is done by selecting the clear recent history from the browser menu and selecting clear all.



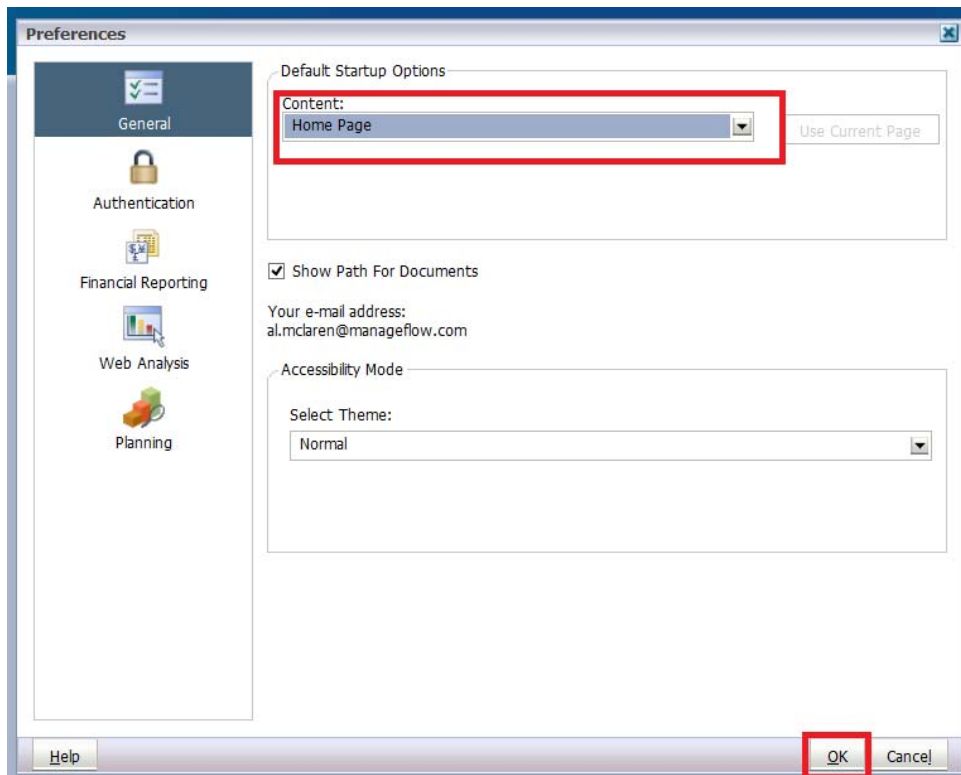
3.2 Display Options

Once the user has selected an application they are able to set the display preferences. Select **File** → **Preferences** to access the Preferences screen, select **Planning** then select the desired **Number Formatting** from the dropdown lists then **OK** on the Preferences screen.



3.3 Setup your Home Page

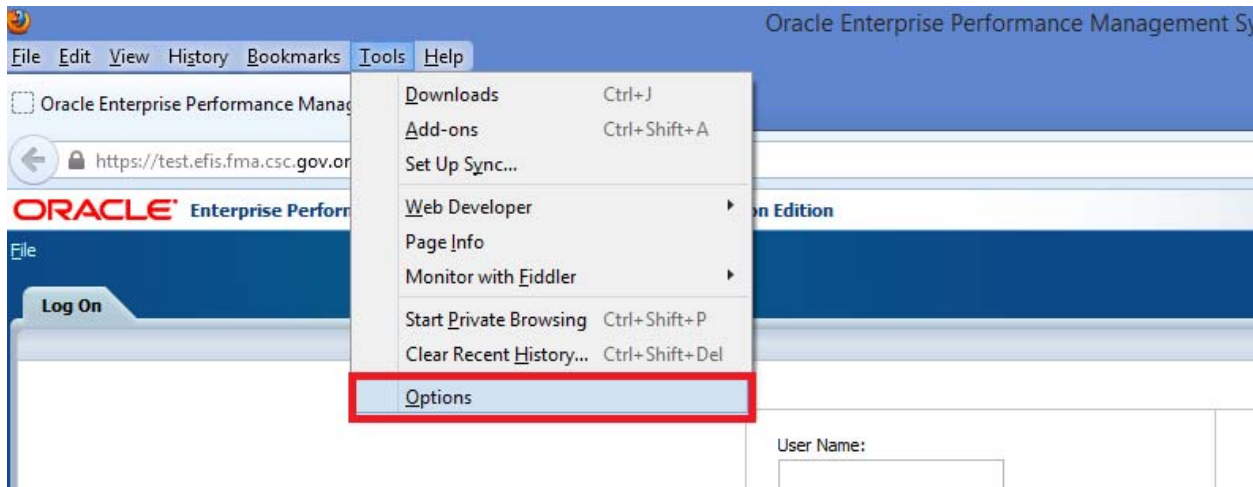
To set a home page to allow for quick access to your applications select **File** → **Preferences** to access the Preferences screen, select **General** then select Home Page from the **Content** dropdown list then **OK** on the Preferences screen



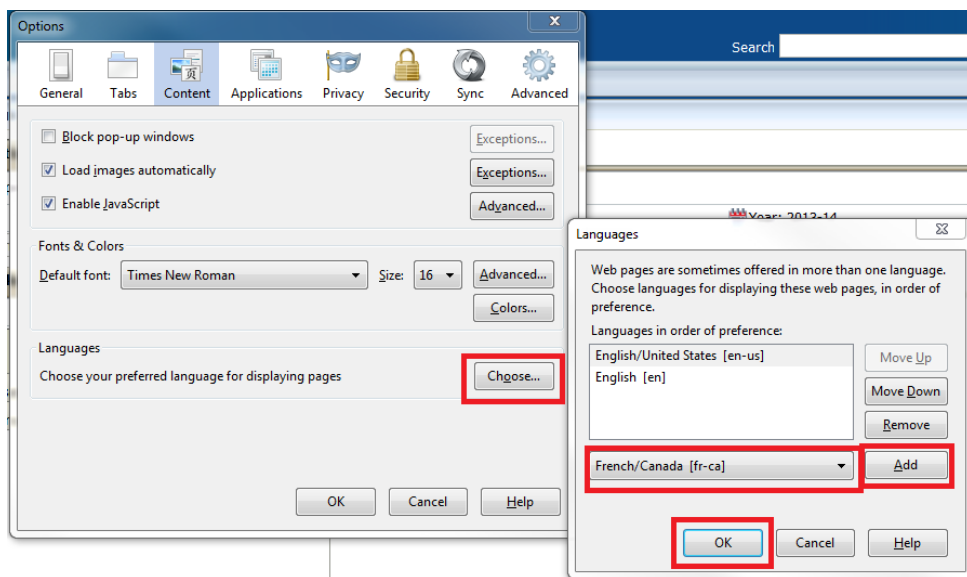
3.4 Change Language

3.4.1 Firefox

Firefox users can change the Firefox page display to French Language by selecting, **Tools → Options**

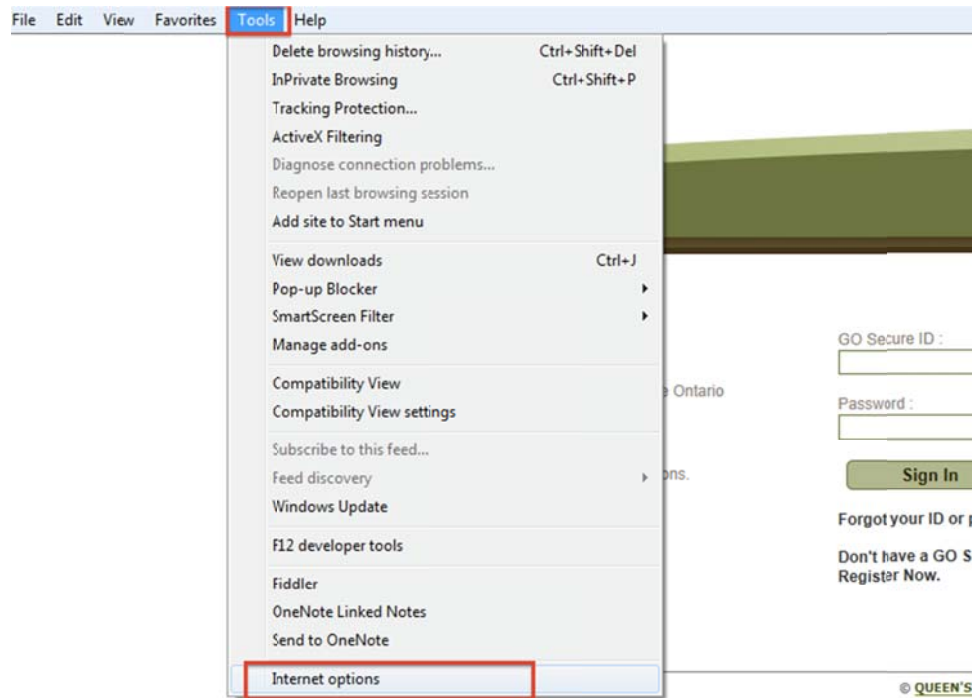


In the **Options** Screen in the Language section select the **Choose** button, **French/Canada** from the Language dropdown list, select **Add** then Select **OK**. You will need to restart the browser for these setting to take effect.

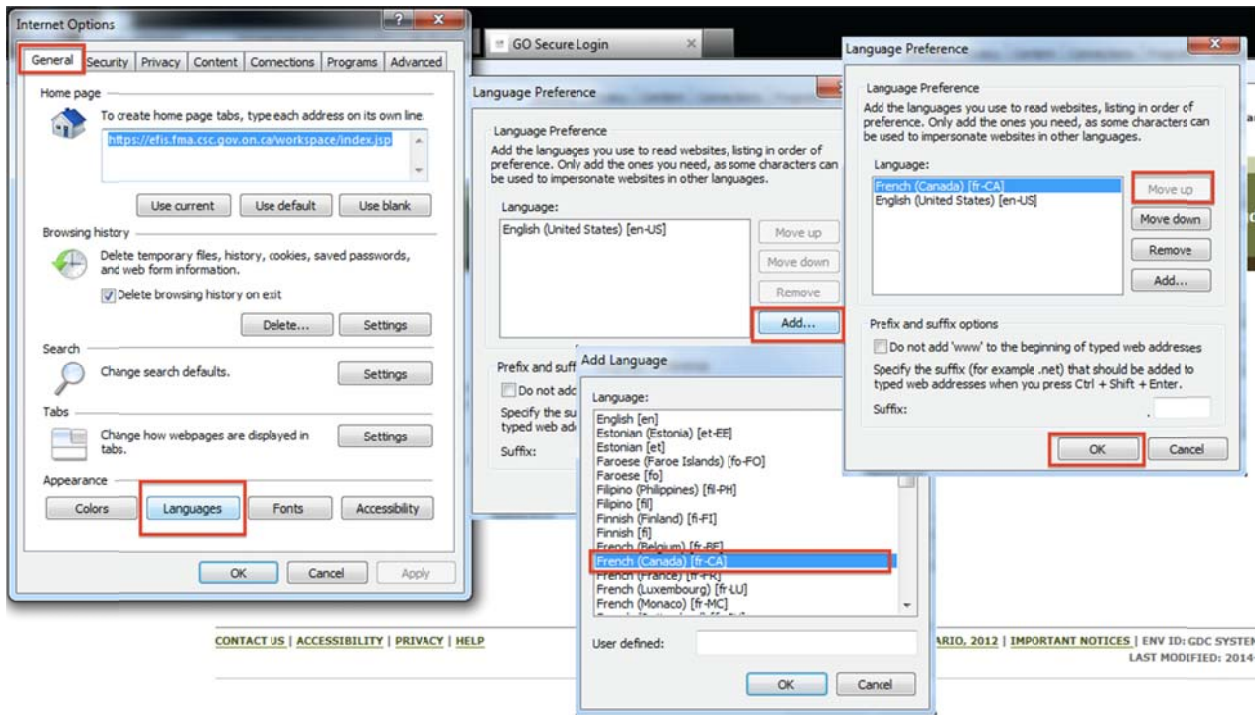


3.4.2 IE

IE users can change the IE page display to French Language by selecting, **Tools** → **Internet Options**

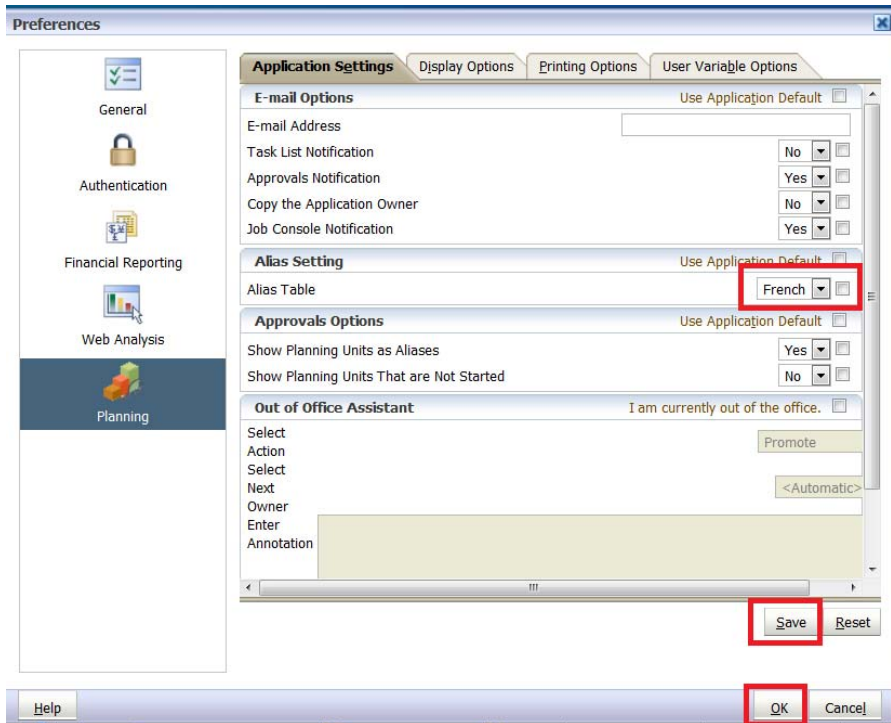


In the **General** Screen select **Language** and then add French/(Canada)[fr-CA] from the Language dropdown list then Select **OK**. You will need to restart the browser for these setting to take effect.



3.4.3 Set Language in Planning

To set the Language in Planning, go to **File → Preferences**. Select Planning on the **Preferences** screen select French as the Alias setting, select **Save** then Select **OK**.

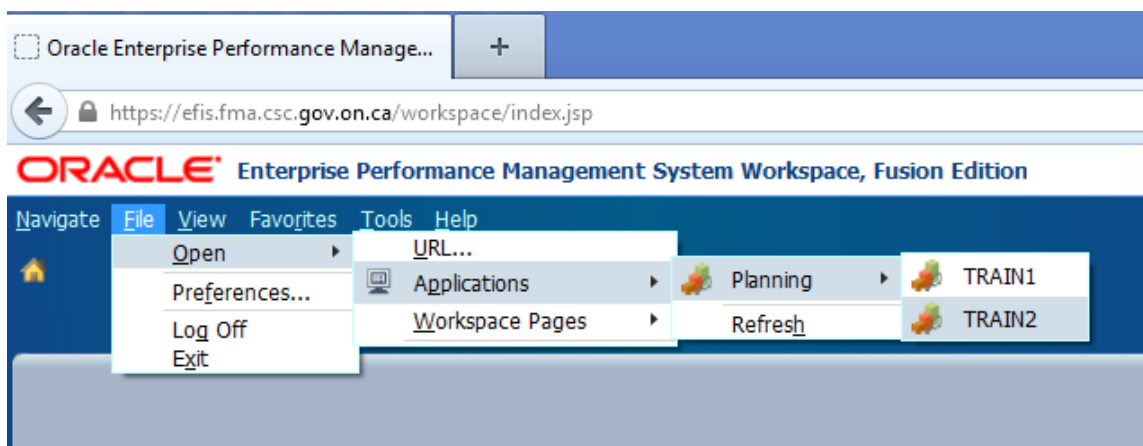
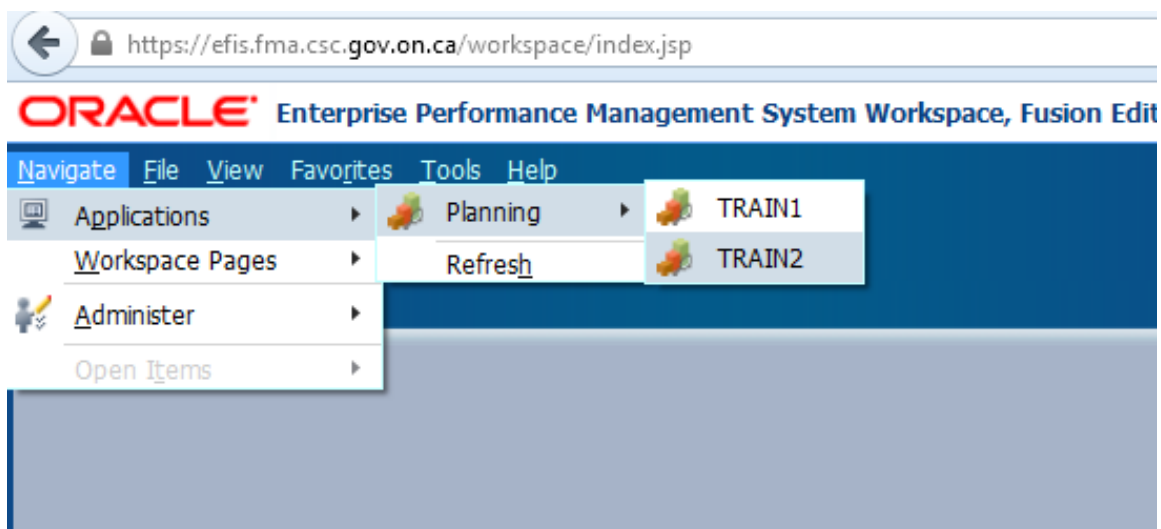


4 Planning Navigation

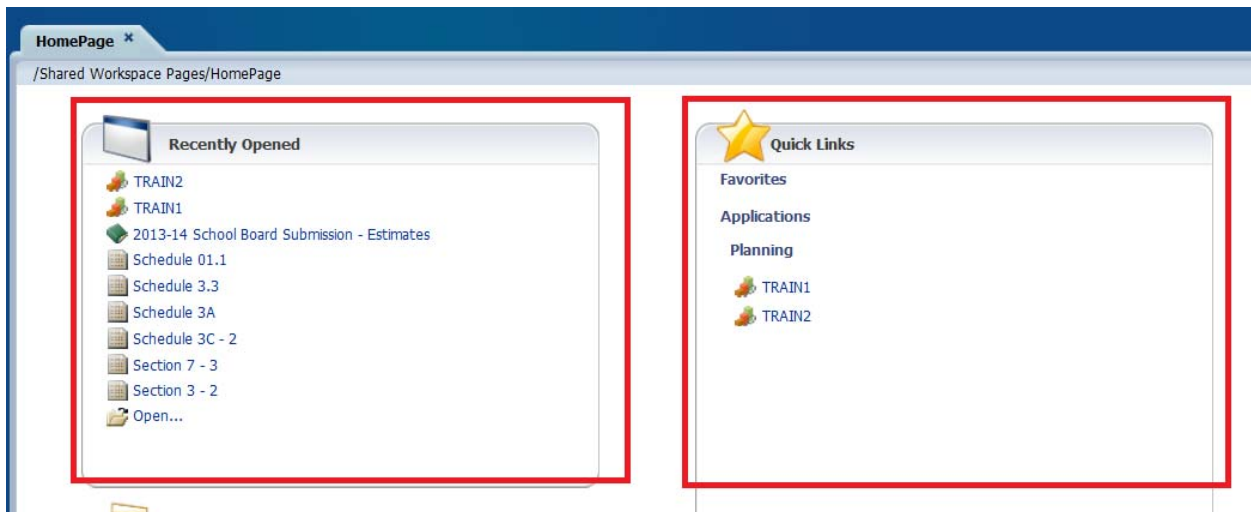
4.1 Selecting an Application (Doc Set)

The application can be opened using one of the following methods:

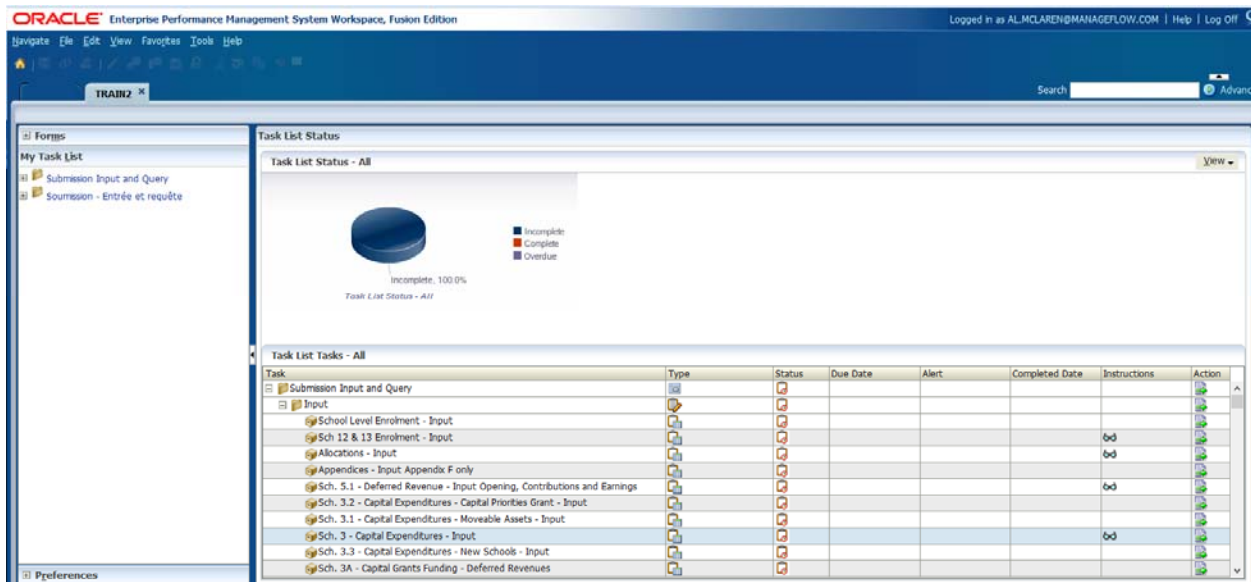
To open the application from the menu bar either select → **Navigate** → **Applications** → **Planning** → **application name** (where **application name** is the application you wish to open), or **File** → **Open** → **Applications** → **Planning** → **application name**



An alternative way to open applications is use a Home Page (see section 5.3 for setup). The application can be selected from either the **Quick Links** or the **Recently Opened** list.



Once the user selects the **Application** using one of the above methods the **My Task List** will be displayed. The user will have the choice of using either an English or a French Task List.



4.2 EFIS 2.0 Task List

The Task List provides a central access point to all forms, reports and workflow activities that are available to each user type. The Task List has been organized to follow a suggested order of data input.

The Task List is hierarchical. Users drill down into lower level tiers of the Task List to reveal additional detail.

The Task List, when fully expanded is grouped into Input, Reports, Results, Reference Data, Validation Formats and Submission Management folders.

Oracle Enterprise Performance Management System Workspace, Fusion Edition. Logged in as ALMCLAREN@MANAGEFLOW.COM | Help | Log Off

Task List Status

Task List Status - All

Incomplete: 100.0%

Task List Tasks - All

Task	Type	Status	Due Date	Alert	Completed Date	Instructions	Action
Submission Input and Query							
Input							
School Level Enrolment - Input							
Sch 12 & 13 Enrolment - Input						bd	
Allocations - Input						bd	
Appendices - Input Appendix F only							
Sch. 5.1 - Deferred Revenue - Input Opening, Contributio						bd	
Sch. 3.2 - Capital Expenditures - Capital Priorities Grant -							
Sch. 3.1 - Capital Expenditures - Moveable Assets - Input							

Oracle Enterprise Performance Management System Workspace, Fusion Edition. Logged in as ALMCLAREN@MANAGEFLOW.COM | Help | Log Off

Task List Status

Task List Status - All

Incomplete: 100.0%

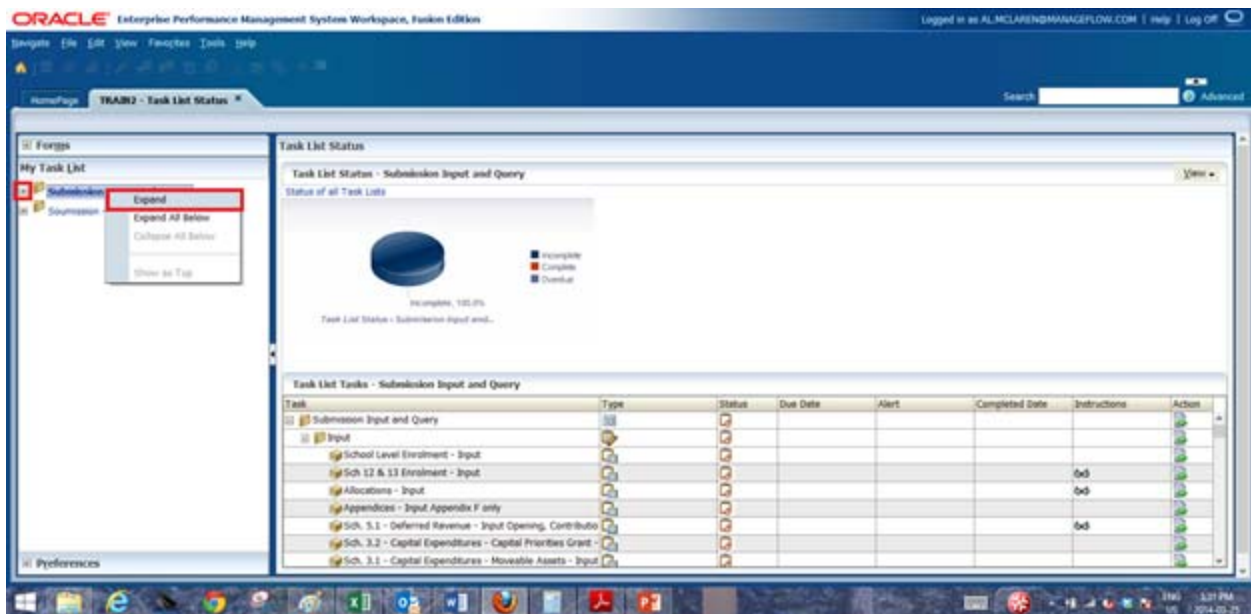
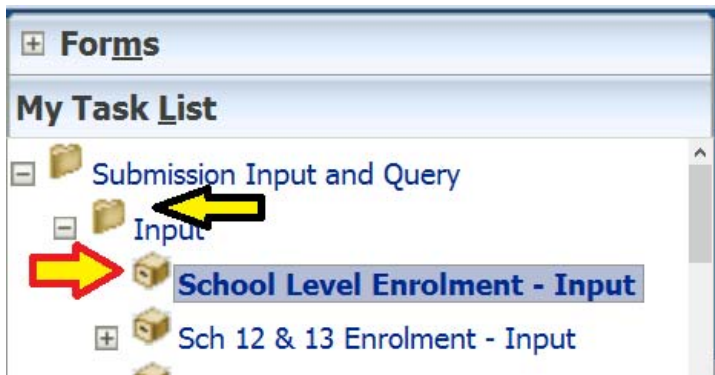
Task List Tasks - All

Task	Type	Status	Due Date	Alert	Completed Date	Instructions	Action
Submission Input and Query							
Input							
School Level Enrolment - Input							
Sch 12 & 13 Enrolment - Input						bd	
Allocations - Input						bd	
Appendices - Input Appendix F only							
Sch. 5.1 - Deferred Revenue - Input Opening, Contributio						bd	
Sch. 3.2 - Capital Expenditures - Capital Priorities Grant -							
Sch. 3.1 - Capital Expenditures - Moveable Assets - Input							

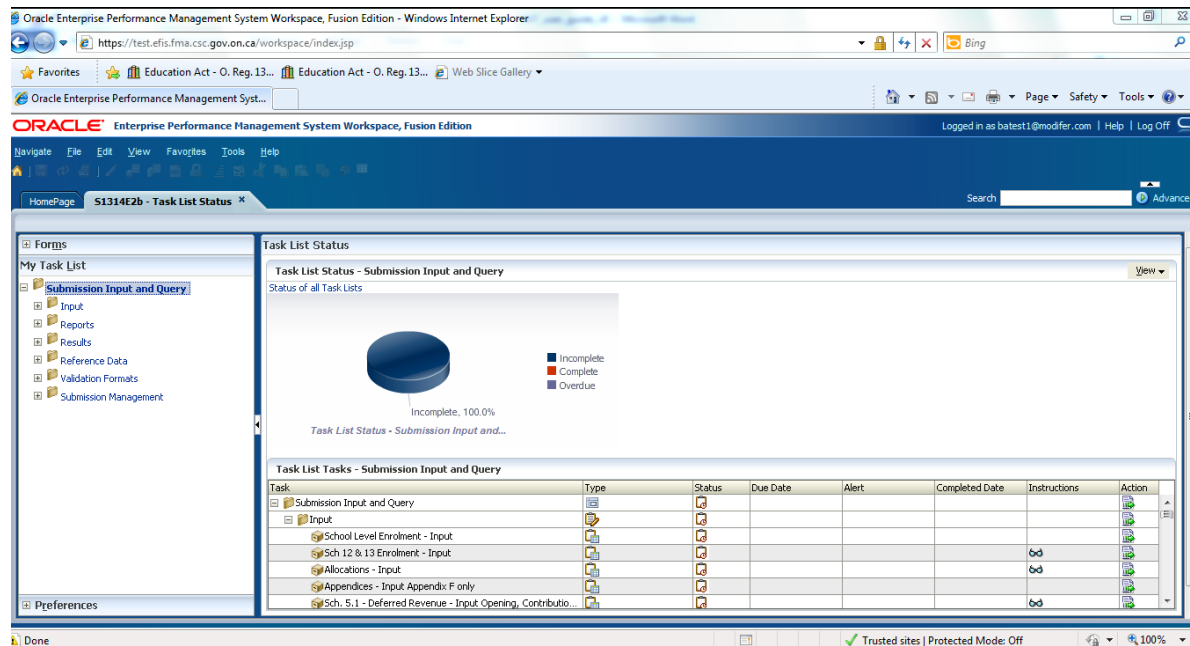
4.2.1 Expand and Collapse Task List

Task Lists are organized into folders that contain cubes, to drill down through folders the user navigates to the folder, right clicks and selects **Expand** or the + box next to the folder. To expand one level of folders select **Expand**, to expand all the folders below the selected folder select **Expand All Below**. To access the **Task** (Form, Report, etc.) the user will click on the Cube.

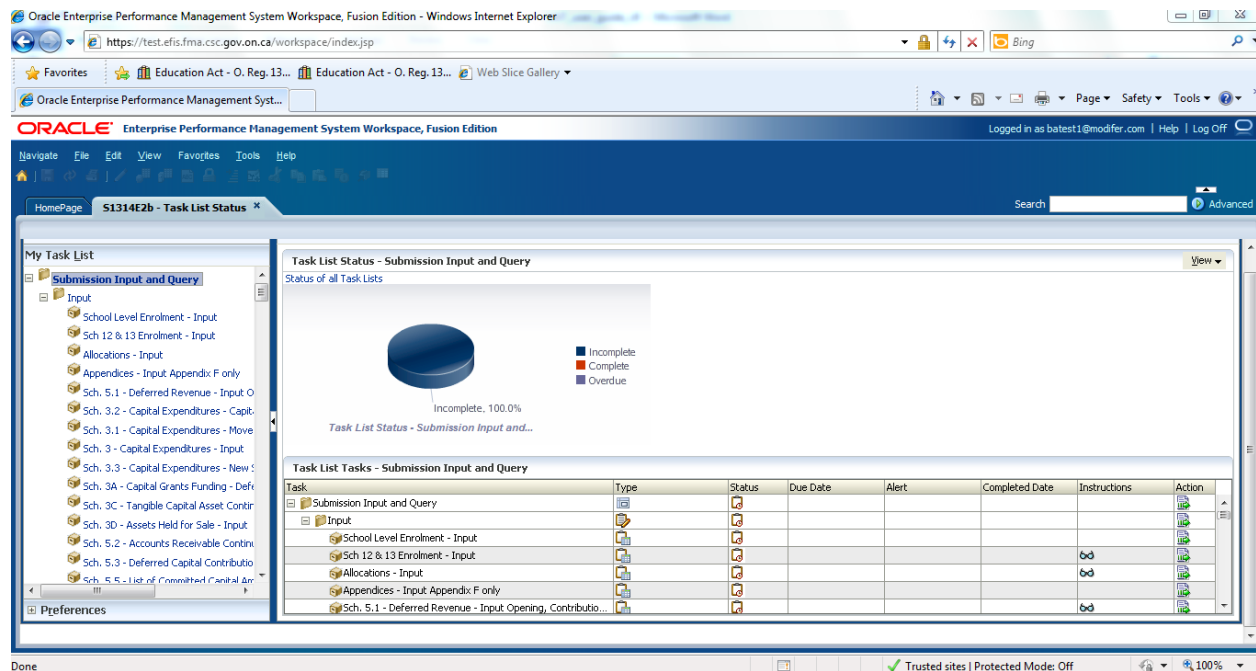
Black arrow points to an example of the folder Icon and the Red arrow points to an example of the Cube Icon.



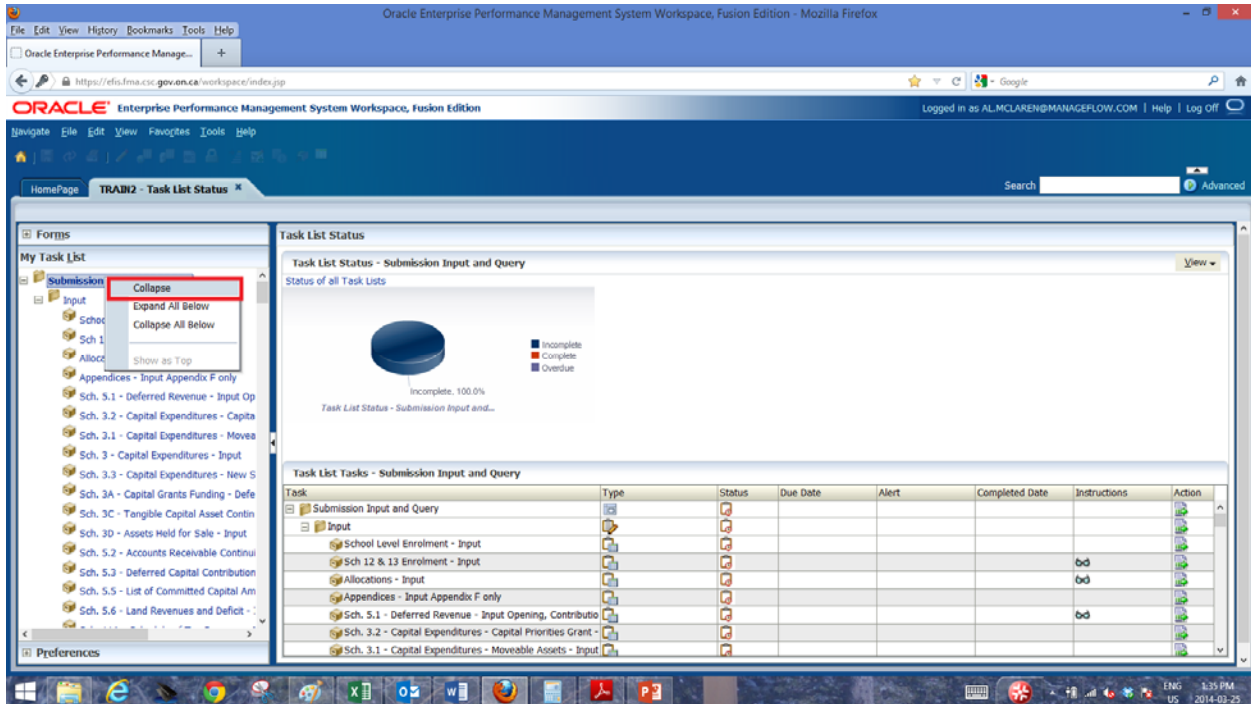
Example of right clicking on a folder and selecting **Expand** will drill down the selected item to the next level.



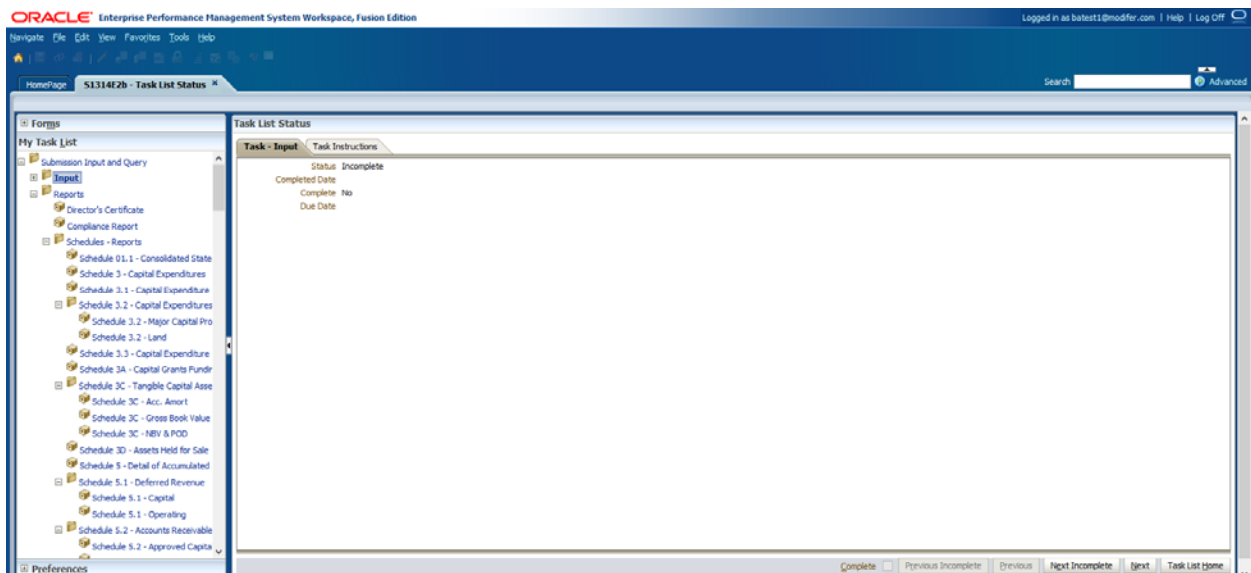
Example of right clicking on a folder and selecting **Expand All Below** will drill down the selected item to the next level.



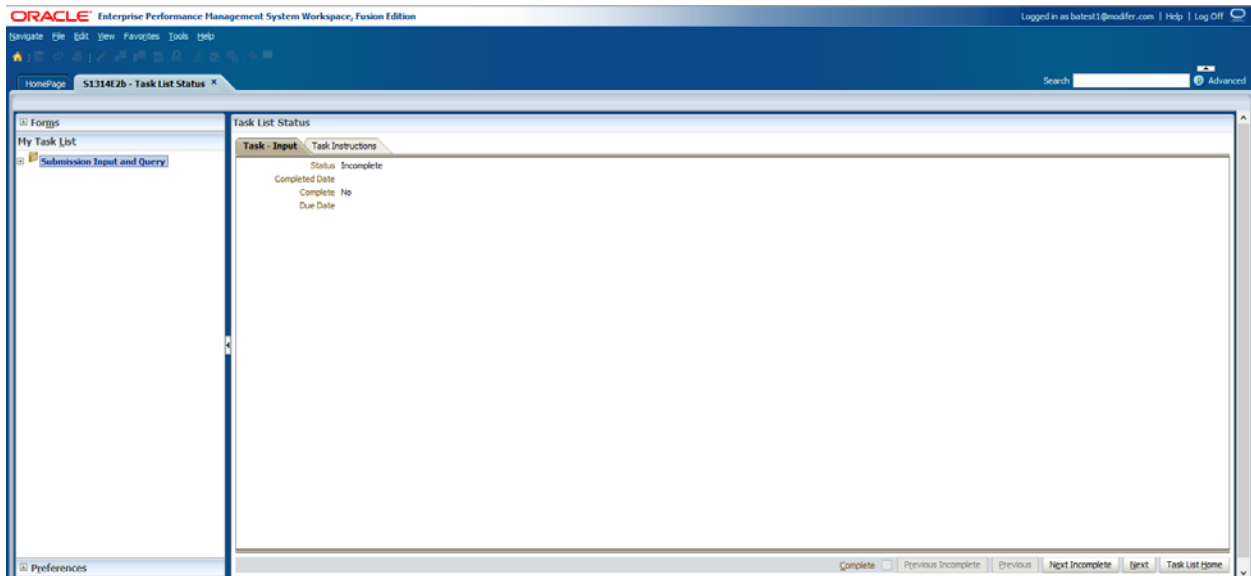
Right clicking on an expanded folder in the Task List and clicking **Collapse** or the - box next to the folder to collapse one level or click **Collapse All Below** will hide all of the levels below the selected folder.



Example of selecting **Collapse**.



Example of selecting ***Collapse All***



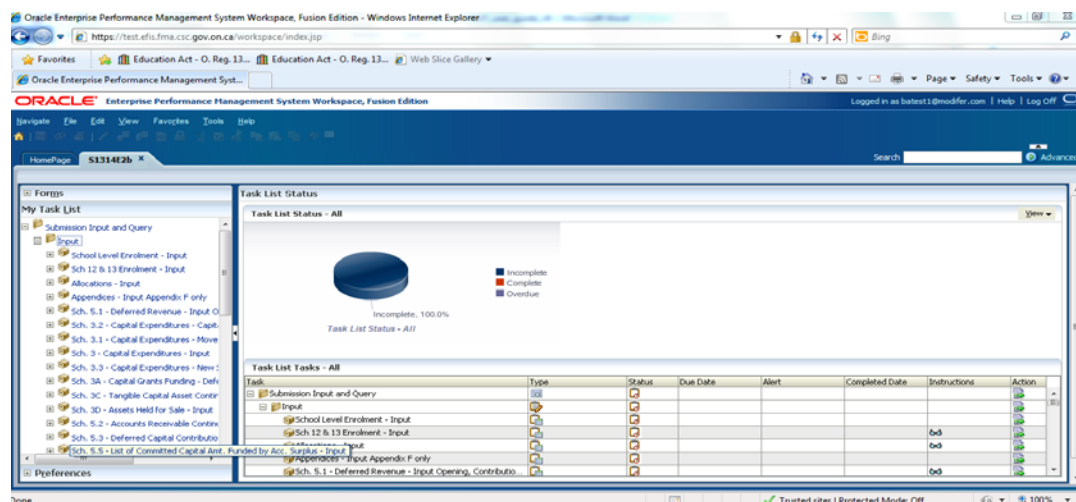
4.3 How to Navigate in Planning using Task List

To drill down to any form in EFIS 2.0 Task List click on the Expand icon (+) next to desired Task List. A list of folders/cubes for each area will be displayed. The Input folder contains all the data input forms. The Reports folder contains reports for all Schedules, Allocation (Sections) and other Efis2.0 reports. The Results folder contains a set of forms that displays the calculation results for all Schedules, Allocation (Sections) and other Efis2.0 reports. The Reference Data folder contains all Benchmarks, Table Amounts as well as Summary of Reference Data Changes and Reference Data Variance Report and Results. The Validation Formats folder contains valid data formats for all input forms. The Submission Management folder contains tasks related to validation and promotion of the submission.

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The browser address bar indicates the URL: https://test.efis.fma.csc.gov.on.ca/workspace/index.jsp. The page title is 'Oracle Enterprise Performance Management System Workspace, Fusion Edition'. The user is logged in as batest1@modfcr.com. The interface features a 'Forms' sidebar on the left with a 'My Task List' tree. The main content area is titled 'Task List Status - All' and contains a pie chart showing 'Incomplete, 100.0%'. Below the chart is a table titled 'Task List Tasks - All' with the following columns: Task, Type, Status, Due Date, Alert, Completed Date, Instructions, and Action. The table lists several tasks, including 'Submission Input and Query', 'Input', 'School Level Enrolment - Input', 'Sch 12 & 13 Enrolment - Input', 'Allocations - Input', 'Appendices - Input Appendix F only', and 'Sch. 5.1 - Deferred Revenue - Input Opening, Contributio...'. The status of all tasks is 'Incomplete'.

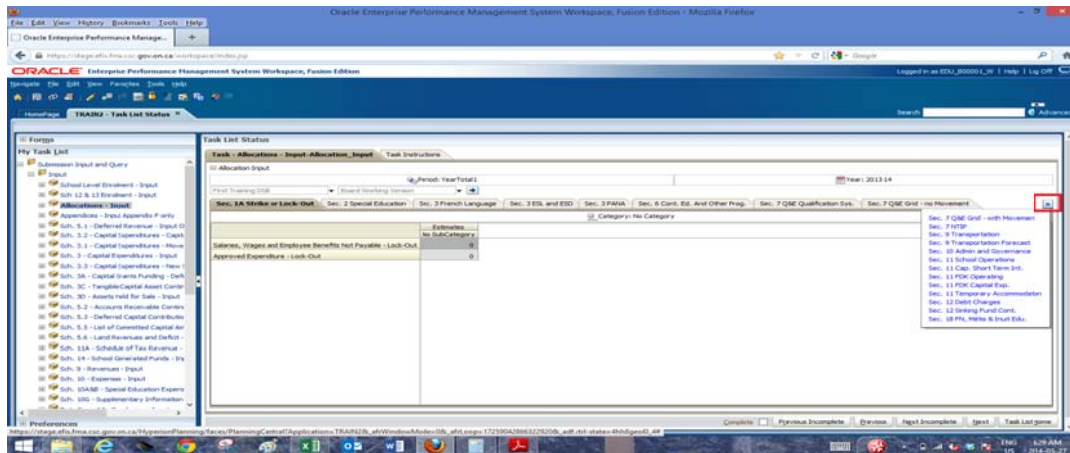
4.3.1 Input Data Navigation

All data input forms are contained in the Input folder and are listed in the suggested order of data entry. To access the individual forms **expand** the Input folder.





In a complex input form, due to screen resolution sometimes you will not be able to see all of the forms listed in the tab. To see all of the forms click on the arrow to the right and select the form. Also if the list after clicking on the arrow is long, you need to select last form and then click on the arrow again to see the rest of the forms. See the example above.



4.3.1.1 School Level Data Navigation – Input

To access the data input form for School Level Data- Input (formerly Appendix C) expand on the Input folder. In EFIS 2.0 school level data entry is now integrated into the application. Shown below is the School Level Data input form with a tab for Elementary and one for Secondary.

The screenshot displays the Oracle Enterprise Performance Management System Workspace. The main window is titled "Statut de liste des tâches" and shows the "School Level Enrollment" form. The form includes a navigation pane on the left with a tree view of tasks, a main data entry area with tabs for "Elementary" and "Secondary", and a table displaying enrollment data for various schools. The table columns include school names, IDs, and enrollment figures for different categories like "Adjusted On The Ground Capacity Per 5", "October Enrolment", and "Full-Time Equivalent".

School Name	School ID	Elementary		Secondary		Estimates						
		Adjusted On The Ground Capacity Per 5				October Enrolment			Full-Time Equivalent			
		No Category	Elementary	Junior Kindergarten (JK)	Senior Kindergarten (SK)	Grades 1 to 3	Grades 4 to 8	Total Elementary	Junior Kindergarten (JK)	Senior Kindergarten (SK)	Grades 1 to 3	March Enrolment
Alexander Henry HS (Elem/Devlpmntl Ed) (B5891240-F1)	50200044		27			15.5	47	93	155.5	0	0	0
Anna McCrea PS (B5019186-F00078)	50200008		359			6	19	20	45	1	0	1
Arthur Henderson - A PS (B5067679-F02930)	50200053		127			3	10	11	24	0	0	0
Arthur Henderson PS (B5067679-F00271)	50200053		161			7	22	41	70	0.5	0	0.9
Aweres 1 PS (B5028932-F00144)	50200009		332							0.5	0	0.9
Bay View PS (B5035041-F00141)	50200010		205			15	67	126	208	0	0	0
Ben R McMullin PS (B5043362-F00174)	50200011		297			12	47	80	139	1	0.1	1
Blind River PS (B5054542-F00206)	50200012		482					155	155	1	0.1	1
Central Algoma SS (Intermediate) (B5137967-F24241)	50200045		193	2		11	47	110	170	2.1	0.5	0
Central Avenue PS (B5093548-F00379)	50200013		331			6	18	51	75	1	0.1	1
Chapleau Public School (B5101214-F07611)	50200052		340			33.5	60	55	148.5	0.5	0.1	0.9
East View PS (B5161276-F00682)	50200015		317			25.5	66	67	158.5	1	0.5	1
Echo Bay Central PS (B5165042-F00698)	50200016		187			14.5	63	59	136.5	1	0.1	0.9
Elien Park Public School (B5165073-F00589)	50200014		230			9	20	12	41	0.8	0	0.9
Elsene Brule PS (B5186903-F00754)	50200017		404							1	0	1
FH Clergue French Immersion (B5202614-F14222)	50200019		738			21	76	79	176	1	0.1	1
Francis H Clergue PS (B5202614-F00848)	50200019		331			14.5	74	138	226.5	0	0	0
Grandview PS (B5227331-F00955)	50200021		248			10.5	51	89	150.5	1	0.1	1
Greenwood PS (B5230561-F00695)	50200022		283			18.5	66	125	209.5	1	0	0.9
H M Robbins PS (B5237191-F00993)	50200023		257			4.5	18	26	48.5	1	0.1	1
Homepayne Jk-12 School (Elementary) (B5264750-F1449)	50200058		138							0.5	0.1	0.9
Iron Bridge PS (B5277896-F01151)	50200024		208			12.5	30	38	80.5	1	0	0.9
Isabel Fletcher PS (B5278270-F01156)	50200025		262			10.5	33	40	83.5	0.5	0	0.9
Total Facility	Total School It		11651	2		557.5	1691	3142	5392.5	31.30	4.60	32.80

4.3.1.2 Board Level Enrolment Navigation- Input

Board level enrolment information is input in Sch12-13 Enrolment-Input. An example of the board level data input form follows:

The screenshot shows the Oracle Enterprise Performance Management System Workspace. The main window displays the 'Board Level Enrolment Input' form. The form includes a navigation pane on the left with a tree view of tasks, and a main data entry area. The data area contains a table with the following structure:

		Estimates			
		Number of Full-Time Pupils	Number of Part-Time Pupils	FTE of Part-Time Pupils	Full-Time Equivalent
October Enrolment	Junior Kindergarten (JK)			2	2
October Enrolment	Senior Kindergarten (SK)	300		332.5	632.5
October Enrolment	Grades 1 to 3	1000		973	1973
October Enrolment	Grades 4 to 8	1000		2592	3592
October Enrolment	Total Elementary	2300		3899.5	6199.5
October Enrolment	Elementary (21 years and over)	123	123	100	223
October Enrolment	Grades 9 to 12	2000		2590	4590
October Enrolment	Grades 9 to 12 (21 years and over)	123	123	100	223
March Enrolment	Junior Kindergarten (JK)	20		14.4000	34.4000
March Enrolment	Senior Kindergarten (SK)	1		4.0000	5.0000
March Enrolment	Grades 1 to 3	18		18.6000	36.6000
March Enrolment	Grades 4 to 8	1		3	4
March Enrolment	Total Elementary	40		40	80
March Enrolment	Elementary (21 years and over)	321	321	200	521

4.3.1.3 Allocation (Sections) Navigation- Input

The Allocation (Sections)- Input folder contains a single data input form with individual tabs for each of the sections that require data input. In addition to the white data entry cells, prior year data cells have a blue background and can be updated and saved by the user. Gray cells are calculated or empty cells and cannot be updated by the user.

The screenshot shows the Oracle Enterprise Performance Management System Workspace. The main window displays the 'Task List Status' for 'Task - Allocations - Input-Allocation_Input'. The 'Allocation Input' form is open, showing a table with columns for Section, Category, and Amount. The '2012-13 High Needs Allocation before enrolment change adjustment' row is highlighted in blue, indicating it is a prior year value. Other rows show calculated values for Elementary and Secondary levels.

Section	Category	Amount
Elementary	SEA Claim Based Amount	100
Elementary	Approved SIP	200
Elementary	Salary and Supplies in Approved Facilities	277,027
Elementary	Furniture and Equipment in Approved Facilities	0
Elementary	Approved Costs for Facilities Amount	0
Secondary	SEA Claim Based Amount	6,000
Secondary	Approved SIP	0
Secondary	Salary and Supplies in Approved Facilities	539,405
Secondary	Furniture and Equipment in Approved Facilities	0
Secondary	Approved Costs for Facilities Amount	0
Total Day School, 2012-13 High Needs Allocation before enrolment change adjustment		6,158,761
Elementary	Total HNA Excluding SIP	6,905,575
Secondary	Total HNA Excluding SIP	532,300

4.3.1.4 Schedules Navigation- Input

Each Schedule that requires data input has its own data input form, the example below is for Schedule 5.1. In this example there is one tab for operating and one tab for capital.

The screenshot displays the Oracle Enterprise Performance Management System Workspace. The main window shows the 'Task List Status' for 'Sch. 5.1 - Deferred Revenue - Input'. The interface is split into two tabs: 'Operating' and 'Capital'. The 'Capital' tab is currently selected, showing a table of financial data. The table has the following columns: Description, Deferred Revenue - Balance at September 1, Deferred Revenue - Contributions Received, Deferred Revenue - Earnings on Deferred Revenue, and Deferred Revenue - Transferred to DCC (Related to Prior Year E). The data is organized into sections: LEGISLATIVE GRANTS and OTHER MINISTRY OF EDUCATION GRANTS. The table shows various line items with their respective financial values.

Description	Deferred Revenue - Balance at September 1	Deferred Revenue - Contributions Received	Deferred Revenue - Earnings on Deferred Revenue	Deferred Revenue - Transferred to DCC (Related to Prior Year E)
LEGISLATIVE GRANTS				
Minor Tangible Capital Assets		2,952,097	0	
School Renewal	1,882,334	3,159,993	0	
Interest on Capital		3,618,997	0	
Temporary Accommodation		0		
School Condition Improvement	2,337,307	1,864,734	0	
Internal Audit - Capital	0	0	0	
Green Schools Pilot - Capital	0	0	0	
Retrofitting School Space for Child Care	0	0	0	
Legislative Grants - Capital	4,219,641	11,595,821	0	
OTHER MINISTRY OF EDUCATION GRANTS				
Improved Access for Special Education	0	0	0	
Energy Efficient Schools - Capital	0	0	0	
Renewable Energy - Capital	0	0	0	
Other Ministry of Education Grant - Capital 1	0	0	0	
Other Ministry of Education Grant - Capital 2	0	0	0	
Other Ministry of Education Grant - Capital 3	0	0	0	

4.3.1.5 Data Forms Navigation- Input

Data Forms B, C, D have been consolidated into one data entry form with multiple tabs, Data Form A2 – Enveloping is a separate form.

Example of Data Form B, C, D input form:

The screenshot displays the Oracle Enterprise Performance Management System workspace. The main window shows the 'Task List Status' for 'Data Form B, C, D - Input-OF_B,C,D_Input'. The data table is organized by sub-category, with 'OPERATING CLASSROOM' being the primary category. The table includes columns for 'Total Allocations to Expense', 'Transfer to Deferred Revenues - Minor TCA', 'Deferred Capital Contribution', 'Transfer to Deferred Revenue - Operating Legislative Grant', and 'Transfer from Deferred Revenues - Minor TCA'. The data is presented for the year 2013-14.

Example of Data Form A2

The screenshot displays the Oracle Enterprise Performance Management System workspace. The main window shows the 'Task List Status' for 'Data Form A2 - Enveloping - Input-OF_A2_Input'. The data table is organized by sub-category, with 'SPECIAL EDUCATION ENVELOPE' being the primary category. The table includes columns for 'No SubCategory', 'JK - Grade 3', 'Grades 4 to 8', and 'Secondary'. The data is presented for the year 2013-14.

4.3.1.6 Appendices Navigation- Input

Most of the appendices have been consolidated into one data entry form with multiple tabs. Appendix F is a separate input form for the boards that need to input Daily and Weekly transportation.

Example of Appendices input form:

The screenshot displays the Oracle Enterprise Performance Management System Workspace interface. The main window shows the 'Task List Status' for the task 'Appendices - Input'. The 'Estimates' tab is active, showing a table with columns for 'Code of Accounts Reference', 'Elementary', 'Secondary', 'Total Regular Program Staffing', 'Spec. Ed. Elementary', 'Spec. Ed. Secondary', and 'Total Day School Programs Staffing'. The table lists various staff categories under 'CLASSROOM INSTRUCTION' and 'TEACHER ASSISTANTS AND EARLY CHILDHOOD EDUCATORS'.

Code of Accounts Reference	Elementary	Secondary	Total Regular Program Staffing	Spec. Ed. Elementary	Spec. Ed. Secondary	Total Day School Programs Staffing
CLASSROOM INSTRUCTION						
10-170*	226.4	221.3	447.7	34.4	30	512.1
10-170*	61.6	4.6	56.1			56.1
10-171,173,192						
10-170*	1		1	0		1
10-170*	1		1	0		1
10-170*	1		1	0		1
10-170*	3		3	0		3
10-170*	18.8		18.8	0		18.8
10-170*	2.3		2.3	2		4.3
-		0	0			0
10-171,173,192	16	0	16	5.1	10.7	31.8
10-151	2.4	0	2.4	1.8	0	4.2
10-152	12.2	1.3	13.5	9.9	0	23.4
10-170 (205)				3	5.8	8.8
Total Classroom Instruction Staff	229.7	227.1	456.8	56.2	46.5	665.5
TEACHER ASSISTANTS AND EARLY CHILDHOOD EDUCATORS						

Example of Appendix F

The screenshot displays the Oracle Enterprise Performance Management System Workspace interface. The main window shows the 'Task List Status' for the task 'Appendices - Input Appendix F Daily Transportation'. The 'Estimates' tab is active, showing a table with columns for 'School', 'Transportation Type', 'Prior Year Number of Pupils', 'Prior Year Transportation Expenses', 'Number of Pupils', and 'Transportation Expenses'. The table lists transportation expenses for various schools, including Roberts School, E.C. Drury, Sir James Whitney, Centre Jules Leger, W. Ross MacDonald, Trillium School, Amethyst School, and Sigonaka School.

School	Transportation Type	Prior Year Number of Pupils	Prior Year Transportation Expenses	Number of Pupils	Transportation Expenses
Roberts School	Daily Transportation	0	0	0	0
Roberts School	Board & Lodging	0	0	0	0
Roberts School	Other Provincial Schools Transportation Expenses	0	0	0	0
E.C. Drury	Daily Transportation	0	0	0	0
E.C. Drury	Board & Lodging	0	0	0	0
E.C. Drury	Other Provincial Schools Transportation Expenses	0	0	0	0
Sir James Whitney	Daily Transportation	0	0	0	0
Sir James Whitney	Board & Lodging	0	0	0	0
Sir James Whitney	Other Provincial Schools Transportation Expenses	0	0	0	0
Centre Jules Leger	Daily Transportation	0	0	0	0
Centre Jules Leger	Board & Lodging	0	0	0	0
Centre Jules Leger	Other Provincial Schools Transportation Expenses	0	0	0	0
W. Ross MacDonald	Daily Transportation	0	0	0	0
W. Ross MacDonald	Board & Lodging	0	0	0	0
W. Ross MacDonald	Other Provincial Schools Transportation Expenses	0	0	0	0
Trillium School	Daily Transportation	0	0	0	0
Trillium School	Board & Lodging	0	0	0	0
Trillium School	Other Provincial Schools Transportation Expenses	0	0	0	0
Amethyst School	Daily Transportation	0	0	0	0
Amethyst School	Board & Lodging	0	0	0	0
Amethyst School	Other Provincial Schools Transportation Expenses	0	0	0	0
Sigonaka School	Daily Transportation	0	0	0	0

4.3.1.7 Errors and Warnings Navigation- Input

The Errors and Warnings have been separated into 2 input forms; however the results remain one form with 2 tabs. The new Warnings Explanation – Input form is where the boards now enter an explanation for any warning that message that has a “Yes” value. This has replaced the external excel report. A new warning has also been added that will not allow the submission to be submitted until all explanations been entered.

Example of Warning Explanation Form

Warning ID	Value1	Value2	Warning?	Warning Explanation
Warning_SC3A_3	0	0	No / Non	
Warning_SC3A_4	0	0	No / Non	
Warning_SC3A_5	0	0	No / Non	
Warning_SC3A_6	200	0	Yes / Out	Enter Warning explanation here
Warning_SC3A_7	(200)	0	No / Non	
Warning_SC3A_8	0	0	No / Non	
Warning_SC3A_9	0	0	No / Non	
Warning_SC3A_10	0	0	No / Non	
Warning_SC3A_11	0	0	No / Non	
Warning_SC3A_12	0	0	No / Non	
Warning_SC3A_13	0	0	No / Non	
Warning_SC3A_14	0	0	No / Non	
Warning_SC3A_15	0	0	No / Non	
Warning_SC3A_16	0	0	No / Non	
Warning_SC3A_17	1,864,734	1,864,734	No / Non	
Warning_SC3A_18	0	0	No / Non	
Warning_SC3A_19	0	0	No / Non	
Warning_SC3A_20	0	0	No / Non	

A new Board Error Confirmation form that allows the boards to submit with outstanding errors as part of the Submit with Errors process has been added. This functionality is only used after consulting the Ministry. Warnings can also be viewed as a tab on this form.

The screenshot displays the Oracle Enterprise Performance Management System Workspace. The main window is titled 'Task List Status' and shows a table of errors and warnings. The table has columns for 'Error?' and 'Board Accepts Error'. A red box highlights the headers for these two columns. A yellow arrow points to a red box on the right edge of the description column, indicating how to expand the cell.

No Category	Value1	Value2	Error?	Board Accepts Error	EW Description - English
			Yes / Out	No / None	Indicates if there is any error in the submission and whether to proceed with submission regardless of error.
Error_SC3A_1	405,172	405,172	No / Non		Schedule 3A Capital Grants or Deferred Revenue Available for current year under Full Day Kindergarten on lines 1.1 and 1.2 should be equal to Section 11 Available allocation on line 11.90.9 (For Estimates and Revised Estimates only).
Error_SC3A_3			Yes / Out		Schedule 3A The amounts for Capital grants receivable (land & non-land) for pages 1-2, lines 3.1 and 3.2, Capital Grants Receivable or Application of Deferred Revenue should not be negative
Error_SC3A_4	0	0	No / Non		Schedule 3A POD application of Deferred Revenue for land line 3.1 col.14 should be less than or equal to the sum of transfer to revenues in Schedule 5.1 POD transfer to revenue column 6 lines 2.25 and 2.26
Error_SC3A_5	0	0	No / Non		Schedule 3A POD application of Deferred Revenue for non-land line 3.2 col.14 should be equal to the sum of Schedule 5.1 POD transfer to DCC column 5 lines 2.25 and 2.26
Error_SC3A_6	0	0	No / Non		Schedule 3A Total EDC application of capital deferred revenue on line 3 col. 13 should not exceed total deferred revenues available on line 1.4
Schedule 3A Errors					
Error_SC3C_1			No / Non		Schedule 3C TCA NBV and Proceeds of disposition -Gain/(Loss) on Disposal must equal Proceeds of Disposition minus Disposals (Cost and Accumulated Amortization)
Error_SC3C_2			No / Non		Schedule 3C - Closing balance of TCA cost of one or more asset types should not be negative
Error_SC3C_3			No / Non		Schedule 3C - Closing balance of TCA accumulated amortization of one or more asset types should not be negative
Error_SC3C_4			No / Non		Schedule 3C - Total for Cost- Transfers to/from CIP should be 0
Error_SC3C_5			No / Non		Schedule 3C, Gross Book Value, the Cost- Transfers between Asset Class column should be 0.
Error_SC3C_6			No / Non		Schedule 3C, Accumulated Amortization, the transfer between asset class column should be 0.
Error_SC3C_8	6,165,023	6,165,023	No / Non		Schedule 3C - TCA Gross Book Value - Cost -Additions and Betterments Total should be equal to Schedule 3 - Capital Expenditure with Capitalized Interest (Line 1.4 + Line 1.7)
Schedule 3C Errors					

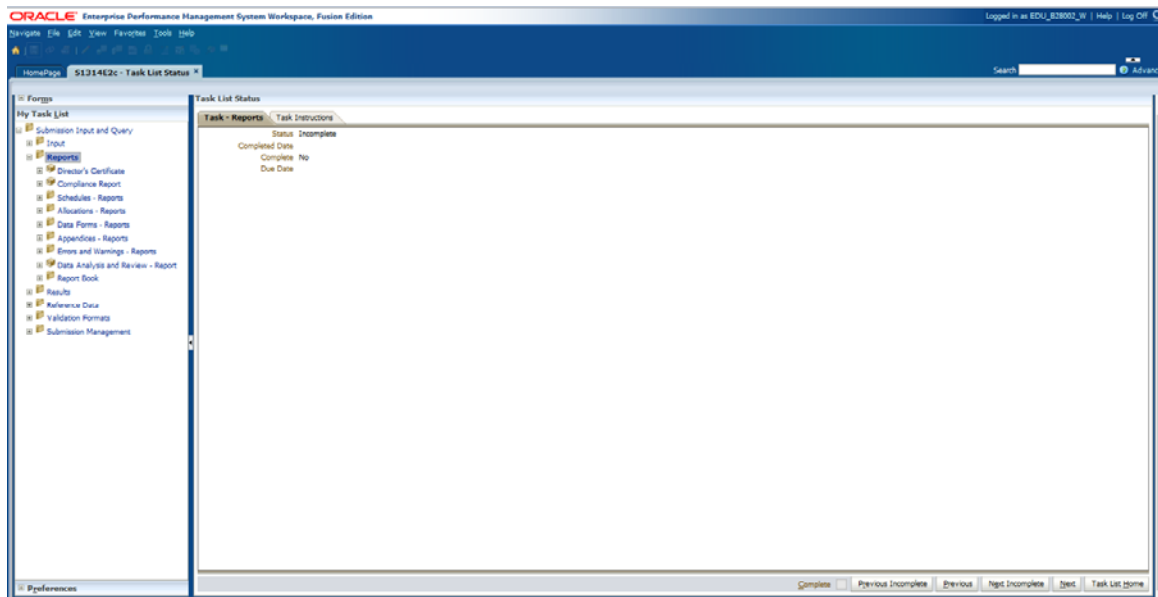


To view the complete description position the mouse pointer on the edge of the description cell and drag the cell to expand. See arrow above

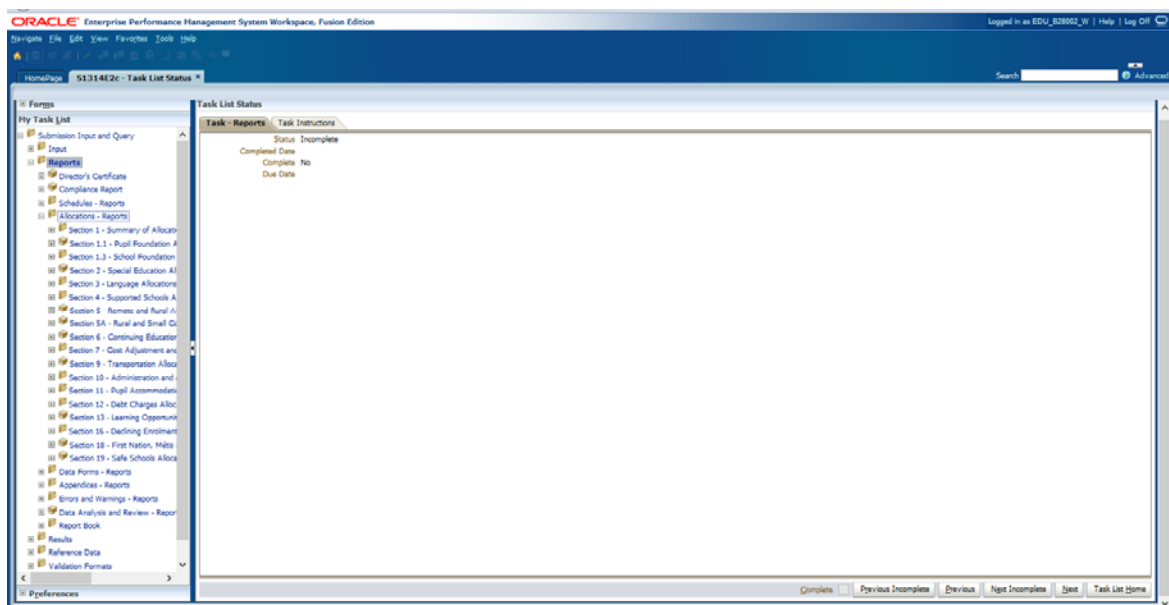
4.3.2 Reports Data Navigation

Reports displaying the input and results for each form are found under the **Reports** folder. Reports have been grouped into folders by the following areas: Directors Report, Compliance Report, Schedules, Allocations (Sections), Data Forms, Appendices, Errors and Warnings and Data Analysis and Review. To print a complete set of reports the user will select the Report Book folder.

Example of the Report Area folders



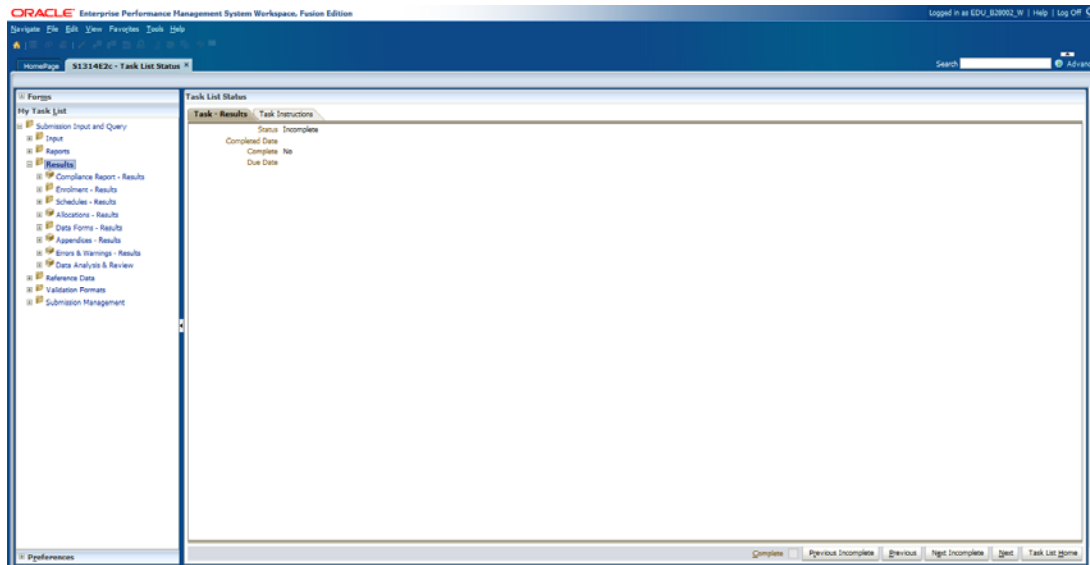
Example of the Allocation (Sections)- Reports folders



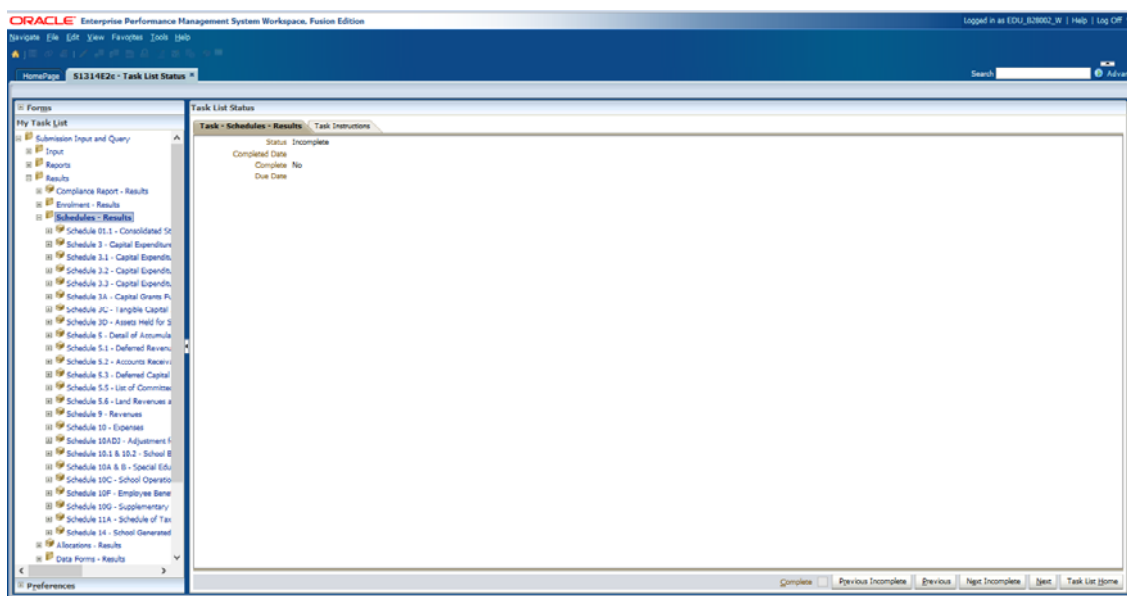
4.3.3 Results Data Navigation

Results can also be viewed in a form; the **Results** folder contains these forms. Review forms have been grouped into folders by the following areas: Compliance Report, Enrolment, Schedules, Allocations (Sections) , Data Forms, Appendices, Errors and Warnings and Data Analysis and Review.

Example of Results Area folders.



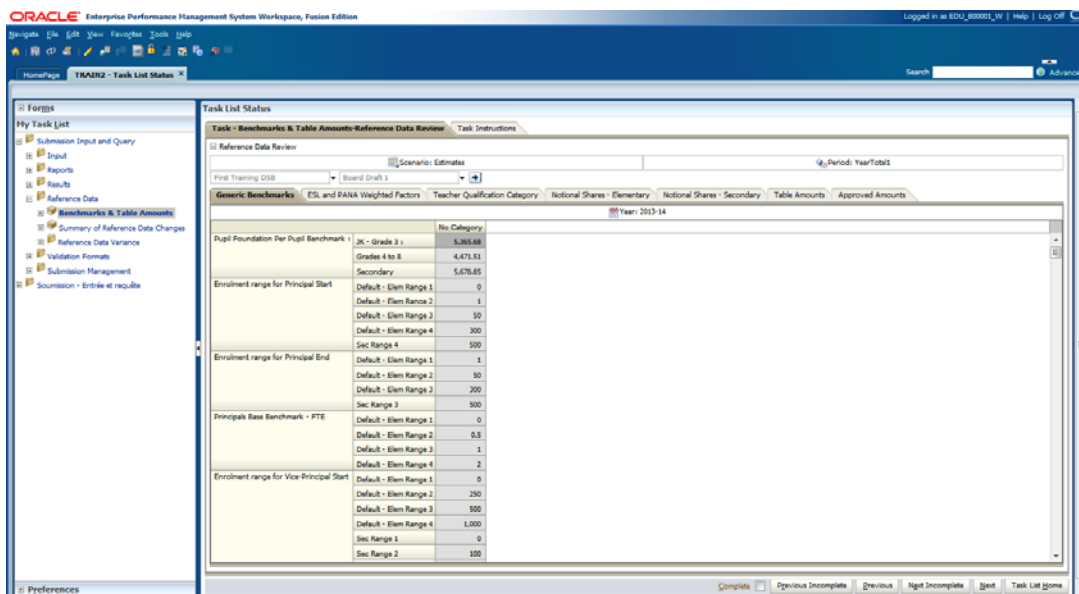
Example of Schedule Results folders



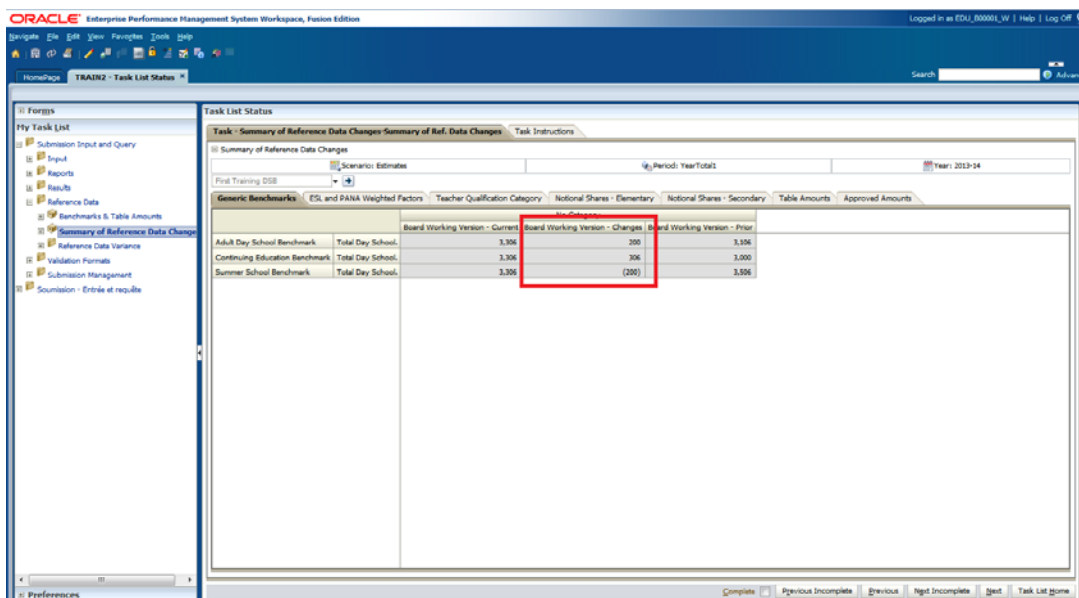
4.3.4 Reference Data Navigation

The **Reference Data** folder contains forms that display **Benchmarks & Table Amounts** of the board, a **Summary of Reference Data Changes** that most recently have occurred during a submission cycle and a **Reference Data Variance Report** that displays the impact of that change on Allocations (Sections) in a form. A PDF report is also available.

Example of the Benchmark tab



Example of Benchmark Changes



Example of Variance Report Form

SubCategory	No Category	No Category	No Category
Board Working Version	Board Working Version - Changes	Board Working Version Snapshot (Before Data Change)	
Pupil Foundation Allocation	46,046,026		46,046,026
School Foundation Allocation	9,486,726	9,486,726	0
Special Education Allocation	15,173,757		15,173,757
Language Allocation	1,342,951		1,342,951
Supported School Allocation	3,262,647	3,262,647	
Remote and Rural Allocation	6,620,444		6,620,444
Rural and Small Community Allocation	20,664		20,664
Learning Opportunities Allocation	2,041,929		2,041,929
Continuing Education Allocation and Other Program	673,692	45,640	628,051
Cost Adjustment and Teacher Qualification Allocation	7,748,979		7,748,979
New Teacher Induction Program Allocation	80,564		80,564
Restraint Savings Allocation	(112,150)		(112,150)
Transportation Allocation	7,832,630		7,832,630
Administration and Governance Allocation	4,047,192	21,750	4,025,442
School Operations Allocation	12,664,233	4,358,017	8,306,216
Community Use of Schools Allocation	188,321		188,321
Declining Enrolment Adjustment	876,152	(177,583)	1,053,735
First Nations, Metis and Inuit Supplemental Allocation	1,005,181	0	1,005,181
Safe Schools Allocation	284,542		284,542
Permanent Financing of NPF	0		0
General Operating Allocation (Prior to Capital Adjustment)	119,284,480	16,997,197	102,287,283

Example of PDF Variance Report

School Board Name: First Training DSB
School Year: 2013-14
Cycle: Estimates

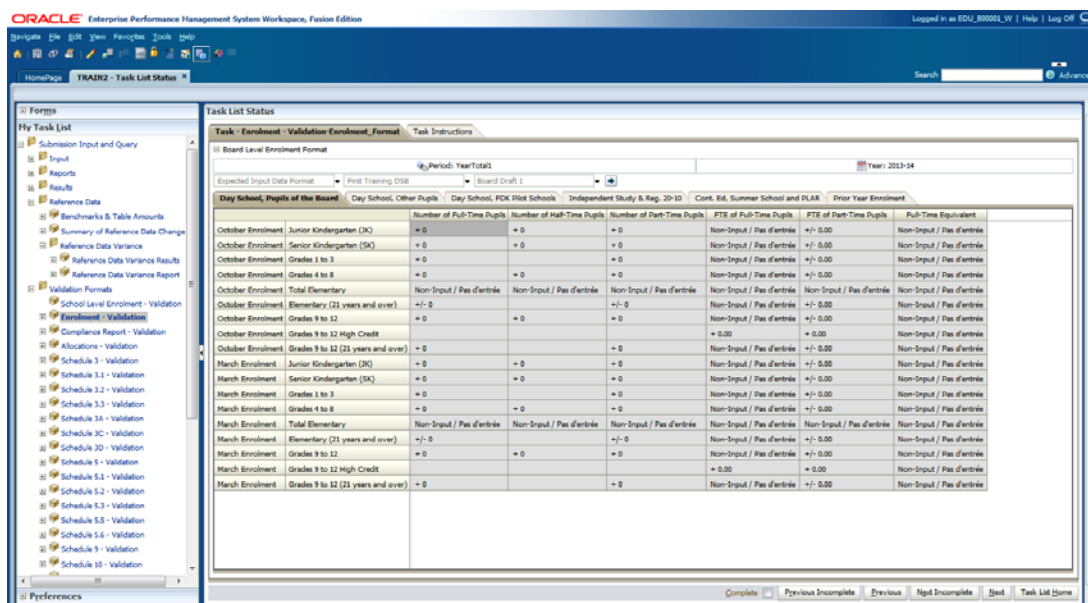
Reference Data Variance

The following report shows the changes to Allocations after Reference Data Versioning has been completed and Allocations Calculations have been re-run using the changed Reference Data.

	Board Working Version Current	Board Working Version Changes	Board Working Version Prior
Pupil Foundation Allocation	46,046,026	-	46,046,026
School Foundation Allocation	9,486,726	9,486,726	0
Special Education Allocation	15,173,757	-	15,173,757
Language Allocation	1,342,951	-	1,342,951
Supported School Allocation	3,262,647	3,262,647	-
Remote and Rural Allocation	6,620,444	-	6,620,444
Rural and Small Community Allocation	20,664	-	20,664
Learning Opportunities Allocation	2,041,929	-	2,041,929
Continuing Education Allocation and Other Program	673,692	45,640	628,051
Cost Adjustment and Teacher Qualification Allocation	7,748,979	-	7,748,979
New Teacher Induction Program Allocation	80,564	-	80,564
Restraint Savings Allocation	-112,150	-	-112,150
Transportation Allocation	7,832,630	-	7,832,630
Administration and Governance Allocation	4,047,192	21,750	4,025,442
School Operations Allocation	12,664,233	4,358,017	8,306,216
Community Use of Schools Allocation	188,321	-	188,321
Declining Enrolment Adjustment	876,152	-177,583	1,053,735
First Nations, Metis and Inuit Supplemental Allocation	1,005,181	0	1,005,181
Safe Schools Allocation	284,542	-	284,542
Permanent Financing of NPF	0	-	0
General Operating Allocation (Prior to Capital Adjustment)	119,284,480	16,997,197	102,287,283

4.3.5 Validation Formats Navigation

Each of the input cells requires valid data formats to be entered before the data will be saved to the system, the **Validation Formats** folder contains validation forms for each input form.



The chart below provides a listing of all input formats.

Description	Format Code
Non-Input Cell	Blank Cell
Non-Input Cell	Non-Input / Pas d'entrée
All Values, No Decimal	+/- 0
Positive Values, No Decimal	+ 0
Negative, No Decimal	- 0
Positive One Decimal	+ 0.0
Negative One Decimal	- 0.0
One Decimal	+/- 0.0
Positive Two Decimals	+ 0.00
Negative Two Decimals	- 0.00
Two Decimals	+/- 0.00
Positive Three Decimals	+ 0.000
Negative Three Decimals	- 0.000
Three Decimals	+/- 0.000
Positive Four Decimals	+ 0.0000
Negative Four Decimals	- 0.0000
Four Decimals	+/- 0.0000
Positive Five Decimals	+ 0.00000
Negative Five Decimals	- 0.00000
Five Decimals	+/- 0.00000
Positive Six Decimals	+ 0.000000
Negative Six Decimals	- 0.000000
Six Decimals	+/- 0.000000

4.3.6 Submission Management Navigation

The **Submission Management** folder contains tasks used to perform Version Management submission and promotion activities (promotion of the Board working version). The Version **Description and Summary** form is where the boards can enter a description for the version user is working on as well as follow the activities on different version in the application.

Example of the Version Description and Summary form

The screenshot displays the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The user is logged in as EDU_800001_W. The interface shows a navigation pane on the left with a 'My Task List' containing 'Version Description and Summary'. The main area is titled 'Task List Status' and shows a 'Task - Version Description and Summary-Submission Dashboard'. The dashboard includes a 'Task Instructions' section and a table for 'Active Flag' with columns for Submission Status and Activation Date. Below this is a 'Version Description and Summary' section with a table for entering version details, including Version Description and Activation Date. The table lists various versions, including 'V10W:Board Working Version' (Cindy's draft), 'V10001:Board Draft 1' (What # for Sch 3), and 'V10002:Board Draft 2' (Enter Description). The 'Activation Date' column shows '2014/03/26' for the 'V10:Board Active Version'. The table also lists several inactive versions (V10001 to V10009) and active versions (V20:FO Active Version, V10WDC, V10WAC).

4.4 Navigation Using Forms

An alternative way to access forms (Input, Results and Format) without using the Task List is to select **Forms** in the Planning Explorer window, then select the Schedule / Allocation (Sections) in the Form folder window, then select the form the user wants to access. The example below shows how to access the Input form for Schedule 3C. Unlike the Task List, the Input, Results and Format forms are grouped together. Reports cannot be accessed through Forms.

The screenshot displays the Oracle Enterprise Performance Management System Workspace interface. On the left, the 'Forms' folder is expanded, showing a list of forms under 'Schedule 3C, Tableau 3C'. The 'SC03C_Input' form is highlighted. The main window shows the 'SC03C_Input' form, which is a table with columns for 'TCA Gross Book Value', 'TCA Acc. Amort', 'TCA NBV & POD', and several 'Estimates' columns. The table lists various asset categories and their corresponding values.

	Estimates		Estimates		Estimates		Estimates	
	Cost - Opening Balance September 1	Cost - Adjustments to Opening Balance	Cost - Transfers Between Asset Class	Cost - Additions and Betterments	Cost - Disposals			
Assets In Service - Land & Land Improvement with Infinite Lives	624,000	0	0	0	0			
Assets In Service - Land Improvements	10,299,274	0	0	0	0			
Assets In Service - Buildings - 40 years	183,280,379	0	0	0	5,015,023			
Assets In Service - Other Buildings	0	0	0	0	0			
Assets In Service - Portable Structures	507,280	0	0	0	0			
Assets In Service - Moveable Type Assets	5,102,886	0	0	0	270,000			
Total Assets In Service	199,813,819	0	0	0	5,285,023			
Leasehold Improvements - Land Improvements	0	0	0	0	0			
Leasehold Improvements - Buildings	0	0	0	0	0			
Leasehold Improvements - Other	0	0	0	0	0			
Total Leasehold Improvements	0	0	0	0	0			
Asset Permanently Removed From Service - Buildings - 40 years	0	0	0	0	0			
Total Asset Permanently Removed From Service	0	0	0	0	0			
Construction In Progress - Buildings - 40 years	1,204	0	0	0	0			
Construction In Progress - Buildings - 20 years	0	0	0	0	0			
Construction In Progress - Portables	0	0	0	0	0			
Pre-acquisition costs - Land	0	0	0	0	0			
Pre-acquisition costs - Buildings	0	0	0	0	0			
Total Construction In Progress Assets	1,204	0	0	0	0			
Capital Leased Assets - Land	0	0	0	0	0			

5 Data Input

5.1 Data Input – Forms

All data to be entered into EFIS 2.0 is entered using the data input forms. As described above, each section has a form or set of forms for data input. White Cells are data input, Blue Cells are loaded with prior year data that can be updated, Gray Cells are non-input cells and Red Cells indicate a data validation error.

The section below explains how to input data into EFIS 2.0.

5.1.1 Opening a Form

To open a Form in the Task List click on the forms name.

Category	Elementary	Secondary	Total Day School
SEA Claim Based Amount			
Approved SIP			
Salary and Supplies in Approved Facilities			
Furniture and Equipment in Approved Facilities			
Approved Costs for Facilities Amount	0	0	0
Total Day School: 2012-13 High Needs Allocation before enrolment change adjustment			6,158,761
Total HNA Excluding SIP (Elementary)	7,437,883		
Total HNA Excluding SIP (Secondary)		7,437,883	
Total HNA Excluding SIP (Total Day School)			7,437,883

EFIS 2.0 displays the form that applies to the particular task.

The Allocation (Sections) input form is a complex form with one tab per allocation. The Schedule input forms are either a single form (one tab) or a complex form (multiple tabs) depending of the amount of information to be entered.

5.1.2 Enable Input Field

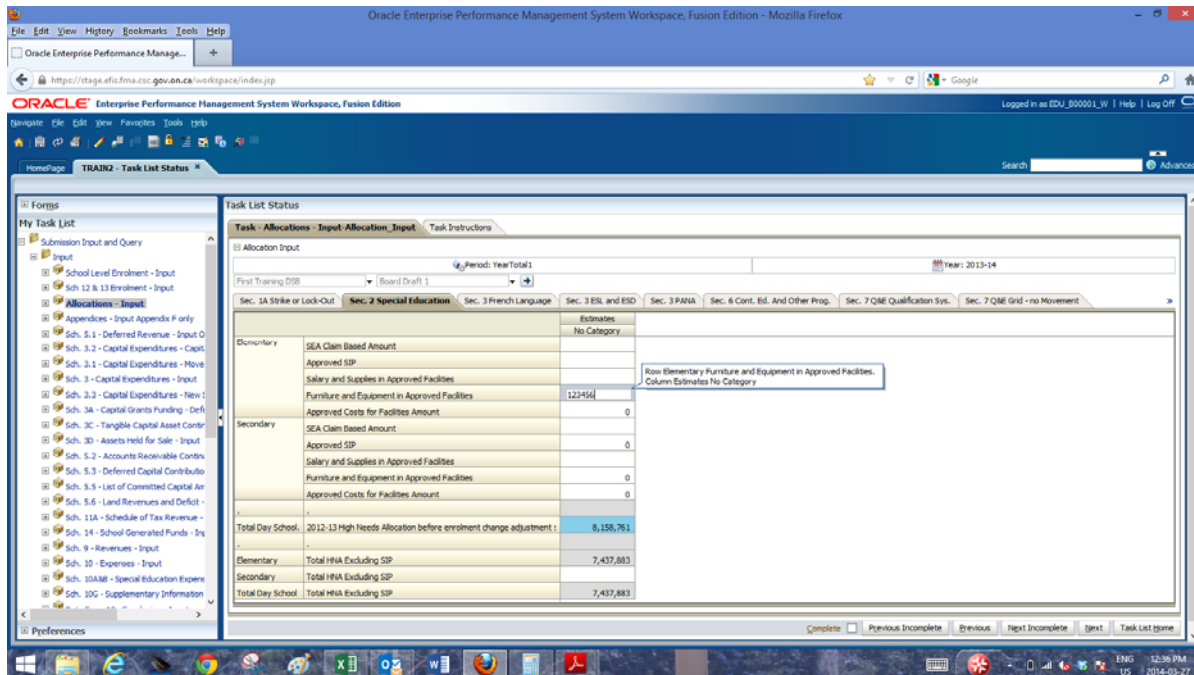
Input fields are displayed with a white background, to enable an input field for input click in the cell. The selected input field is now enabled.

To navigate between cells, in addition to mouse navigation, the keyboard can be utilized:

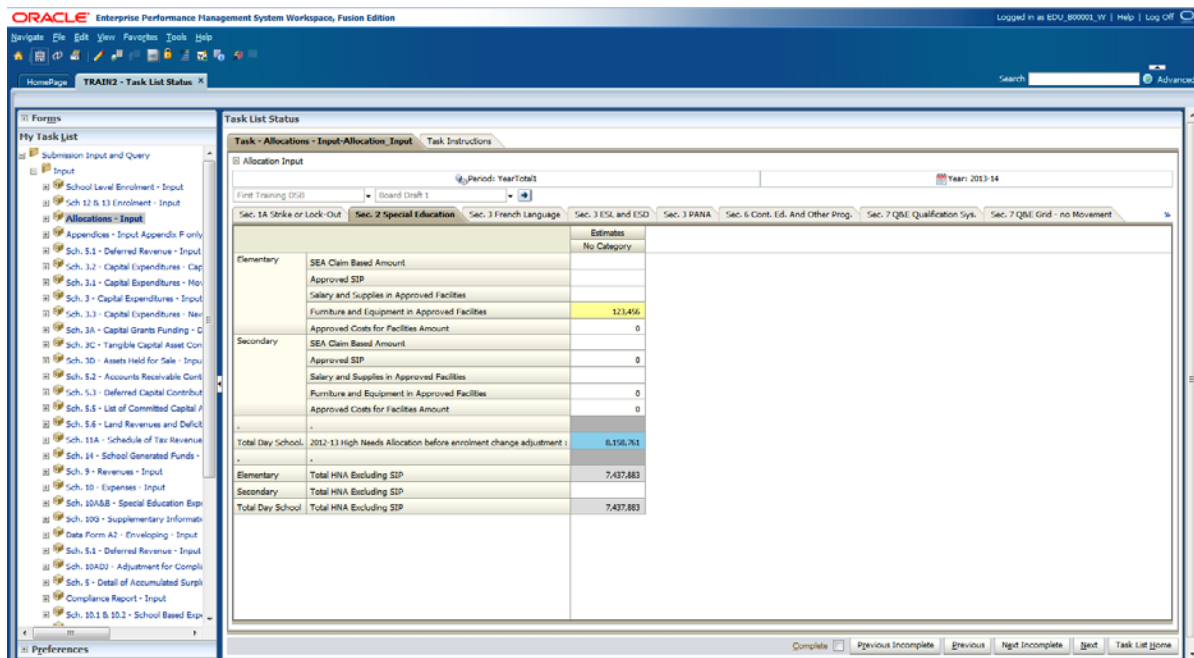
- Tab – move selected cell to next cell in horizontal order
- Shift + Tab – move selected cell backwards, in horizontal order
- Enter – move to the next cell
- Shift Enter – move back to last cell

5.1.3 Key in Input Field

Once an input field is enabled the user can key a value into the cell. A dialog box will be displayed indicating the EFIS 2.0 Cell Coordinates

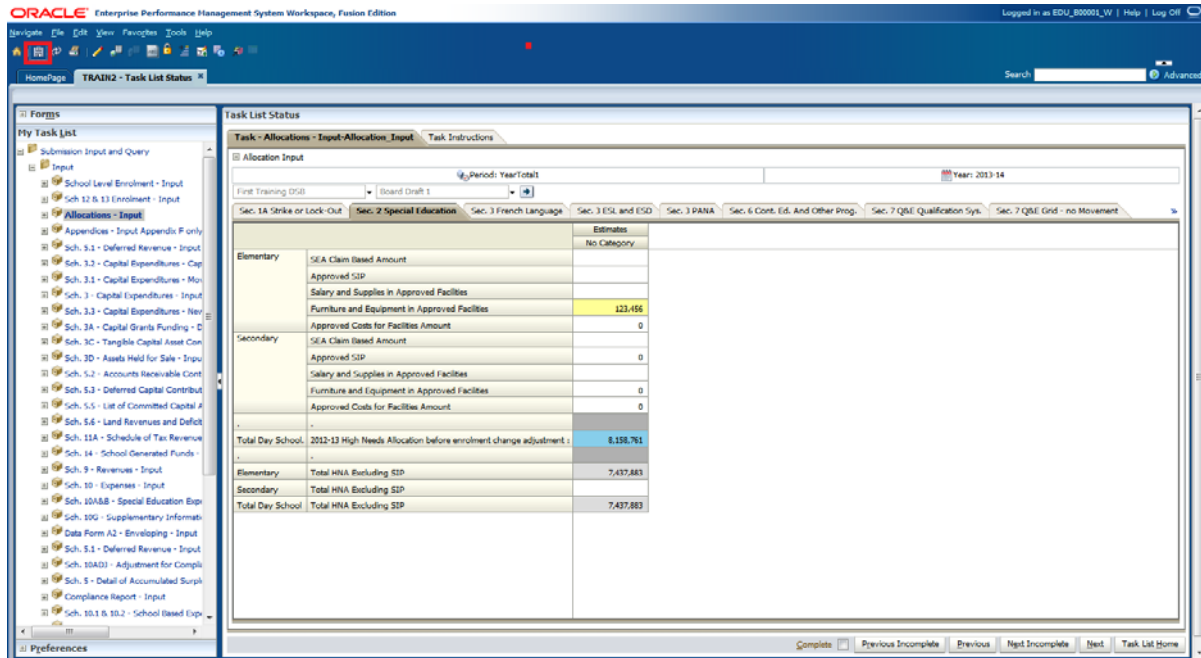


The system highlights input values in yellow until they are saved to the database.

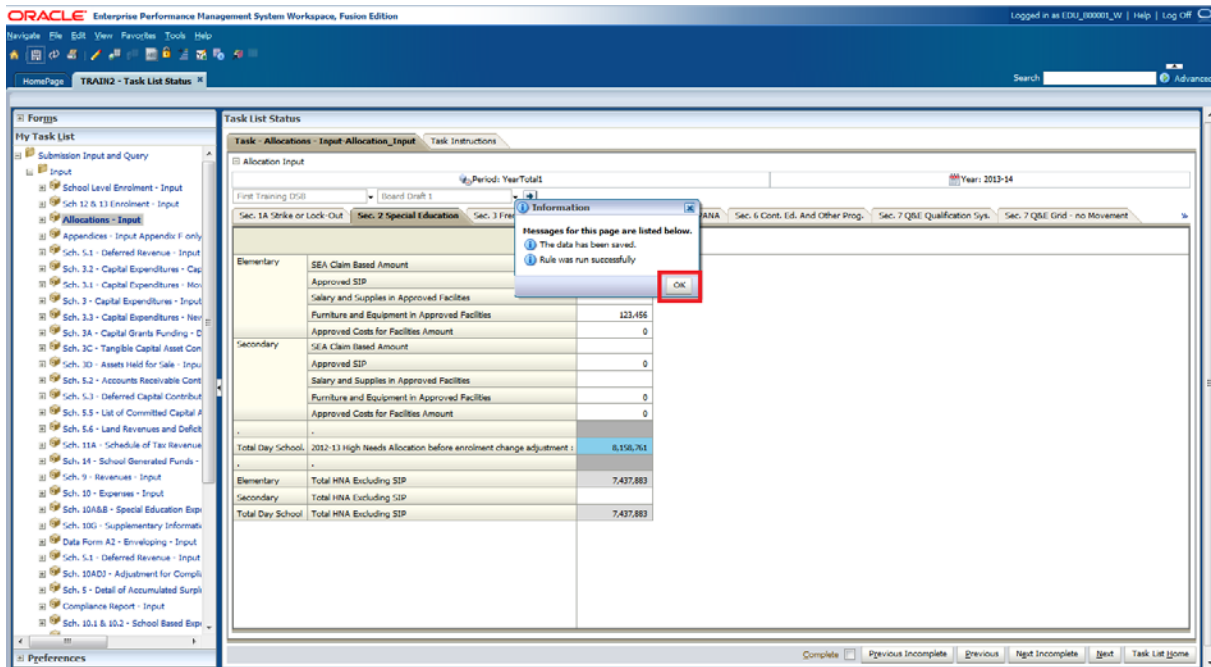


5.1.4 Save input field

To save data keyed in an input field click on the Save icon or **File → Save**



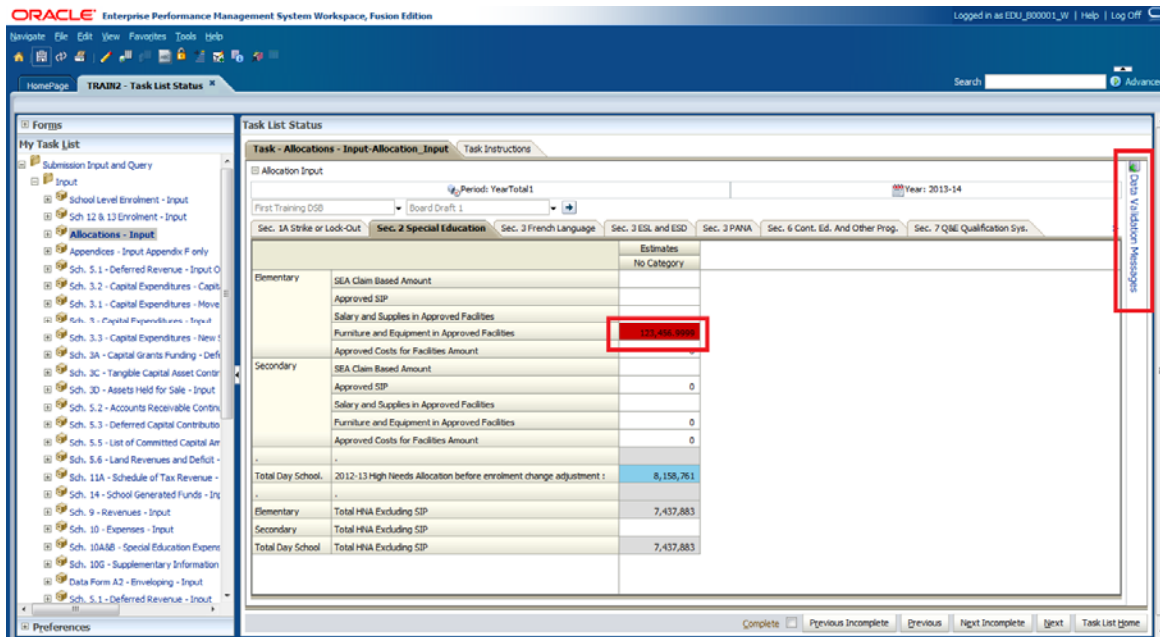
The system confirms that the data has been saved.



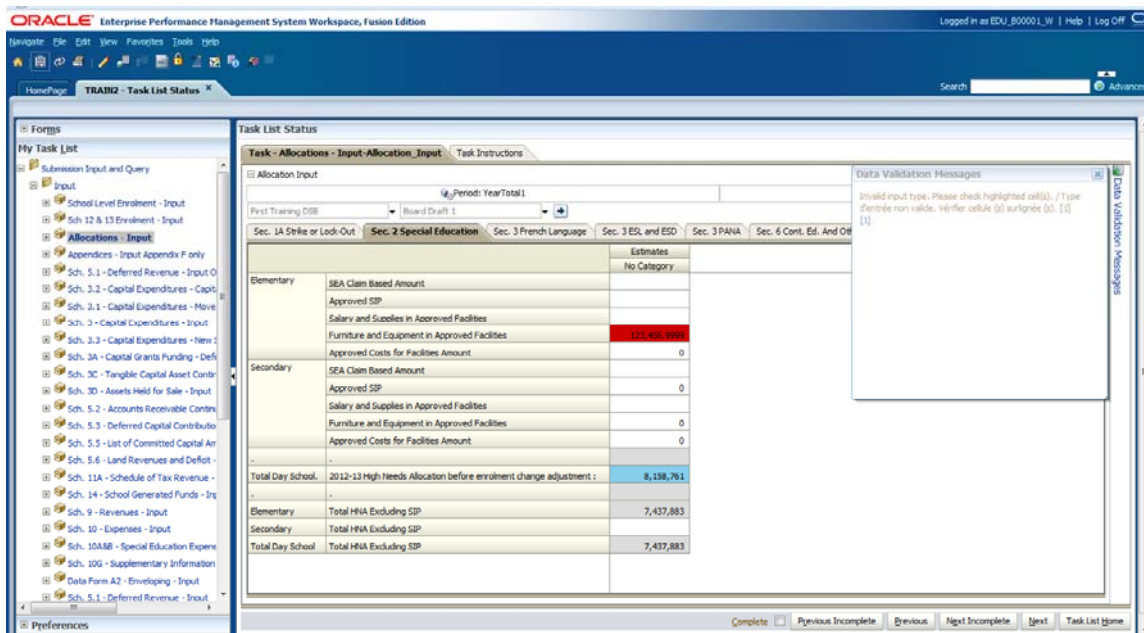
Click on **OK** to continue.

5.1.5 Invalid Data

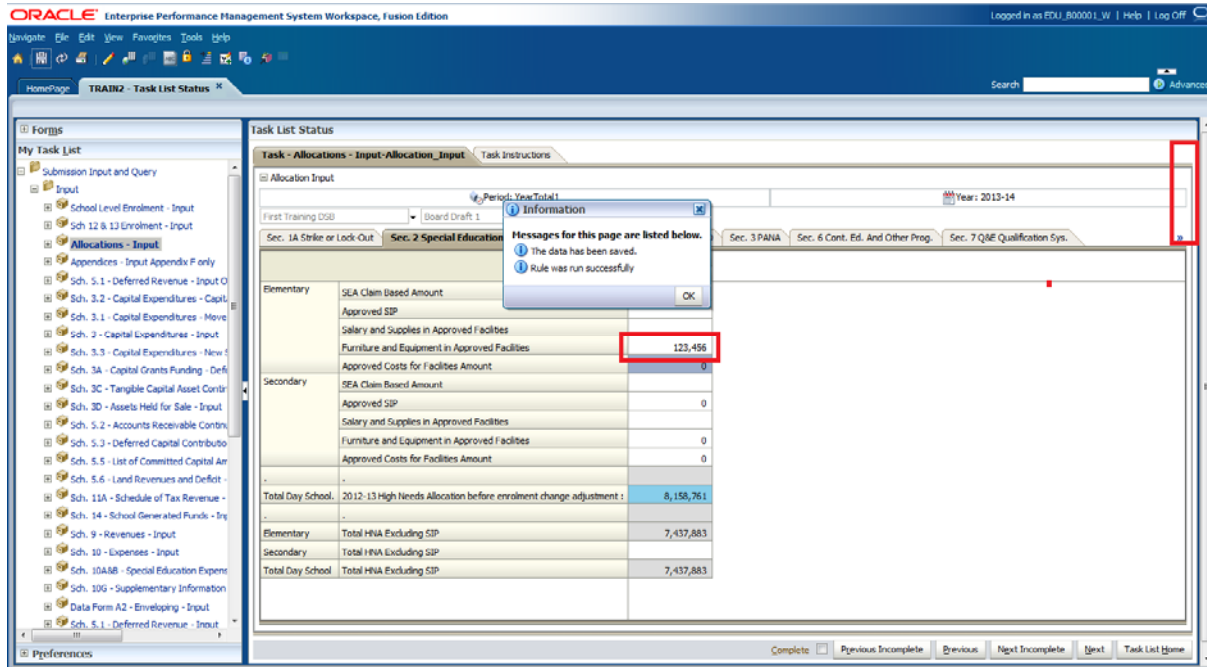
When the user enters and saves data that is invalid the invalid cell is highlighted in red and a Data Validation Message is displayed on the right side of the form.



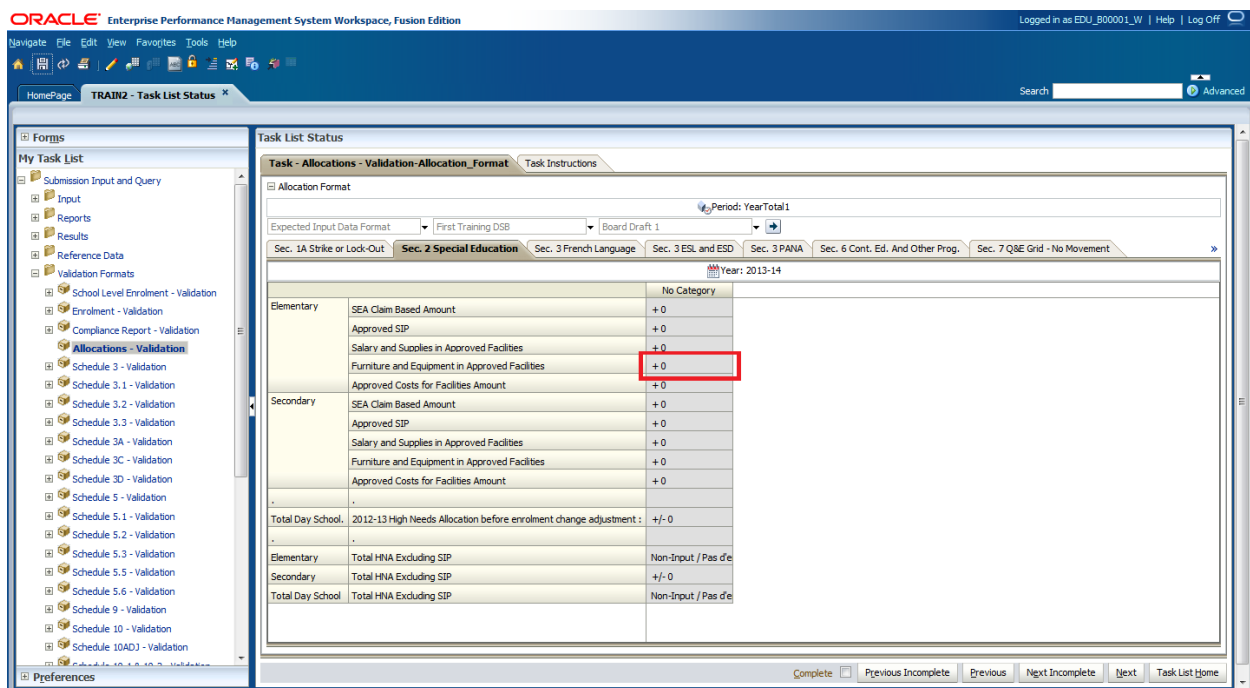
To see the Validation Error the user can click on Data Validation Message to displays the error message.



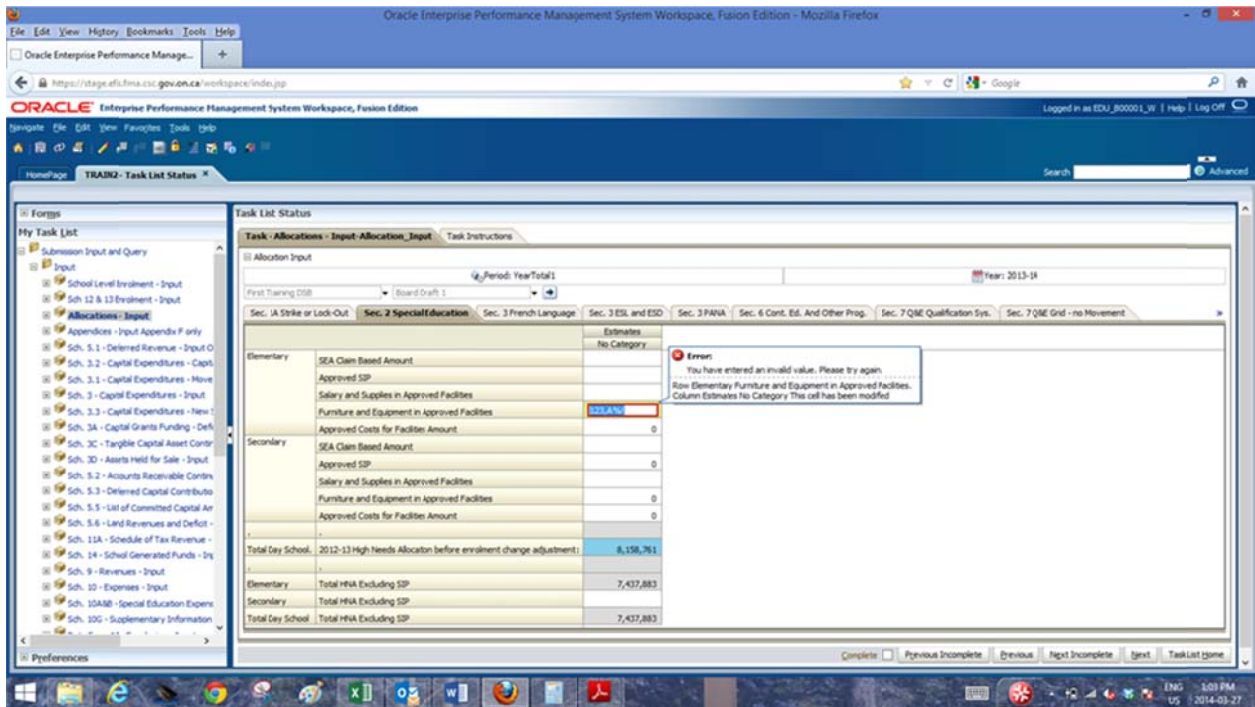
In order to correct the error, the user enters the correct value and saves the data. The confirmation message that the data is saved successfully is shown and if the data is now correct the validation message on the right side of the form disappears.



If the user is not sure what the cell format should be different, the user can check the cell format by opening the same form in the **Validation Formats** folder and see the description for each cell.



If the user enters a non numeric value into a cell that is expecting numeric values an error will be displayed and the user will not be able to navigate away from that cell until it is corrected.



5.1.6 Prior Year Adjustment

Data cell that have been loaded from a prior year or cycle but and can be adjusted by the user are blue. To make an adjustment click on the cell, enter data and save. If invalid data is entered the cell will become Red.

Task List Status - Allocations - Input-Allocation_Input

Period: YearTotal1 | Year: 2013-14

Elementary	SEA Claim Based Amount	Estimates
Approved SIP		No Category
Salary and Supplies in Approved Facilities		
Furniture and Equipment in Approved Facilities	123,456	
Approved Costs for Facilities Amount	0	
Secondary	SEA Claim Based Amount	
Approved SIP	0	
Salary and Supplies in Approved Facilities		
Furniture and Equipment in Approved Facilities	0	
Approved Costs for Facilities Amount	0	
Total Day School	2012-13 High Needs Allocation before enrolment change adjustment :	3,158,761
Elementary	Total HNA Excluding SIP	7,437,883
Secondary	Total HNA Excluding SIP	
Total Day School	Total HNA Excluding SIP	7,437,883

Information

Messages for this page are listed below.

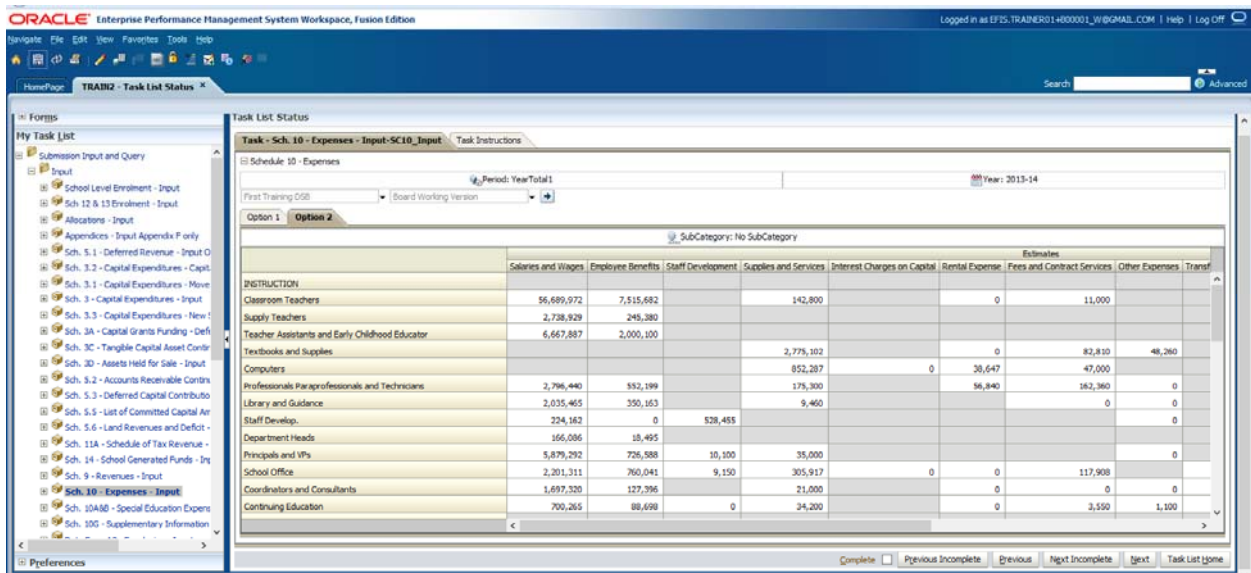
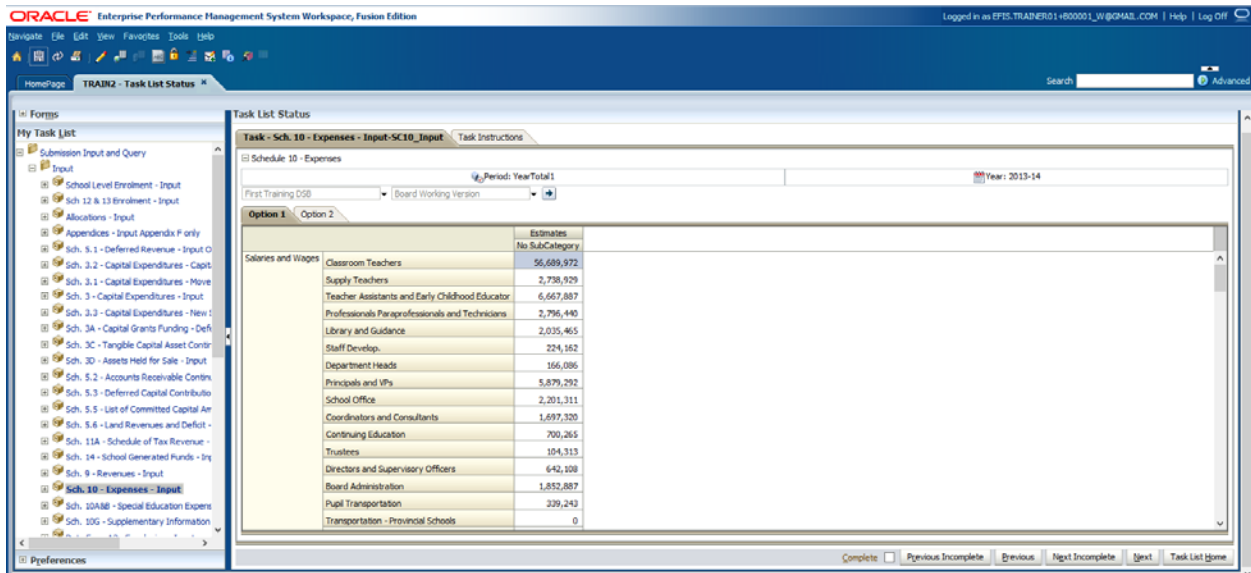
- The data has been saved.
- Rule was run successfully.

OK

Elementary	SEA Claim Based Amount	Estimates
Approved SIP		No Category
Salary and Supplies in Approved Facilities		
Furniture and Equipment in Approved Facilities	123,456	
Approved Costs for Facilities Amount	0	
Secondary	SEA Claim Based Amount	
Approved SIP	0	
Salary and Supplies in Approved Facilities		
Furniture and Equipment in Approved Facilities	0	
Approved Costs for Facilities Amount	0	
Total Day School	2012-13 High Needs Allocation before enrolment change adjustment :	8,158,999
Elementary	Total HNA Excluding SIP	7,437,996
Secondary	Total HNA Excluding SIP	
Total Day School	Total HNA Excluding SIP	7,437,996

5.1.7 Input Form Types

For some forms, for example Schedule 10- Expenses, 2 types of input form type forms are available for the user, Option 1 provides a single column of data entry; Option 2 displays the regular checkerboard approach. Users can enter data into either of the forms and the resulting data entry will be saved to both



5.1.8 Distribution of Elementary and Secondary Data

In EFIS 2.0 where data is required for both Elementary and Secondary, for example Schedule 10.1 and 10.2, data is now first entered at the total level (i.e Schedule 10) and the total amount is distributed to Elementary. To complete the distribution between Elementary and Secondary the user now enters the secondary amount only and the elementary amount will be calculated.

The screenshot shows the Oracle Enterprise Performance Management System Workspace. The main window is titled 'Task List Status' and displays a table for 'Task - Sch. 10.1 & 10.2 - School Based Expenses - Input-SC10.1_10.2_1'. The table is organized into two main sections: 'Elementary' and 'Secondary', both highlighted with red boxes. The 'Elementary' section includes rows for Classroom Teachers, Supply Teachers, Teacher Assistants and Early Childhood Educators, Textbooks and Supplies, Computers, Professionals Paraprofessionals and Technicians, Library and Guidance, Staff Develop., Department Heads, Principals and VPs, School Office, and Total Instruction Expenses. The 'Secondary' section includes rows for Classroom Teachers, Supply Teachers, Teacher Assistants and Early Childhood Educators, Textbooks and Supplies, Computers, Professionals Paraprofessionals and Technicians, Library and Guidance, Staff Develop., Department Heads, Principals and VPs, School Office, and Total Instruction Expenses. The table columns include Salaries and Wages, Employee Benefits, Staff Development, Supplies and Services, Interest Charges on Capital, Rental Expense, Fees and Contract Services, Other Expenses, and Transfer to Other. The 'Year' is set to 2013-14.

In the example below the user enters the amount of Secondary Total HNA Excluding SIP, then saves. The amount of Secondary Total HNA Excluding SIP is saved and the Elementary Total HNA Excluding SIP is recalculated to properly distribute the total amount between panels.

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The 'Task List Status' window is open, displaying a table of financial data. The table has columns for 'Elementary' and 'Secondary' categories, and a column for 'Estimates'. The 'Total HNA Excluding SIP' row for the 'Secondary' category is highlighted in yellow and enclosed in a red box, with a value of 883. The 'Total HNA Excluding SIP' row for the 'Elementary' category is also highlighted in yellow and enclosed in a red box, with a value of 7,437,883. The 'Total Day School' row for '2012-13 High Needs Allocation before enrolment change adjustment' has a value of 8,158,761.

Category	Item	Estimates
Elementary	SEA Claim Based Amount	No Category
	Approved SIP	
	Salary and Supplies in Approved Facilities	
	Furniture and Equipment in Approved Facilities	123,456
	Approved Costs for Facilities Amount	0
Secondary	SEA Claim Based Amount	
	Approved SIP	0
	Salary and Supplies in Approved Facilities	
	Furniture and Equipment in Approved Facilities	0
	Approved Costs for Facilities Amount	0
Total Day School: 2012-13 High Needs Allocation before enrolment change adjustment:		8,158,761
Elementary	Total HNA Excluding SIP	7,437,883
Secondary	Total HNA Excluding SIP	883
Total Day School	Total HNA Excluding SIP	7,437,883

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The 'Task List Status' window is open, displaying a table of financial data. The 'Total HNA Excluding SIP' row for the 'Elementary' category is highlighted in yellow and enclosed in a red box, with a value of 7,437,000. The 'Total HNA Excluding SIP' row for the 'Secondary' category is also highlighted in yellow and enclosed in a red box, with a value of 883. The 'Total Day School' row for '2012-13 High Needs Allocation before enrolment change adjustment' has a value of 8,158,761. An information dialog box is visible in the foreground, stating: "Messages for this page are listed below. The data has been saved. Rule was run successfully." The dialog box has an 'OK' button.

Category	Item	Estimates
Elementary	SEA Claim Based Amount	No Category
	Approved SIP	
	Salary and Supplies in Approved Facilities	
	Furniture and Equipment in Approved Facilities	123,456
	Approved Costs for Facilities Amount	0
Secondary	SEA Claim Based Amount	
	Approved SIP	0
	Salary and Supplies in Approved Facilities	
	Furniture and Equipment in Approved Facilities	0
	Approved Costs for Facilities Amount	0
Total Day School: 2012-13 High Needs Allocation before enrolment change adjustment:		8,158,761
Elementary	Total HNA Excluding SIP	7,437,000
Secondary	Total HNA Excluding SIP	883
Total Day School	Total HNA Excluding SIP	7,437,883

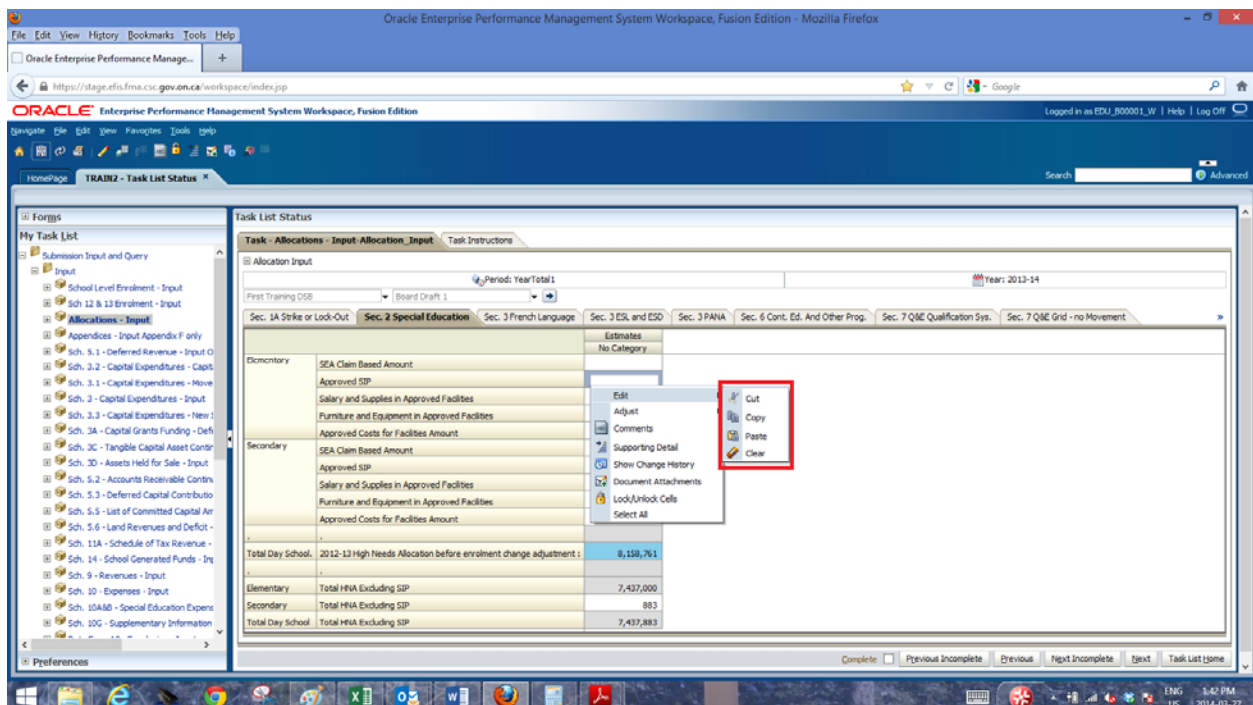
5.2 Cell Right Click Functionality

Hyperion Planning provides additional functionality to support data input. This functionality can be accessed by right clicking on an input cell. Functionality that is available in EFIS 2.0 includes:

- Edit
 - Cut
 - Copy
 - Paste
 - Clear
- Comments
- Supporting Details
- Show Change History

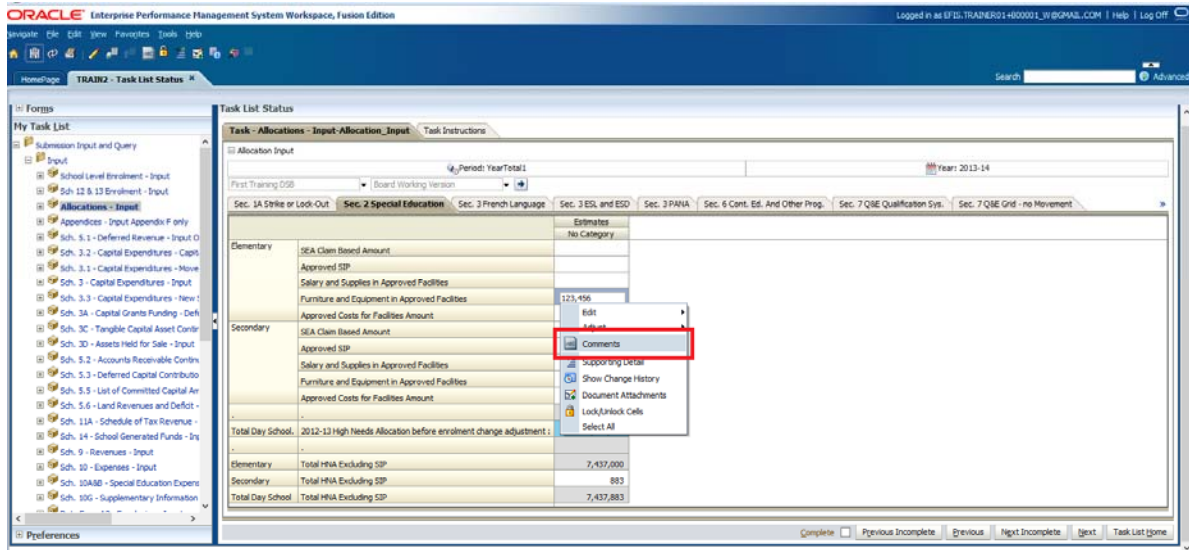
5.2.1 Edit

Standard Cut, Copy, Paste, Clear functionality can be accessed by right clicking on a cell the select **Edit** → **Cut** will delete the value and save it to your clipboard, copy will copy the value to your clipboard, paste will copy in the value from the clipboard and Clear will delete the value in the cell.

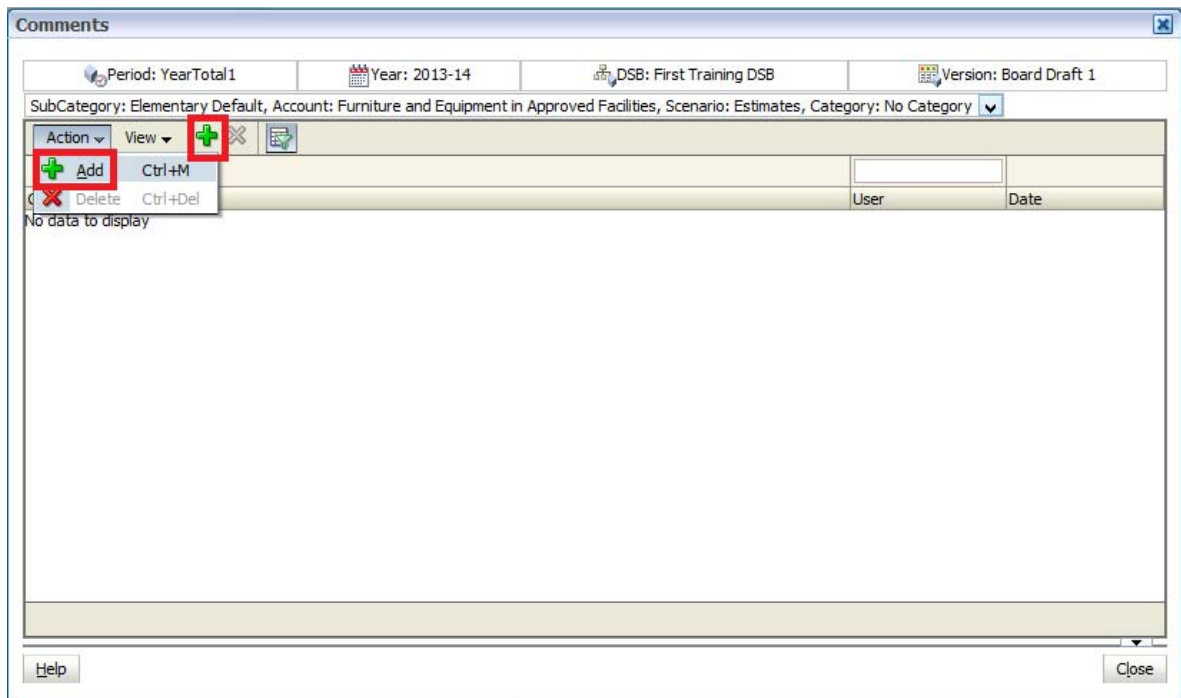


5.2.2 Comments

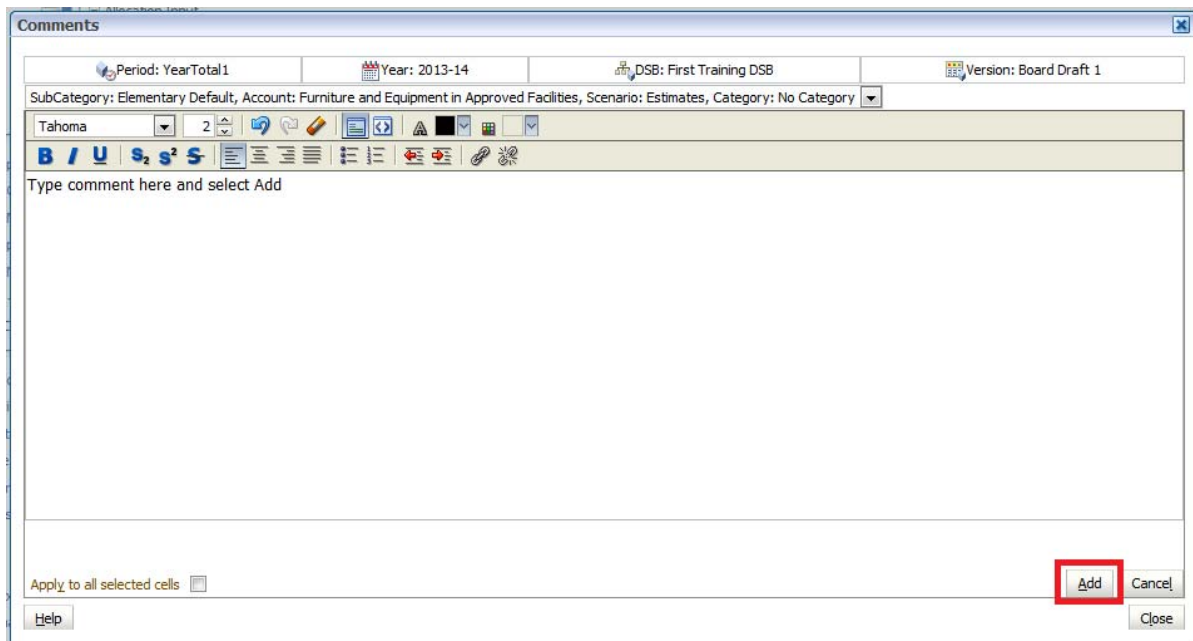
Users can attach a comment to a cell by right clicking on the cell and selecting **Comment**.



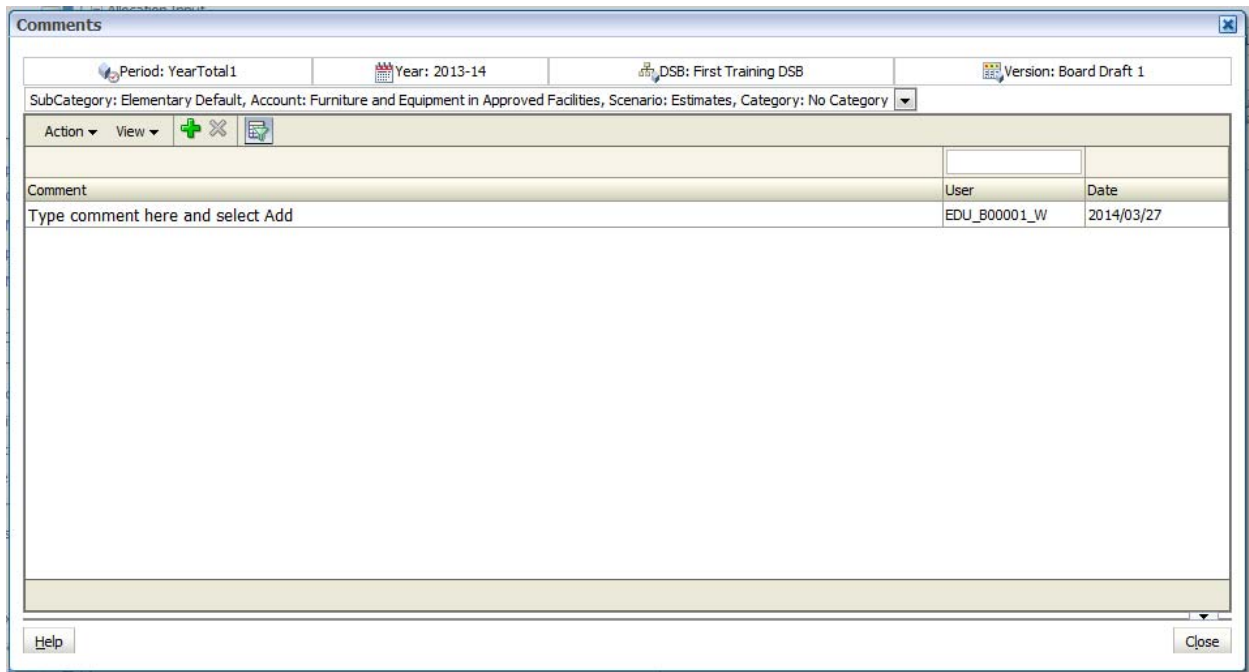
In the comment box that is displayed select either the green + or **Action** → **Add** to enter a comment



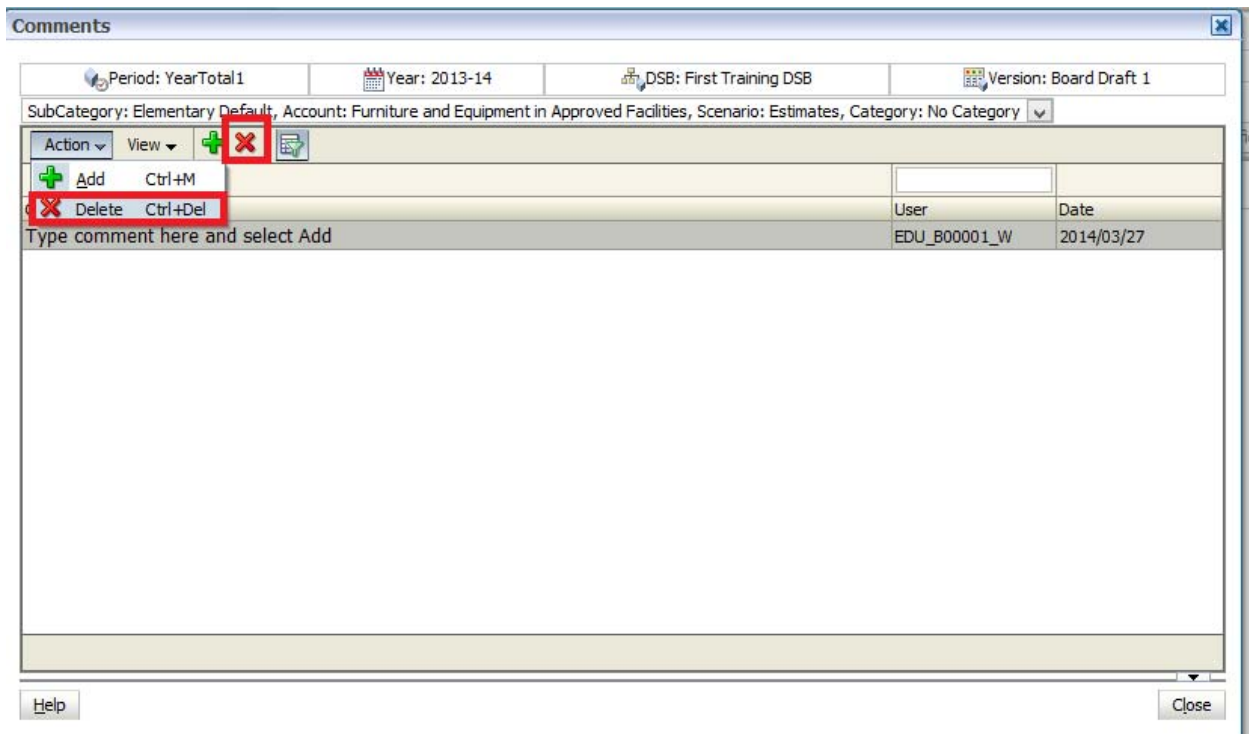
When the Comments window opens enter the comment and select Add.



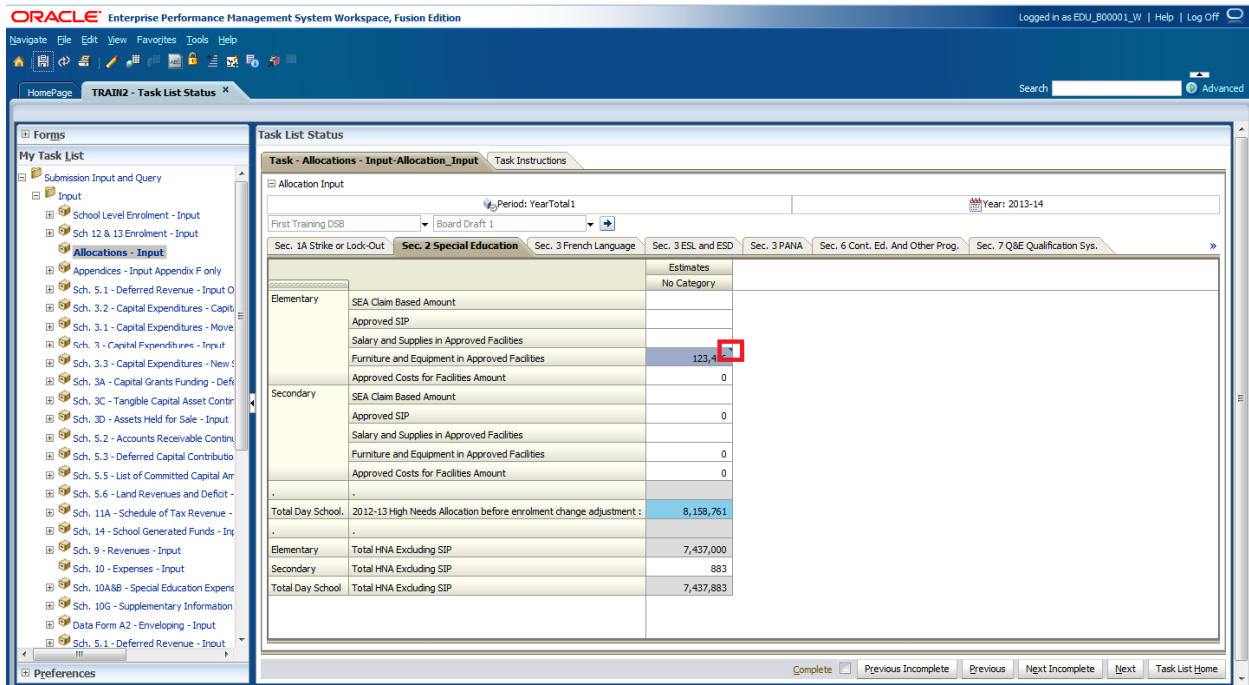
Comments are saved with the user name and date. Comments cannot be edited once they have been saved.



To remove a comment select the comment then either the Red **X** or **Action** → **Delete**

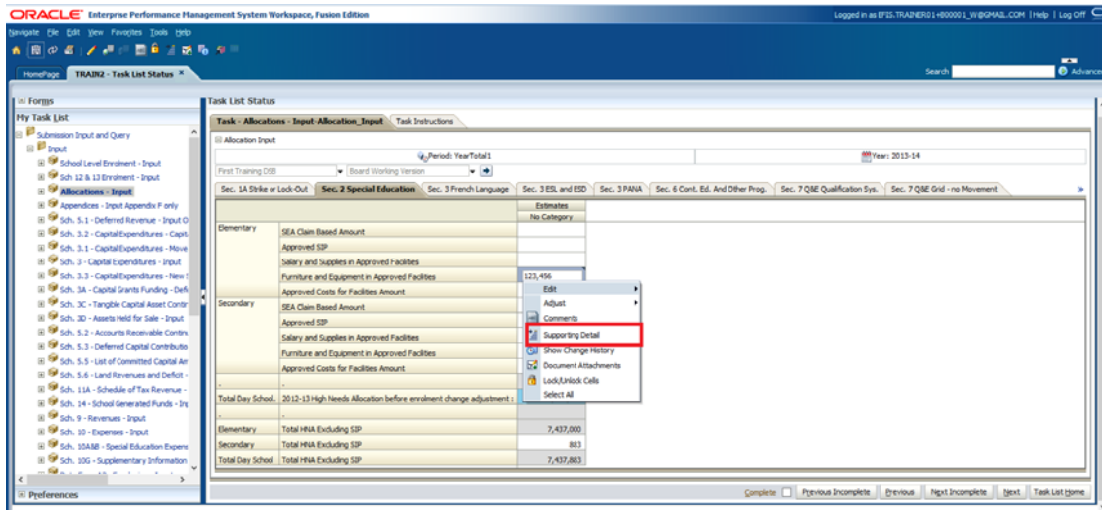


Cells that have comments will have a triangle in the top left corner of the cell.

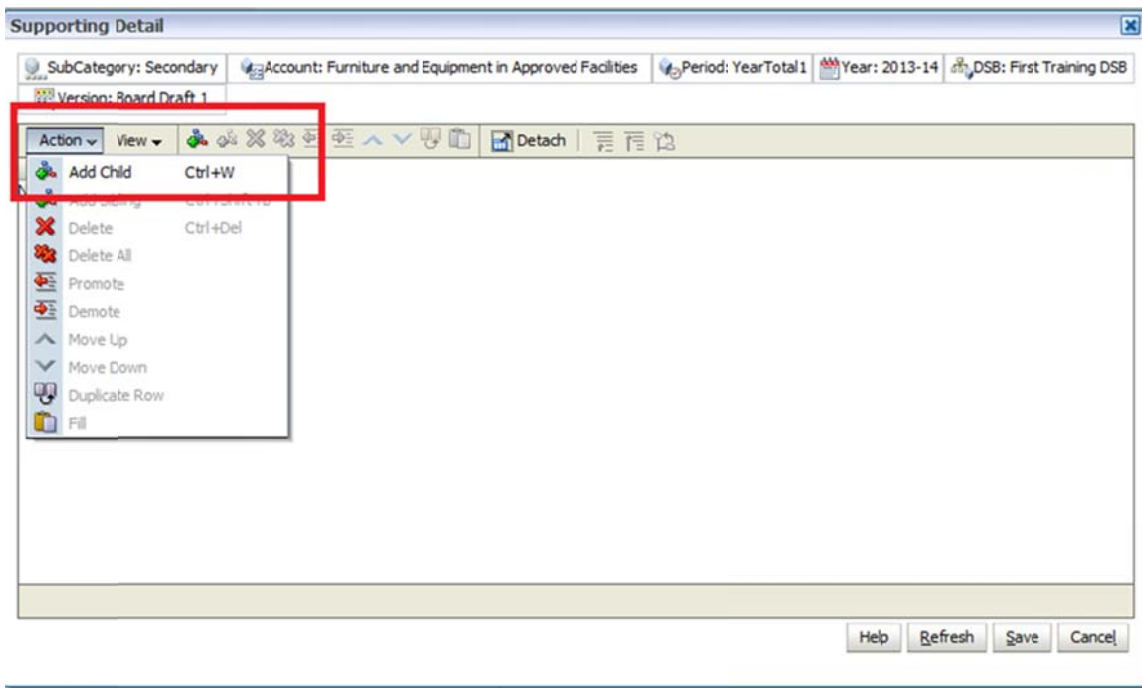


5.2.3 Supporting Details

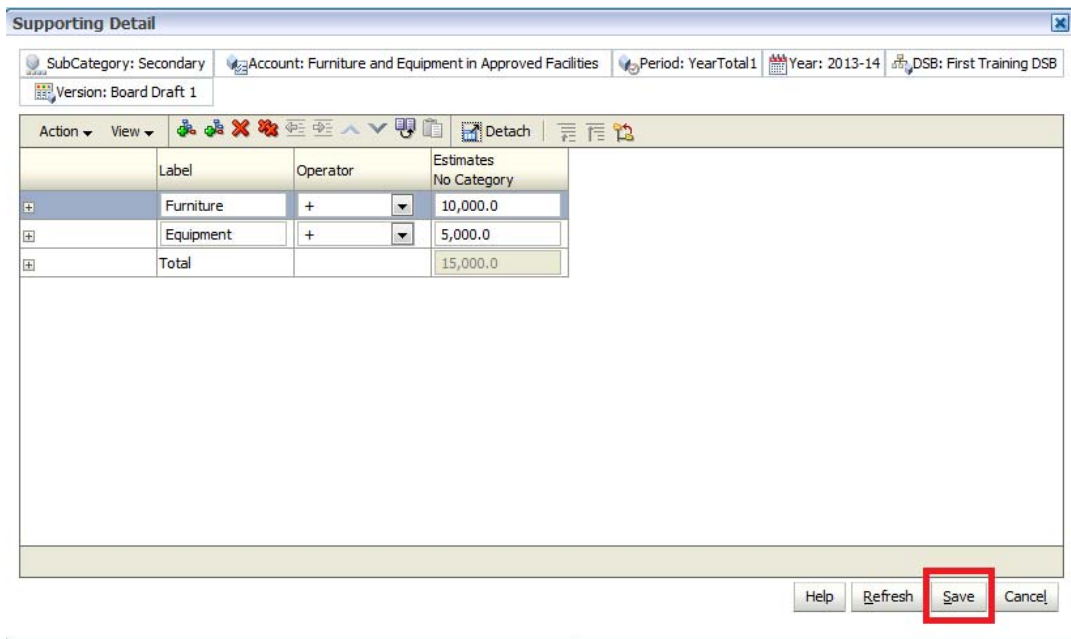
The user can add supporting details to an input cell by right clicking on the cell and selecting **Supporting Detail**.



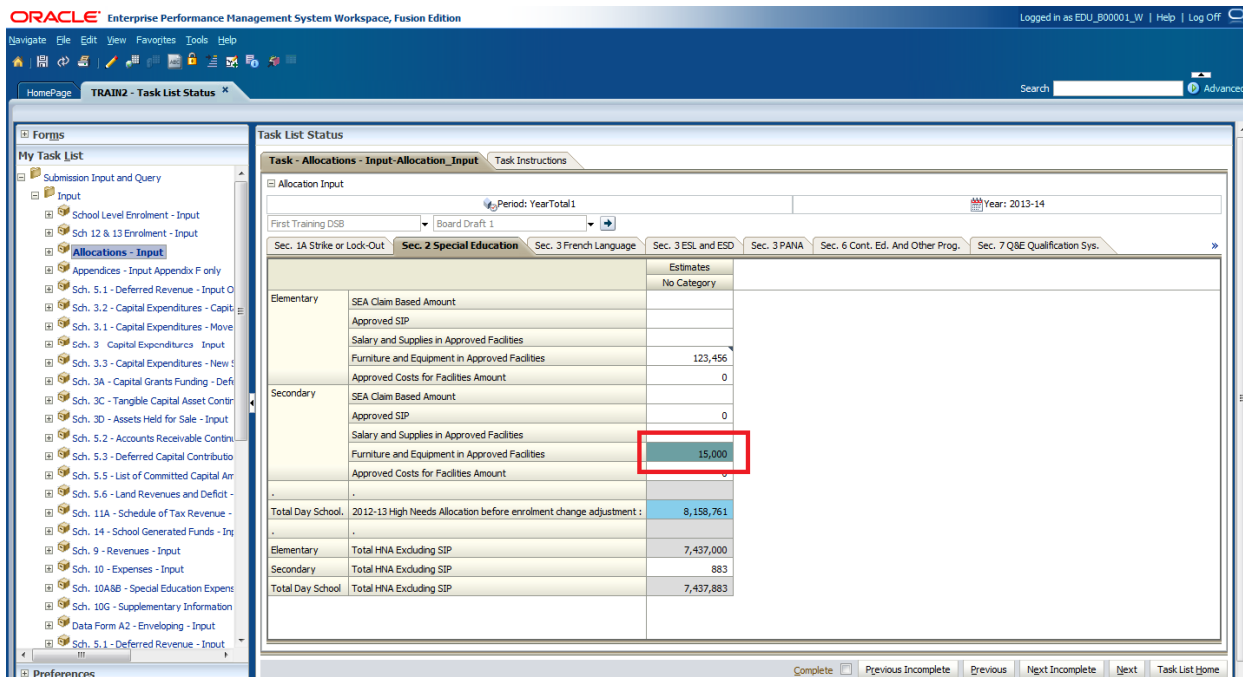
To enter data select **Action** → **Add Child or Add Sibling** depending on how the user wants to display the information.



The example below shows how the user can provide the detailed split between Equipment and Furniture. Enter the detailed amounts and labels and select **Save**.

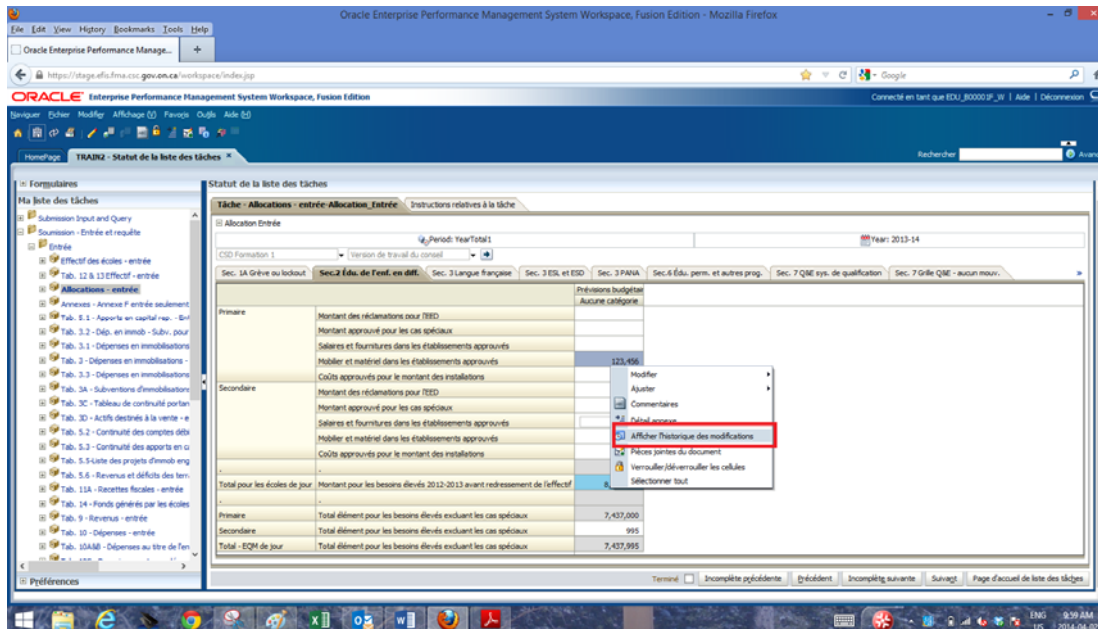


The total of the supporting details will be calculated and stored in the cell. The colour of the cell will change to dark blue to indicate that there is supporting detail



5.2.4 Show Change History

Each time the value in a cell is changed a record on the changes is kept in the database. To access the list of changes right clicking on the cell and selecting **Show Change History**,

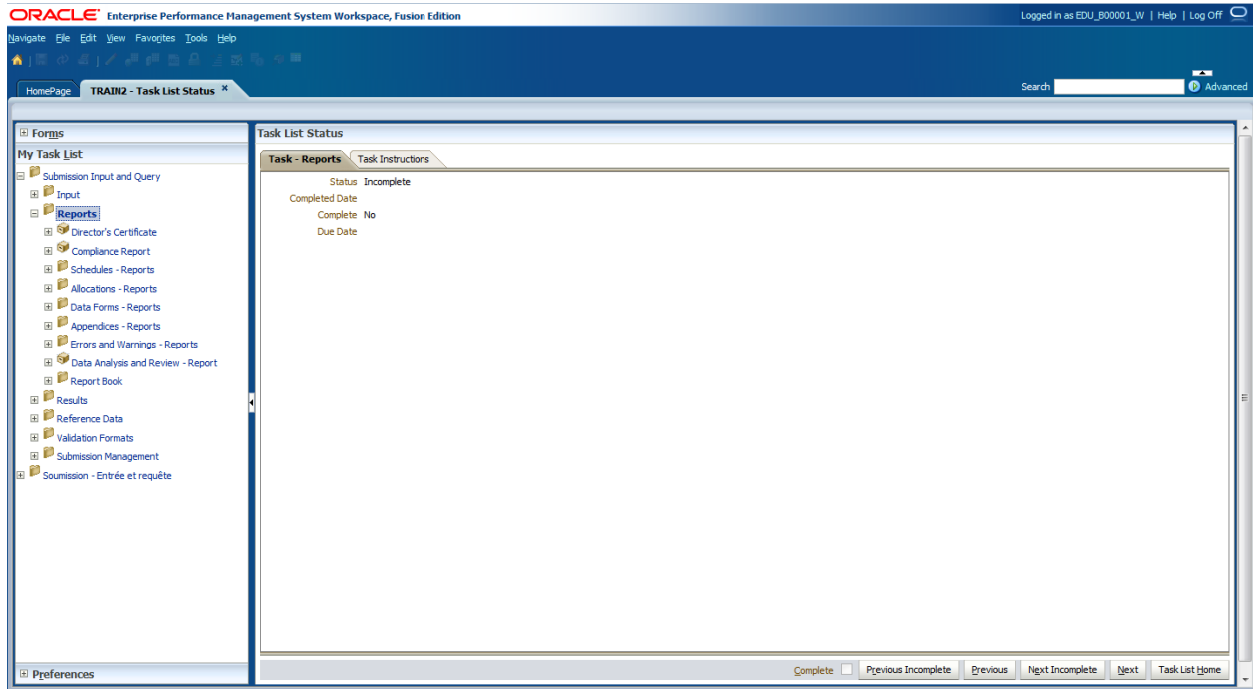


The Change History screen will be displayed and identifies that user, the date, and the values that were changed.

Historique des modifications			
Utilisateur	Date	Ancienne valeur	Nouvelle valeur
EDU_B00001F_W	2014/04/01 4:12 PM	0.0	123456.0
EDU_B00001F_W	2014/04/01 4:12 PM	123456.0	123.0
EDU_B00001F_W	2014/04/01 4:14 PM	123.0	123456.0
EDU_B00001F_W	2014/04/01 4:16 PM	123456.0	123456.9999
EDU_B00001F_W	2014/04/01 4:18 PM	123456.9999	123456.0

5.3 Reports

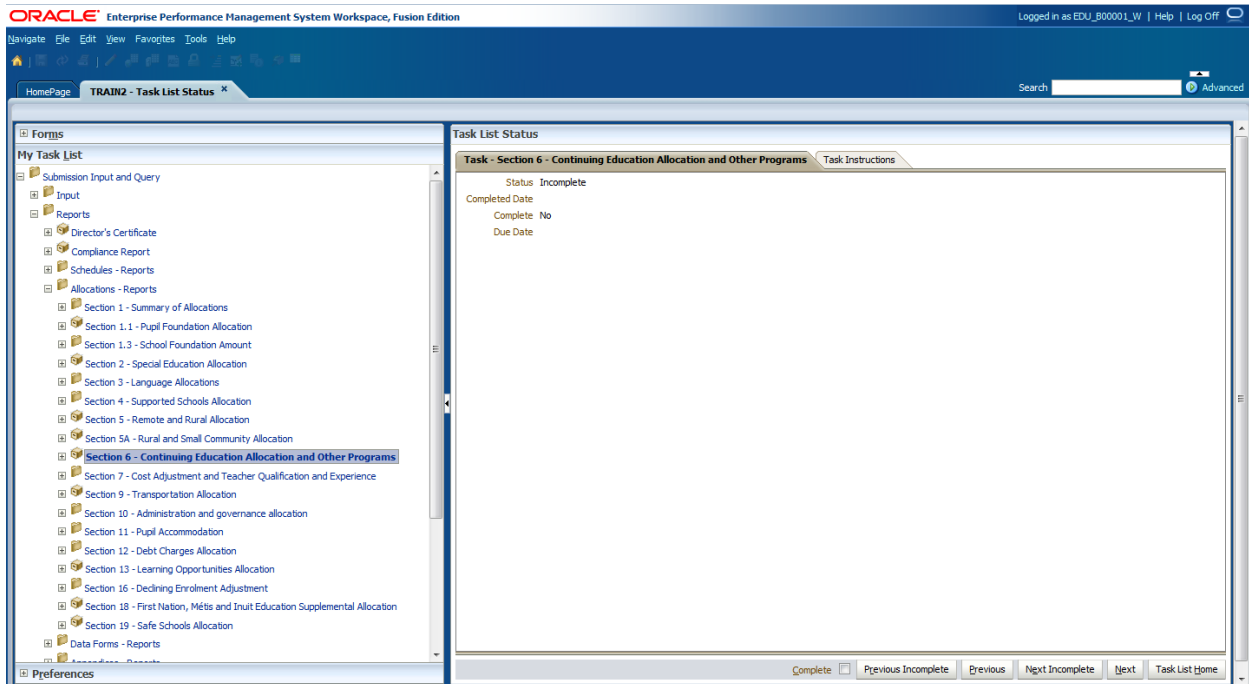
Reports provide the user with the results of each of the sections in a report format. Users can access individual reports or a Report book that contains all reports.



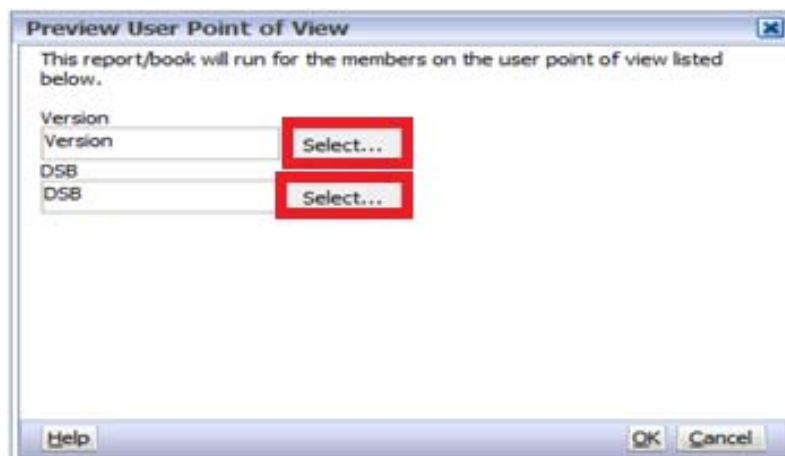
In order to simplify the reports process, users need to perform a simple one-time **Preference** set-up at the start of each new cycle. Please refer to **Section 5.1** for detailed instructions.

5.3.1 Running a Report

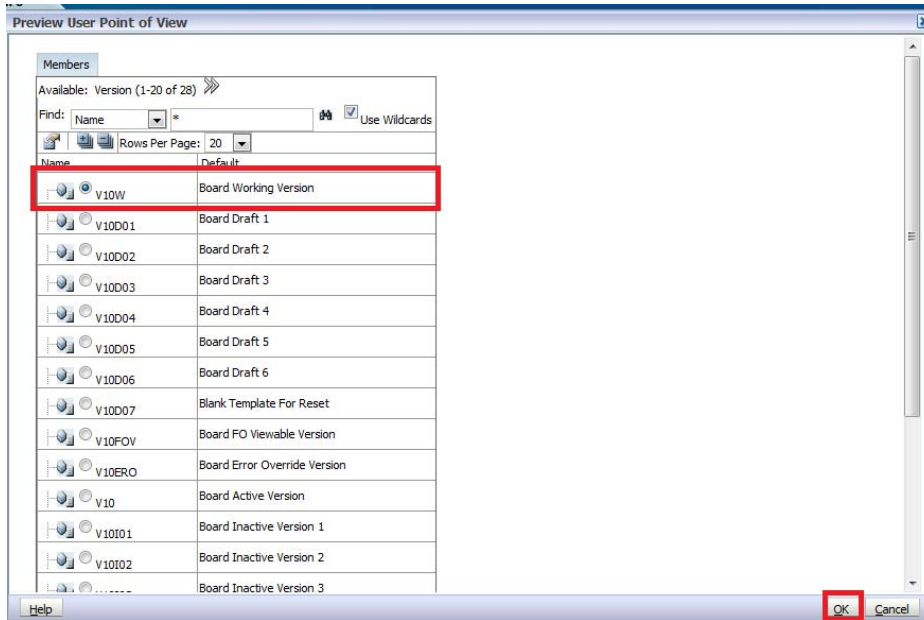
To run a report the user selects the report from the Task List..



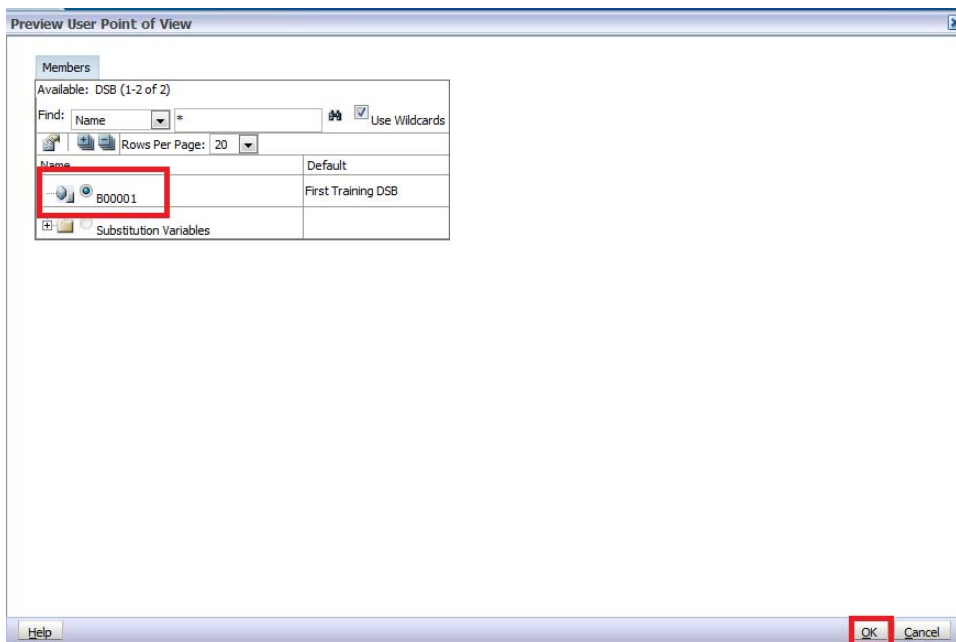
The Preview User Point of View screen will be displayed. The first time reports are run each cycle the user must select a version and the DSB, This will become the default setting until the user changes the Version. If an **error message** is displayed prior to the POV screen check that the settings in **Section 5.1** have been applied



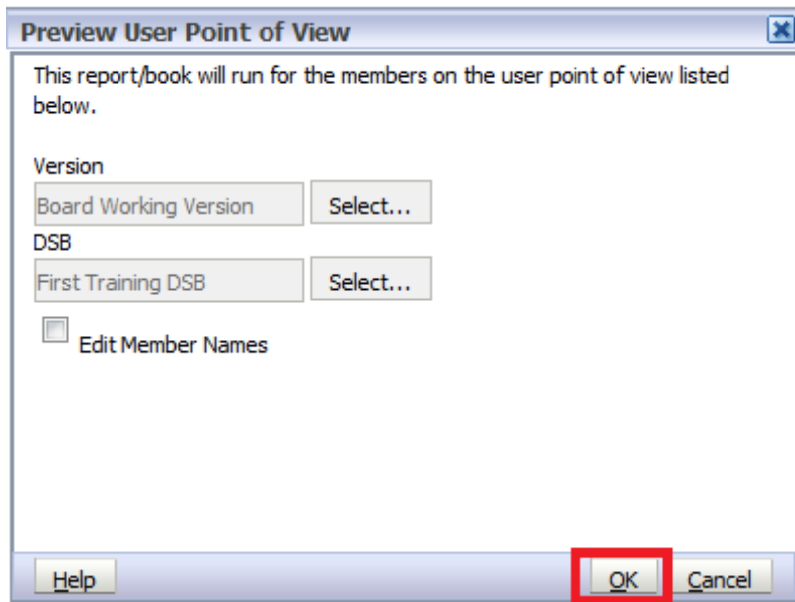
To select the Version click the **Select** button beside Version to open the version selection screen, select the version then **OK**



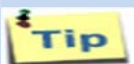
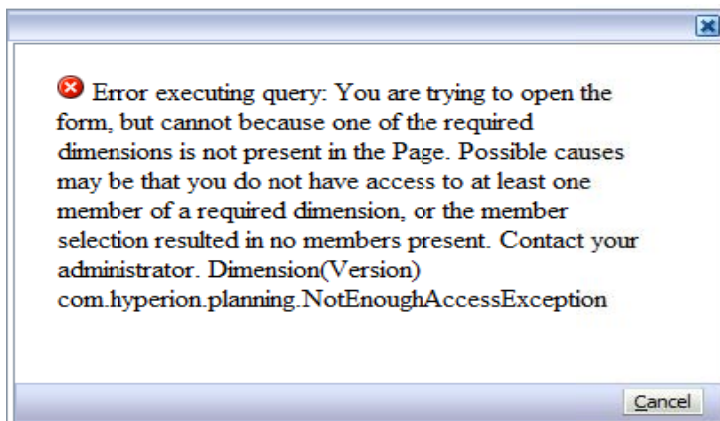
To select the DSB click the **Select** button beside DSB to open the DSB selection screen, select the DSB then **OK**



The POV screen is will now have a version and the DSB selected select **OK** to run the report



The report will generate in PDF. The user can view, save or print. Reports will contain detail similar to the reports that were available in EFIS 1.0



If an error above occurs, check that the Version and DSB have been selected



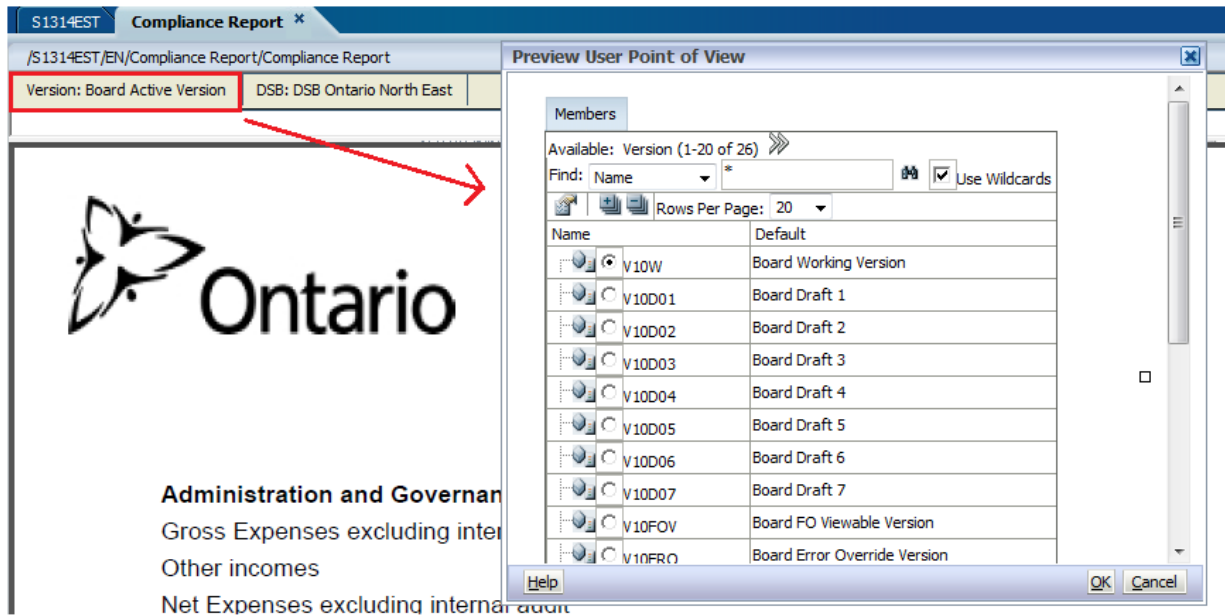
Submission Version: Board Working Version
 School Board Name: First Training DSB
 School Year: 2013-14
 Cycle: Estimates

Section 6 - Continuing Education Allocation and Other Programs

Adult Education, Continuing Education and Summer School		Benchmark	ADE	Allocation
6.1	Total Adult Day School Allocation	3,306.00	36.50	120,669
6.2	Total High Credit Allocation	3,306.00	0.00	0
6.3	Total Continuing Education Allocation	3,306.00	139.40	460,856
6.4	Total Summer School Allocation	3,306.00	21.58	71,343
6.5	Adult Education, High Credit, Continuing Education and Summer School Allocation			652,869
((Item 6.1 Benchmark x ADE) + (Item 6.2 Benchmark x ADE) + (Item 6.3 Benchmark x ADE) + (Item 6.4 Benchmark x ADE))			
International Languages - Elementary				
6.6	International Language Course enrolment			90
6.7	International Language Number of classes			3
6.8	International Language Average class size			30.0
(Item 6.6/Item 6.7)			
6.9	International Language Number of hours			166.00
		Hourly Rate		
6.10	International Allocation before small class size adjustment	54.47		9,042
(Item 6.9 x Hourly Rate)			
		Max Class Size	Reduction per Hour	
6.11	Adjustment for Small Class Size	23	1	0
If Max Class Size is greater than item 6.8, then the adjustment is equal to (Max Class Size - Item 6.8) x Reduction per Hour x Item 6.9, otherwise the adjustment is zero.			
6.12	International languages allocation			9,042
(Item 6.10 - Item 6.11)			
		PLAR Equivalent Assessment Amount	PLAR Completed Challenges Grade 11-12	
6.13	PLAR Allocation	119	358	11,781
(Item 3.1 + Item 3.2 Schedule 12) X PLAR Equivalent Assess. Amt.) + (Item 3.3, Schedule 12 X PLAR Completed Challenges Grade 11-12)			
6.14	Continuing Education Allocation and Other Program			673,692
(Item 6.4 + Item 6.12 + Item 6.13)			

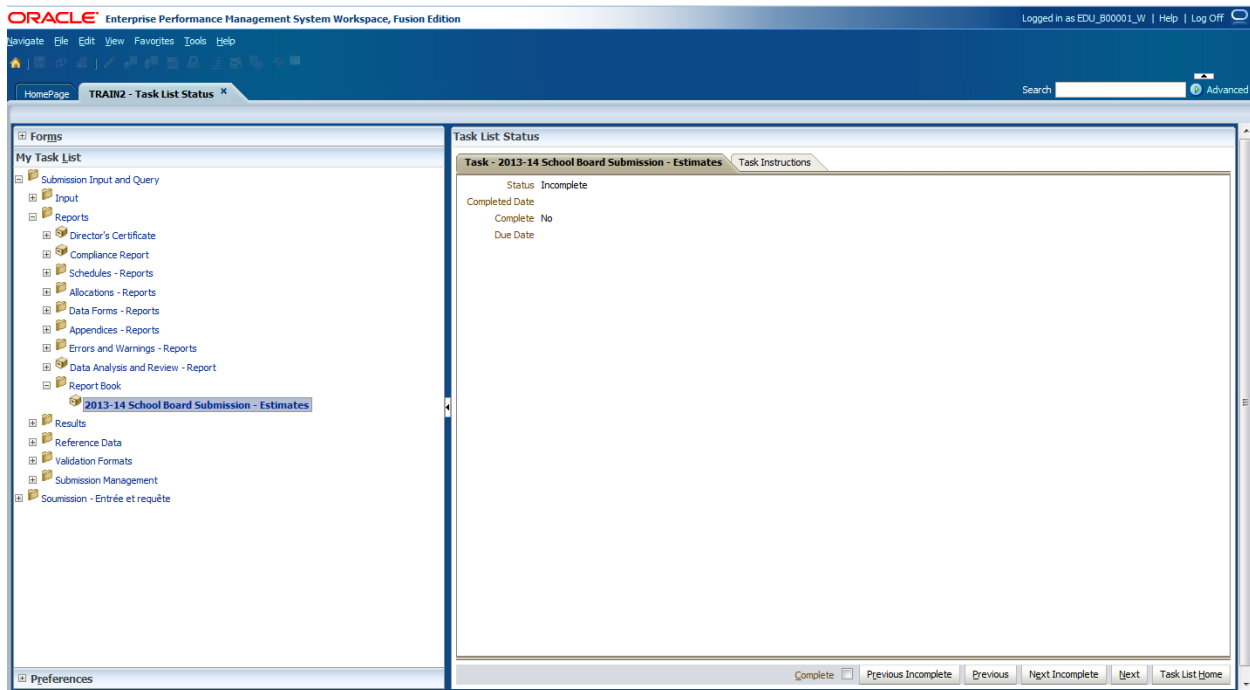


To change the Version selection without regenerating the report the user can select the Version screen by selecting the **Version** tab in the top left side of the report. Select the new version then select **OK** and the report will refresh with the new data.

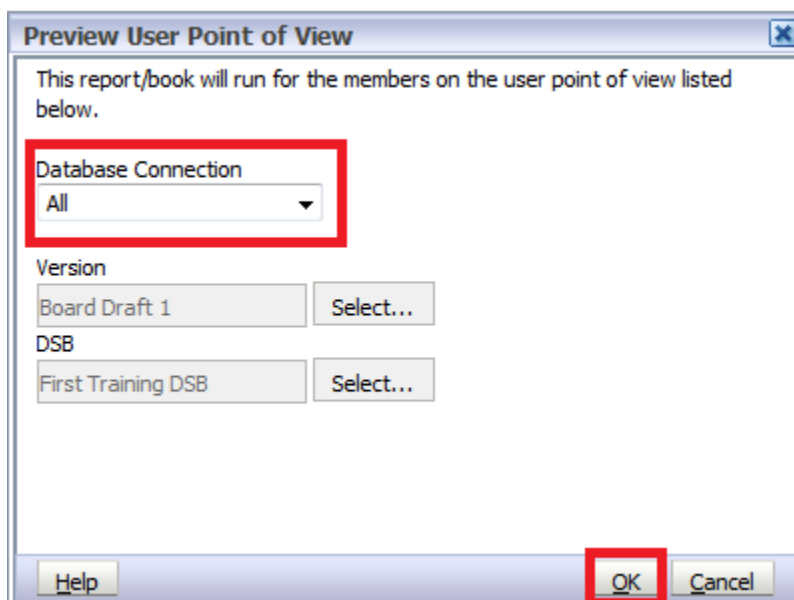


5.3.2 Generating Report Books

To generate a complete set of reports for all forms the user selects **Reports** → **Report Book** → **2013-14 School Board Submission – Estimates** (or the cycle you are running your report on)



The Preview User Point of View dialog will appear. Select the Version that is to be run. In the **Database Connection** ensure **All** is selected and then select **OK** to generate the Report Book.

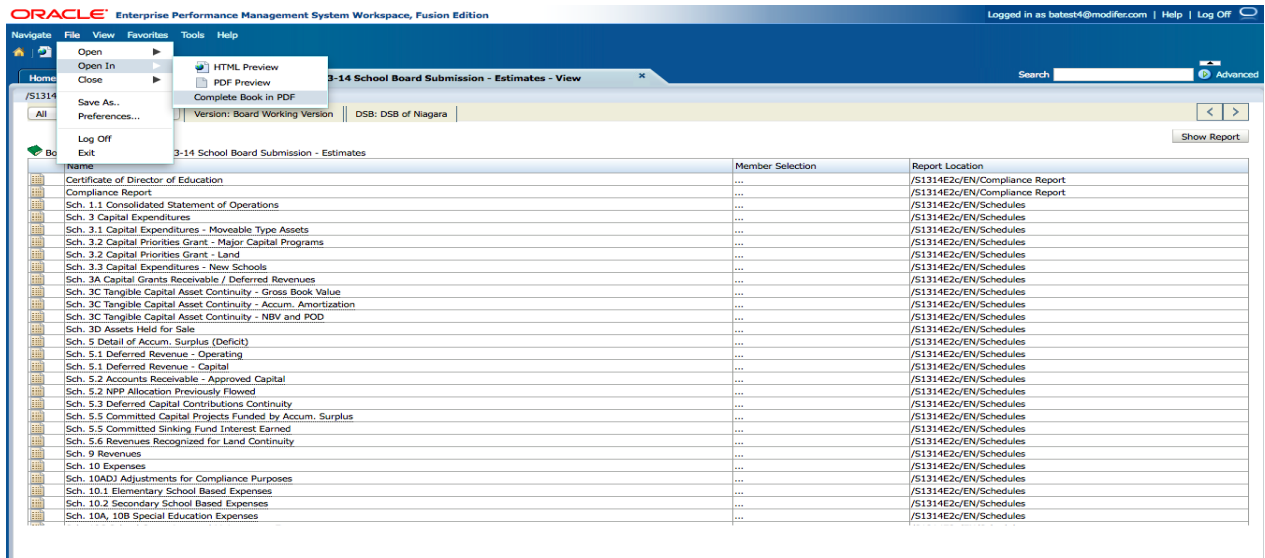




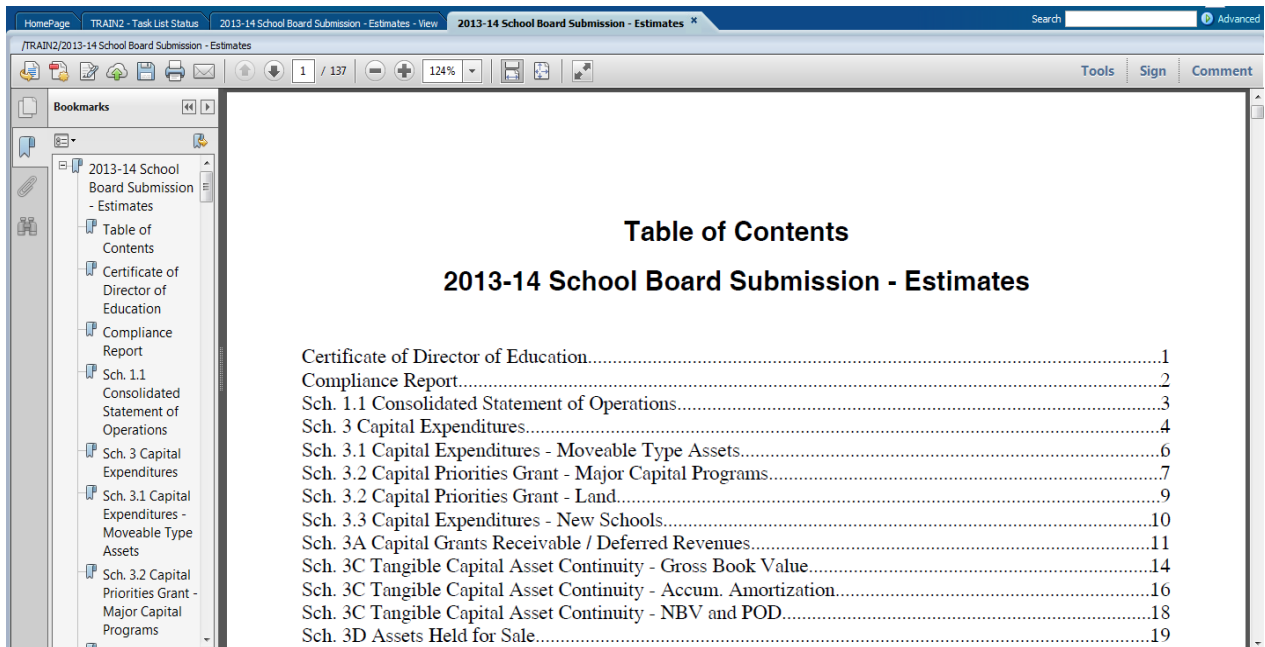
When creating the Report Book, your planning screen will go blank for some time until the report is created. During this time you can perform some other tasks in the Planning until your report is created.

The report will return the Table of Contents; the user can open a single report by selecting the **ICON** to the left of the report or open the complete report by selecting **File → Open In → Complete Book in PDF**

Name	Member Selection	Report Location
☰ Certificate of Director of Educat...	...	/TRAIN2/EN/Compliance Report
☰ Compliance Report	...	/TRAIN2/EN/Compliance Report
☰ Sch. 1.1 Consolidated Statement o...	...	/TRAIN2/EN/Schedules
☰ Sch. 3 Capital Expenditures	...	/TRAIN2/EN/Schedules
☰ Sch. 3.1 Capital Expenditures - M...	...	/TRAIN2/EN/Schedules
☰ Sch. 3.2 Capital Priorities Grant...	...	/TRAIN2/EN/Schedules
☰ Sch. 3.2 Capital Priorities Grant...	...	/TRAIN2/EN/Schedules
☰ Sch. 3.3 Capital Expenditures - M...	...	/TRAIN2/EN/Schedules
☰ Sch. 3A Capital Grants Receivable	...	/TRAIN2/EN/Schedules
☰ Sch. 3C.1 Tangible Capital Asset Co...	...	/TRAIN2/EN/Schedules
☰ Sch. 3C.2 Tangible Capital Asset Co...	...	/TRAIN2/EN/Schedules
☰ Sch. 3C.3 Tangible Capital Asset Co...	...	/TRAIN2/EN/Schedules
☰ Sch. 3D Assets Held for Sale	...	/TRAIN2/EN/Schedules
☰ Sch. 5 Detail of Accum. Surplus (...)	...	/TRAIN2/EN/Schedules
☰ Sch. 5.1 Deferred Revenue - Opera...	...	/TRAIN2/EN/Schedules
☰ Sch. 5.1 Deferred Revenue - Capit...	...	/TRAIN2/EN/Schedules
☰ Sch. 5.2 Accounts Receivable - Ap...	...	/TRAIN2/EN/Schedules
☰ Sch. 5.2 MPP Allocation Previous...	...	/TRAIN2/EN/Schedules
☰ Sch. 5.3 Deferred Capital Contrib...	...	/TRAIN2/EN/Schedules
☰ Sch. 5.5 Committed Capital Projec...	...	/TRAIN2/EN/Schedules
☰ Sch. 5.5 Committed Sinking Fund (...)	...	/TRAIN2/EN/Schedules
☰ Sch. 5.6 Revenues Recognized For	/TRAIN2/EN/Schedules
☰ Sch. 9 Revenues	...	/TRAIN2/EN/Schedules
☰ Sch. 10 Expenses	...	/TRAIN2/EN/Schedules
☰ Sch. 10A01 Adjustments for Compl...	...	/TRAIN2/EN/Schedules
☰ Sch. 10.1 Elementary School Based...	...	/TRAIN2/EN/Schedules
☰ Sch. 10.2 Secondary School Based	/TRAIN2/EN/Schedules
☰ Sch. 10A. 10B Special Education E...	...	/TRAIN2/EN/Schedules
☰ Sch. 10C School Operations and Ma...	...	/TRAIN2/EN/Schedules
☰ Sch. 10F Schedule of Employee Ben...	...	/TRAIN2/EN/Schedules

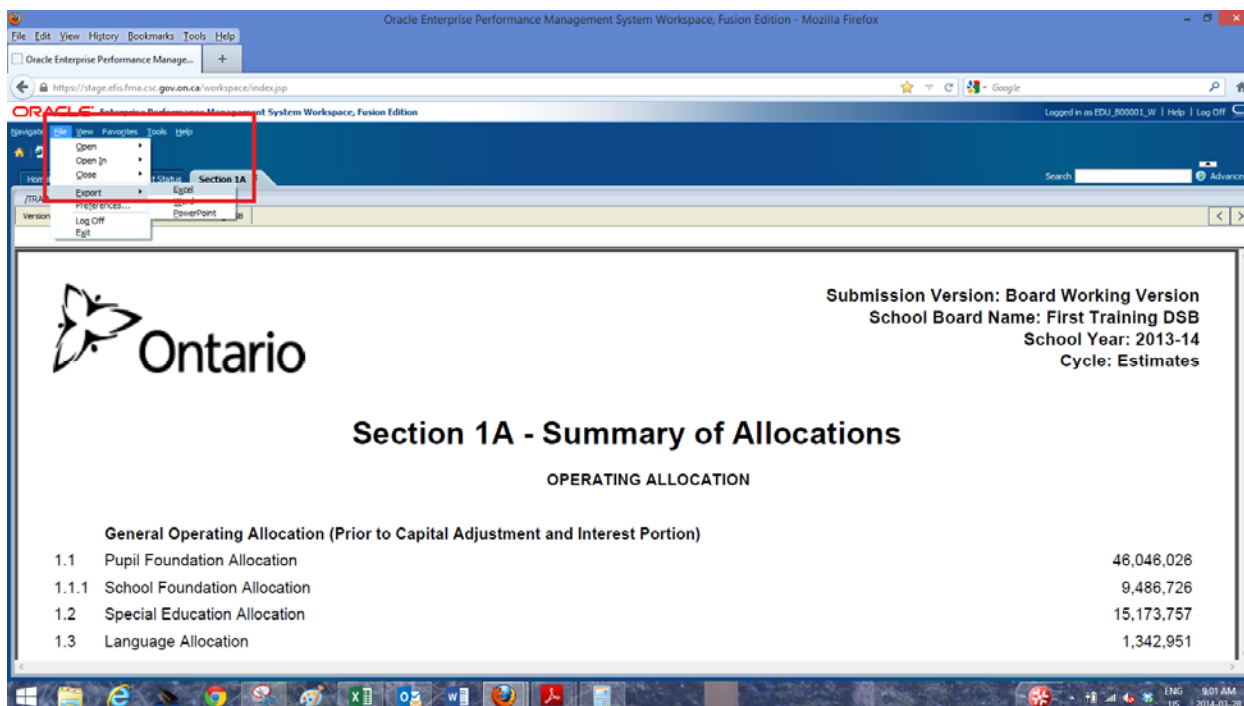


Report will be generated in PDF.

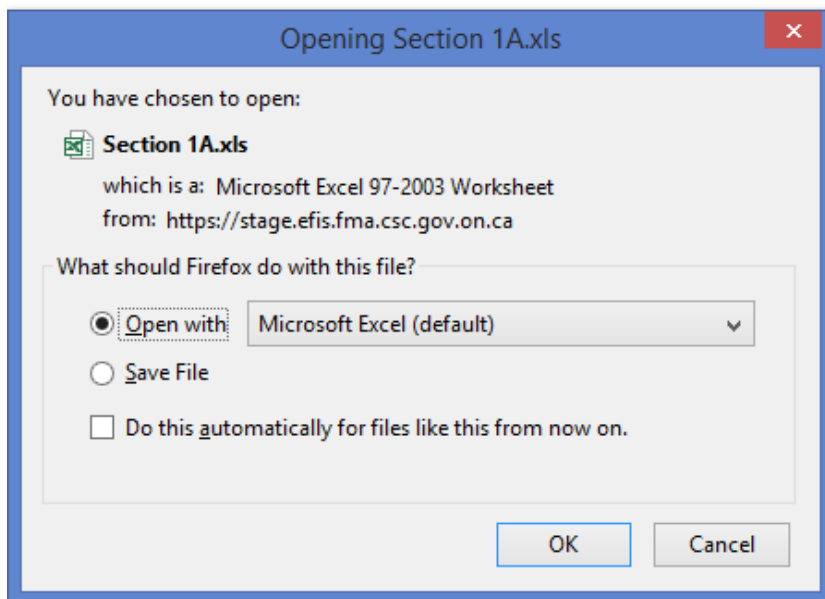


5.3.3 Opening a report in Excel

Reports that have been generated in PDF can also be exported and saved in Excel format. To export a report to Excel select **File → Export → Excel**



Select **Open with** or **Save**



Report will be exported to Excel

Section 1A [Read-Only] - Microsoft Excel

Submission Version: Board Working Version
 School Board Name: First Training DSB
 School Year: 2013-14
 Cycle: Estimates

Section 1A - Summary of Allocations

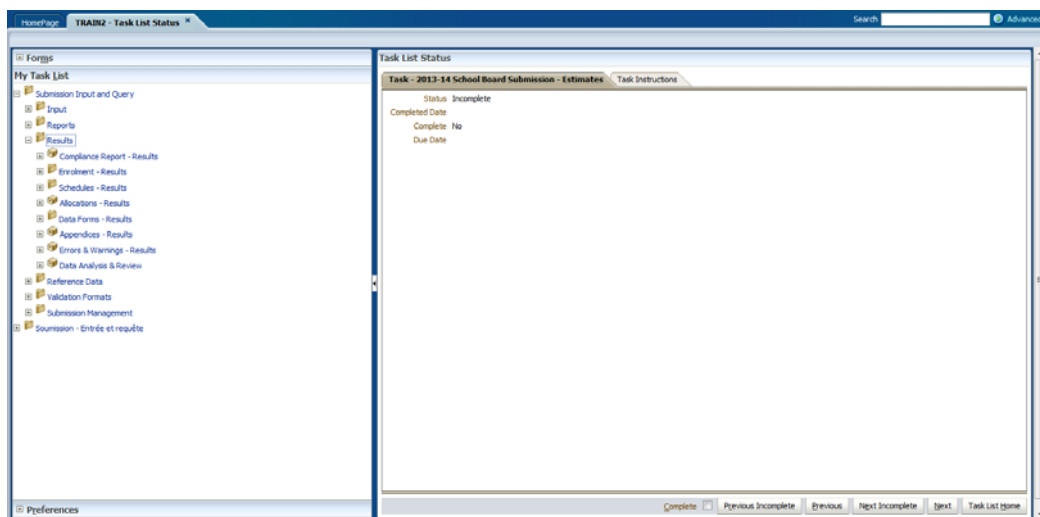
Page: V10W, 800001
OPERATING ALLOCATION

Item	Description	Amount
14	General Operating Allocation (Prior to Capital Adjustment and Interest Portion)	
14.1.1	Pupil Foundation Allocation	46,046,026
15.1.1.1	School Foundation Allocation	9,496,726
16.1.2	Special Education Allocation	15,173,757
17.1.3	Language Allocation	1,342,951
18.1.4	Supported School Allocation	3,262,647
19.1.5	Remote and Rural Allocation	6,620,444
20.1.5.1	Rural and Small Community Allocation	20,664
21.1.6	Learning Opportunities Allocation	2,041,929
22.1.7	Continuing Education Allocation and Other Program	673,692
23.1.8	Cost Adjustment and Teacher Qualification Allocation	7,748,979
24.1.8.1	New Teacher Induction Program (NTIP)	80,564
25.1.8.2	Restraint Savings Allocation	-112,150
26	--- (Table 14, Col 2, 2013-14 Grant Reg 69.1 x \$10,000,000/6,161.30 x -1	
27.1.9	Transportation Allocation	7,822,630
28.1.10	Administration and Governance Allocation	4,047,192
29.1.11	School Operations Allocation	12,664,233
30.1.12	Community Use of Schools Allocation	188,321
31.1.13	Declining Enrolment Adjustment	876,152
32.1.14	First Nations, Metis and Inuit Supplemental Allocation	1,005,181
33.1.15	Safe Schools Allocation	284,542
34.1.16	Permanent Financing of NFF	0
35.1.17	General Operating Allocation (Prior to Capital Adjustment)	119,284,460
36	--- (Sum of Items 1.1.1 to 1.16)	
37		
38.1.18	Minor Tangible Capital Assets Capital Adjustment (Calculated as 2.5% of item 1.17)	2,982,112
39.1.19	Temporary Accommodation - Relocation and Leasing (Schedule 5.1 Deferred Revenue Capital, item 2.5, col 6)	0
40.1.19.1	FDK - portable relocation and leasing (Section 11, Item 11.90.14.10)	0
41.1.20	Total Operating Allocation (Before Savings From Strike or Lock-Out)	116,302,368
42	--- Item 1.17 less Item 1.16 plus Items 1.19 and 1.19.1	
43		

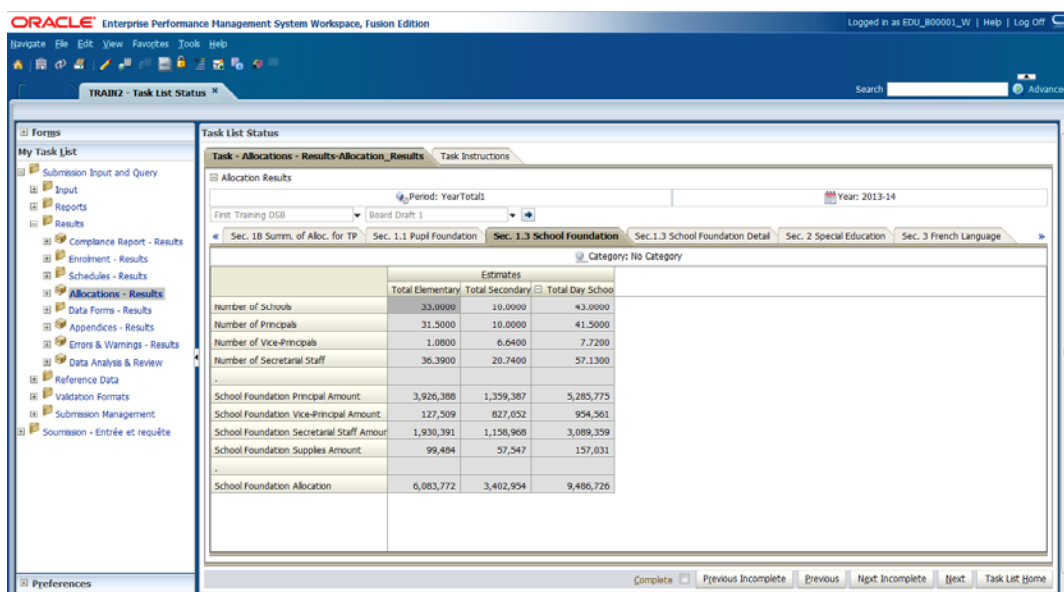
5.4 Results

5.4.1 Viewing Results in a Form

To access and view the result forms, select the **Results** folder in the Task bar. Results are grouped into following areas: Compliance Report, School Level Data, Schedules, Allocations (Sections), Data Forms, Appendices, Errors & Warnings and Data Analysis & Review.

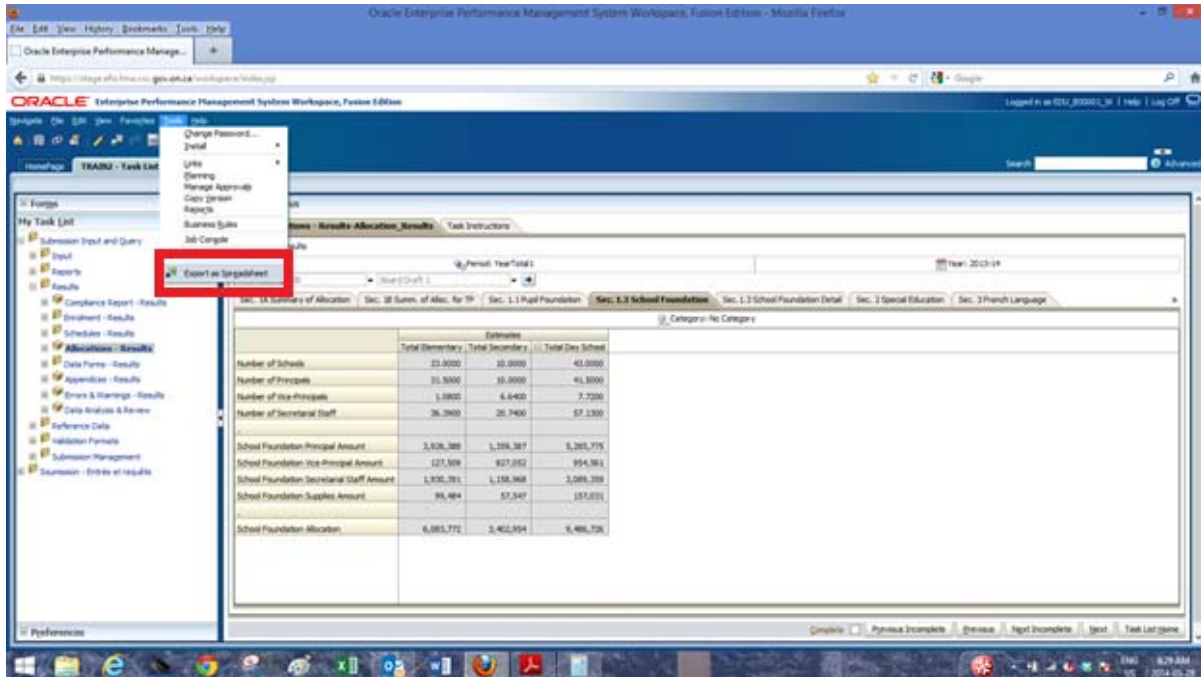


Select a form to view the results. Below is an example of the Allocation (Sections) Results form. Similar to the Allocations Input form, all allocations has been combined into one form with multiple tabs. Both Board Level and School Level results are available for review

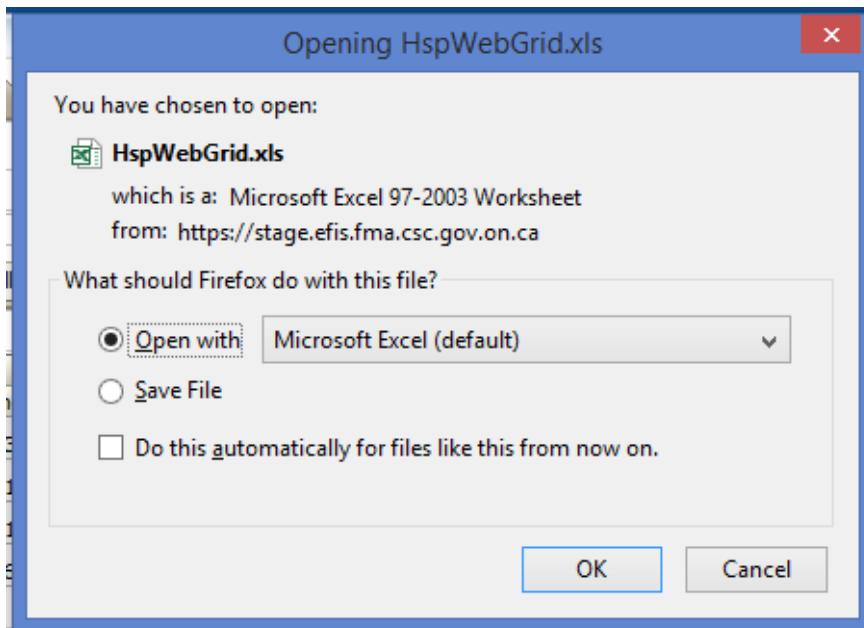


5.4.2 Viewing Results in Excel

Results forms can also be viewed and saved in Excel. To open a Results form in Excel select **Tools** → **Export as Spreadsheet**



Select **Open with** or **Save**



Results Form will open in Excel.

HspWebGrid [Read-Only] - Excel

	B	C	D	E	F
	First Training DSB	Board Draft 1	YearTotal1	2013-14	No Category
	Estimates	Estimates	Estimates		
	Total Elementary	Total Secondary	Total Day School		
Number of Schools	33	10	43		
Number of Principals	31.5	10	41.5		
Number of Vice-Principals	1.08	6.64	7.72		
Number of Secretarial Staff	36.39	20.74	57.13		
School Foundation Principal Amount	3926388	1359387	5285775		
School Foundation Vice-Principal Amount	127509	827052	954561		
School Foundation Secretarial Staff Amount	1930391	1158968	3089359		
School Foundation Supplies Amount	99484	57547	157031		
School Foundation Allocation	6083772	3402954	9486726		

5.5 Reference Data

In EFIS 2.0 users are able to view Table amounts and Benchmarks related to their school board in one place. Table amount and Benchmarks are grouped under Reference Data. School Boards will be able to view changes to reference data as well.

All **Benchmarks & Table Amounts** data has been consolidated into one form with multiple tabs.

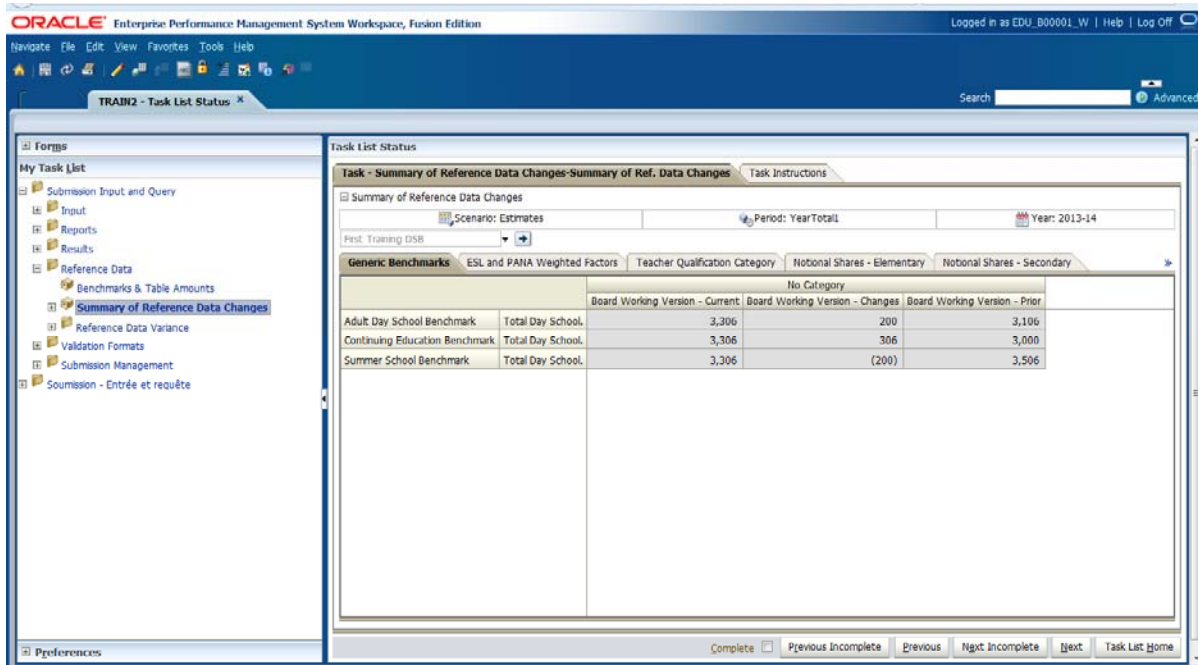
		No Category
Pupil Foundation Per Pupil Benchmark :		
JK - Grade 3 :		5,365.68
Grades 4 to 8		4,471.51
Secondary		5,678.85
Enrolment range for Principal Start		
Default - Elem Range 1		0
Default - Elem Range 2		1
Default - Elem Range 3		50
Default - Elem Range 4		300
Sec Range 4		500
Enrolment range for Principal End		
Default - Elem Range 1		1
Default - Elem Range 2		50
Default - Elem Range 3		300
Sec Range 3		500
Principals Base Benchmark - FTE		
Default - Elem Range 1		0
Default - Elem Range 2		0.5
Default - Elem Range 3		1

Information included on this form includes

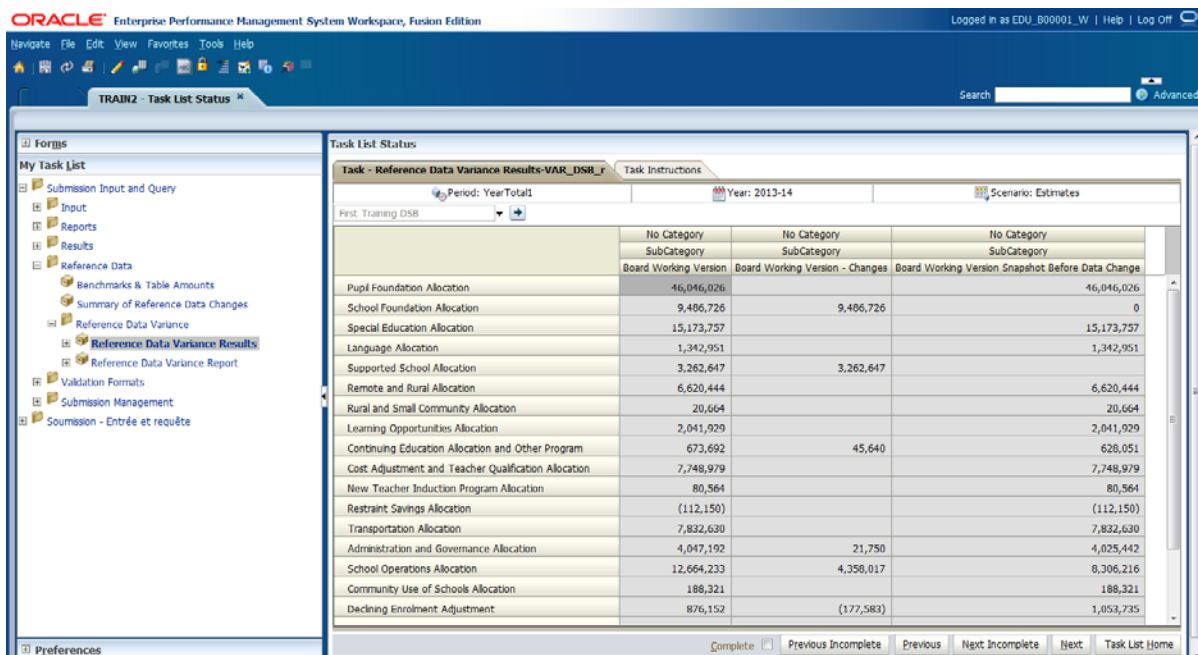
- Generic Benchmarks
- ESL and PANA Weighted factors
- Teacher Qualification Category
- Notional Shares – Elementary
- Notional Shares – Secondary
- Table Amounts
- Approved Amounts

During a reporting cycle Reference data (Benchmarks, Table Amounts) may change. EFIS 2.0 has added a set of forms to allow the user to view changes to Benchmarks and Table Amounts. There are 3 forms in the Reference Data Versioning folder and a report

During a cycle changes may occur that effect the Reference Data. To provide the users with information about what has changed the **Summary of Reference Data Changes** form is available and displays changes that have been made to specific reference data



To view the impact of changes on the boards Allocations a **Reference Data Variance Results** form and the corresponding report are available. To view the changes in a form select **Reference Data Variance Results**. To view, save or print a report in a PDF select the **Reference Data Variance Report**.



6 Smart View

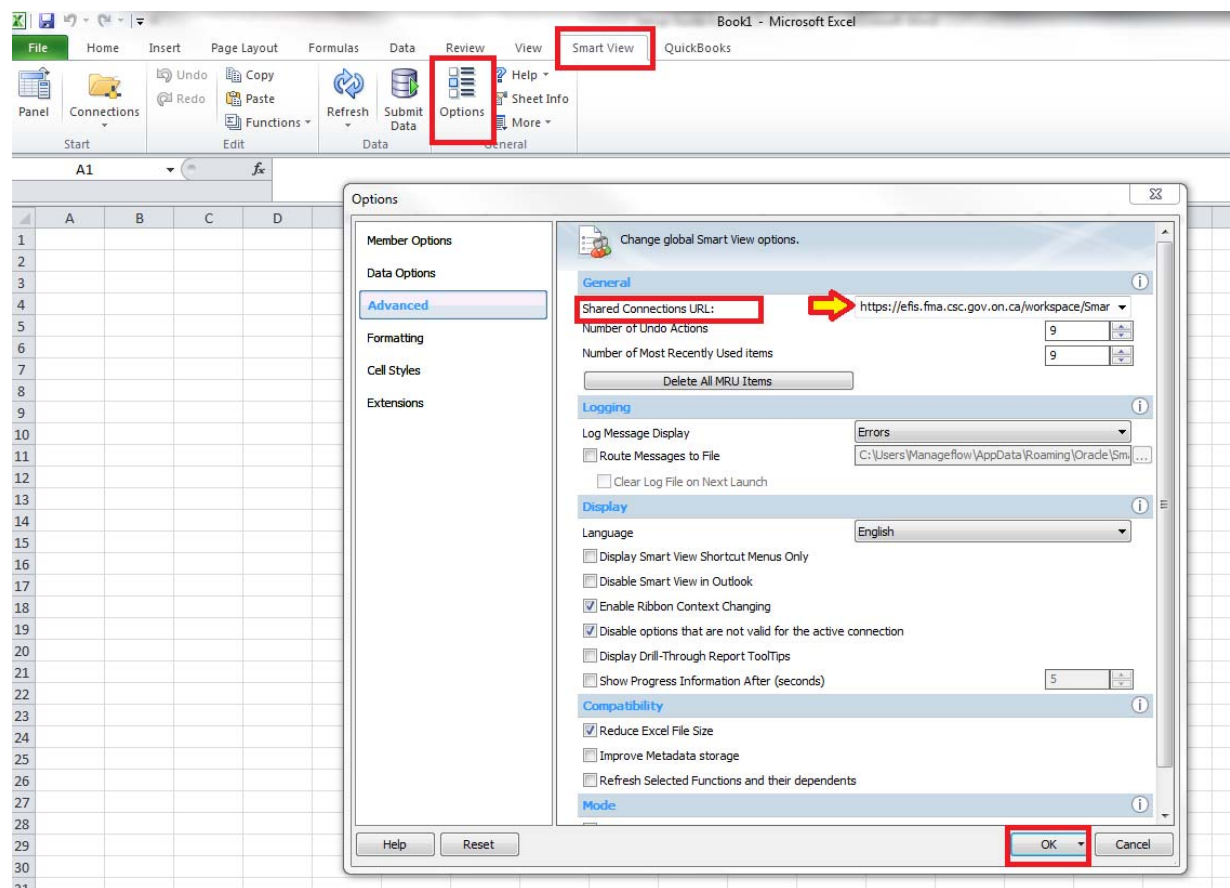
6.1 Smart View User Set Up

The Smart View is an Excel add-on that allows user to enter data into EFIS 2.0. Web forms or Smart view have same functionality. In order to use Smart View (add-in for Oracle Hyperion EPM products), the add-in needs to be installed on users workstation. Please refer to **EFIS 2.0 – User Set Up Guide** for detailed instructions.

6.1.1 Setting up the Connection

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

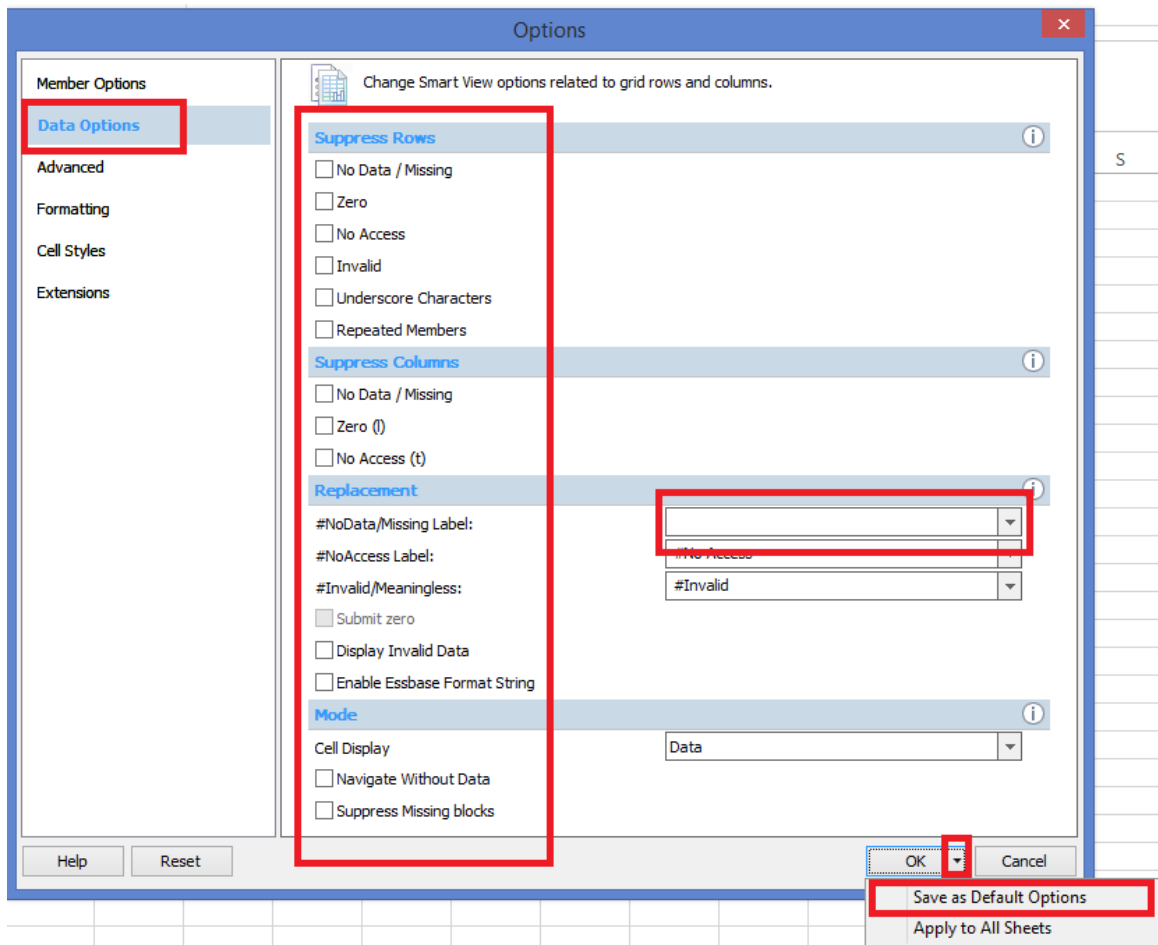
<https://efis.fma.csc.gov.on.ca/workspace/SmartViewProviders>



6.1.2 Setting up Smart View Options

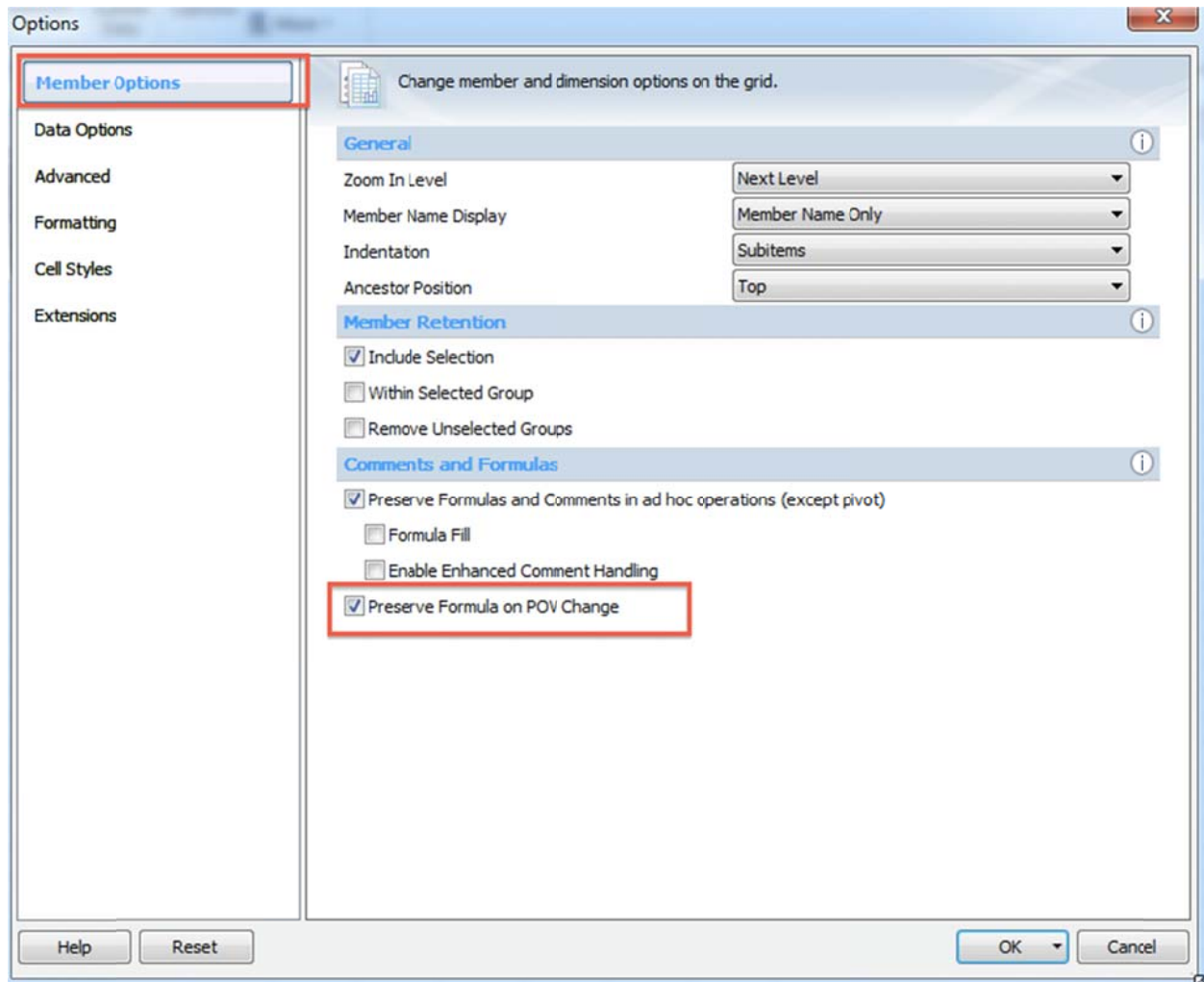
6.1.2.1 Data Options

In Smart View, go to **Options**, Click on **Data Options**. Check to make sure that no boxes are checked, clear the **#NoData/Missing Label**: to be blank, select the arrow on the right of the **OK** button and select **Save as Default Options**



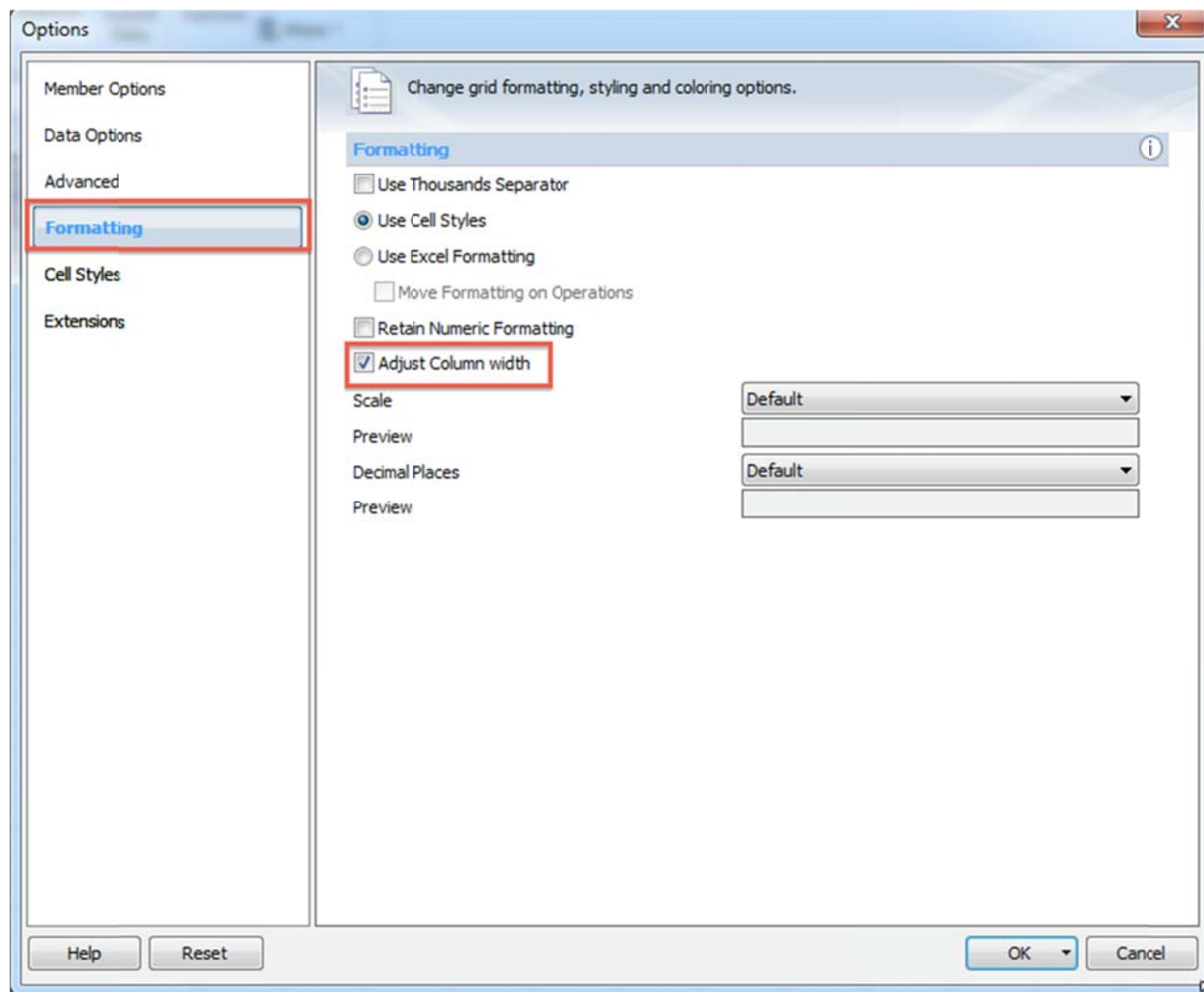
6.1.2.2 Member Options

To retain formulas that have been added to a Smart View form when moving between versions, it is recommended that the **Preserve Formula on POV Change** is checked



6.1.2.3 Formatting

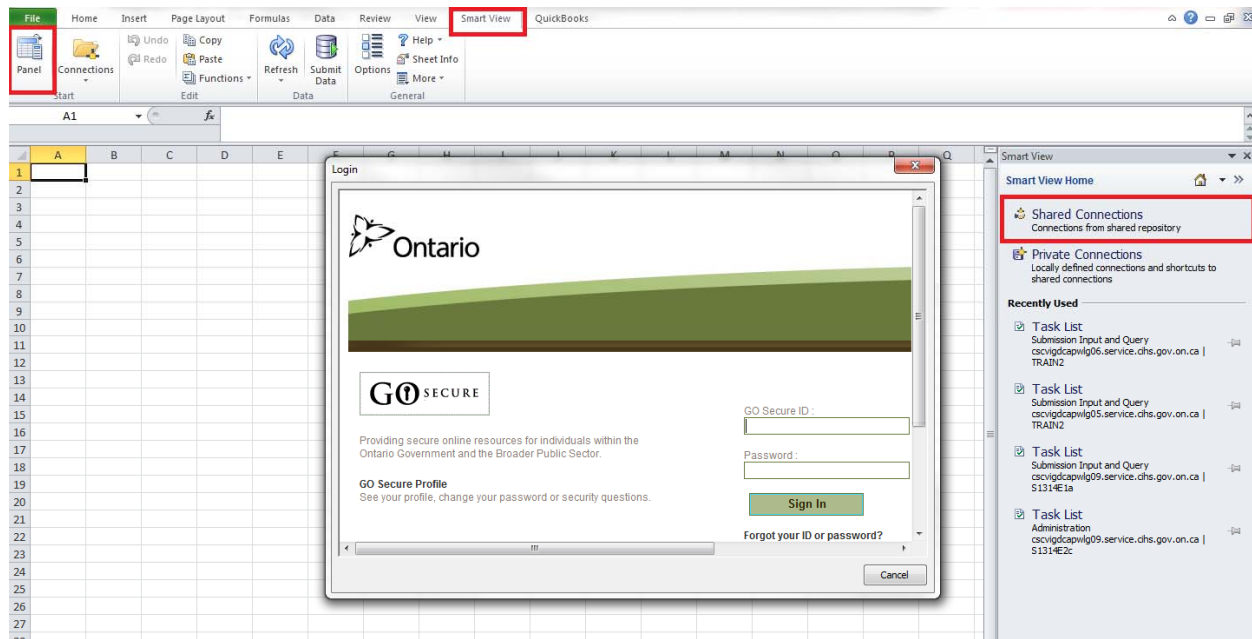
In order to format columns and rows user needs to set the formatting as per below example



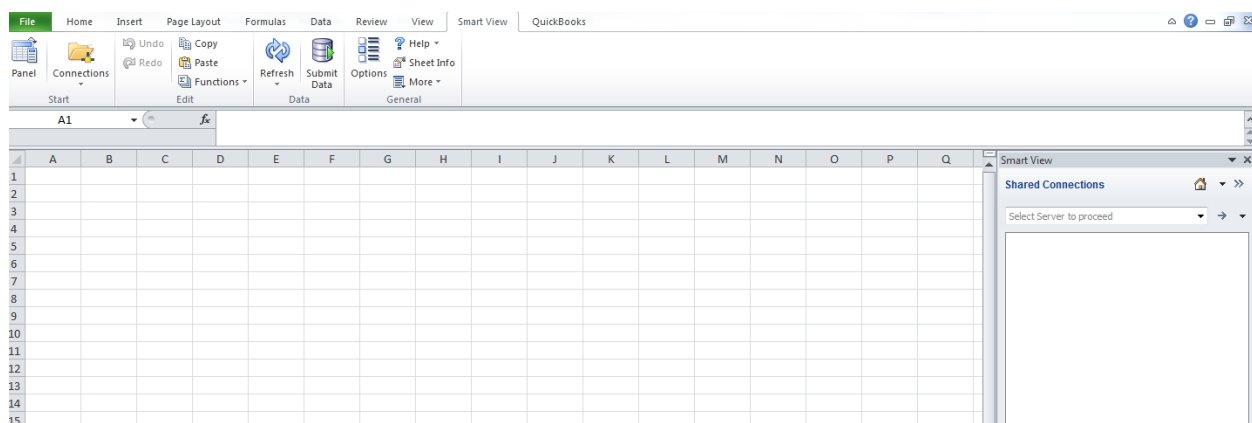
Select the arrow on the right of the **OK** button and select **Save as Default Options**.

6.1.3 Connecting Smart View to Database

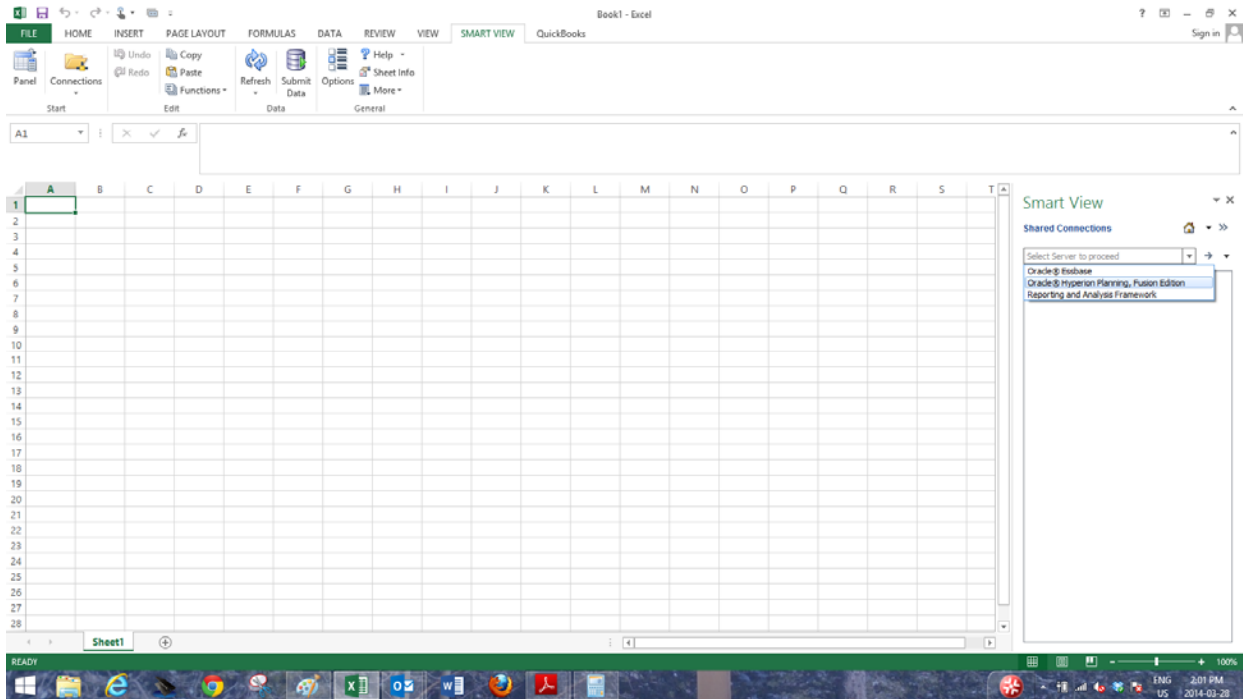
To access forms in the Smart View open a new session of Excel and click on **Smart View** tab. Select **Panel** and **Shared Connections**. The Go Secure Login screen will be displayed, enter your **user name** and **password** and select **Sign In**.



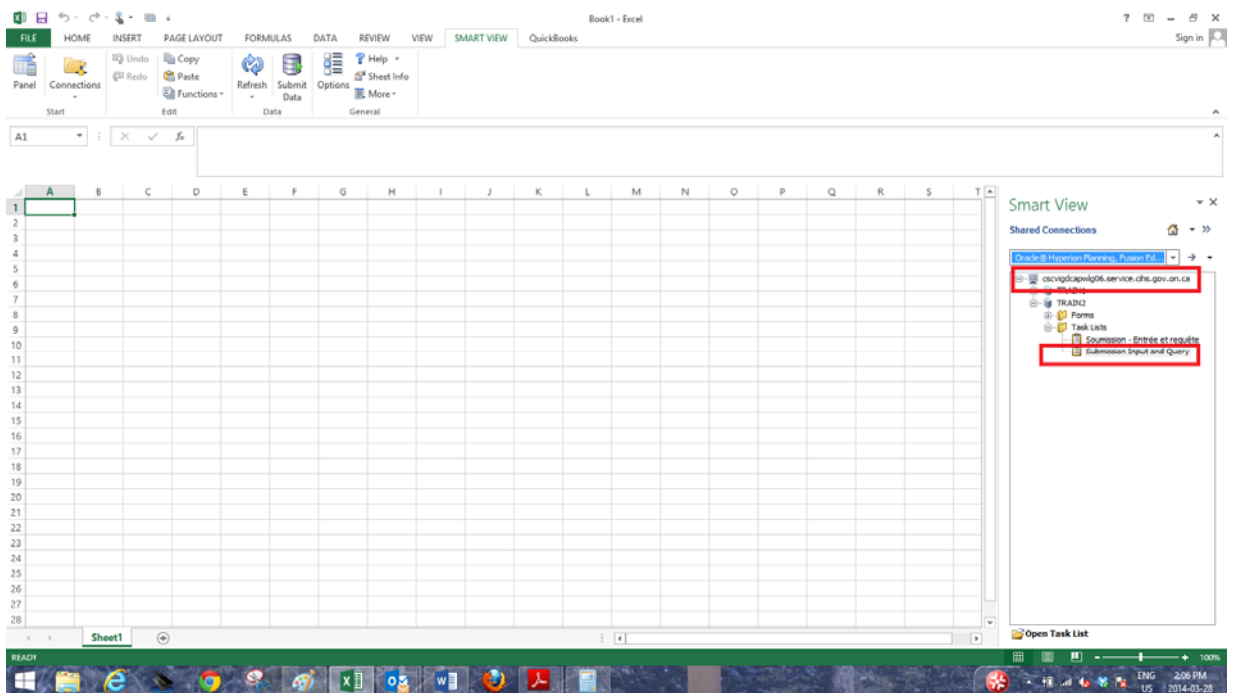
When the user has successfully connected to the database the following will be displayed.



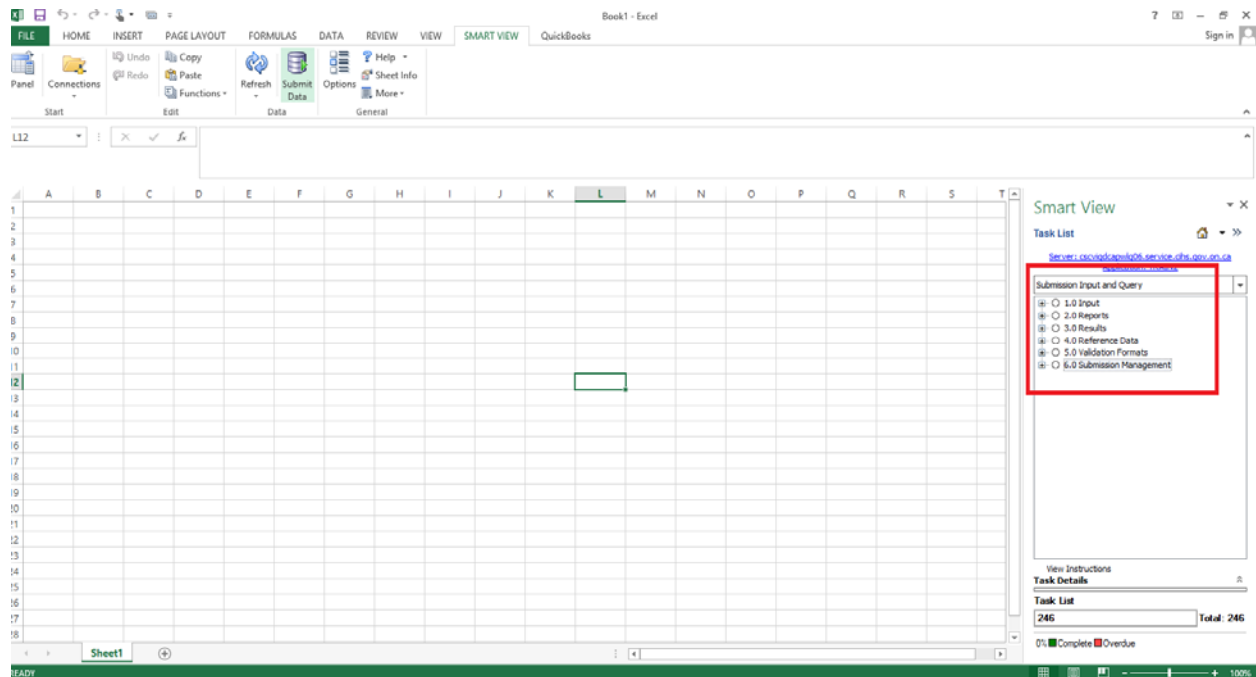
To navigate to the Task List to access forms select **Oracle Hyperion Planning Fusion Edition** from the Shared Connections drop down list



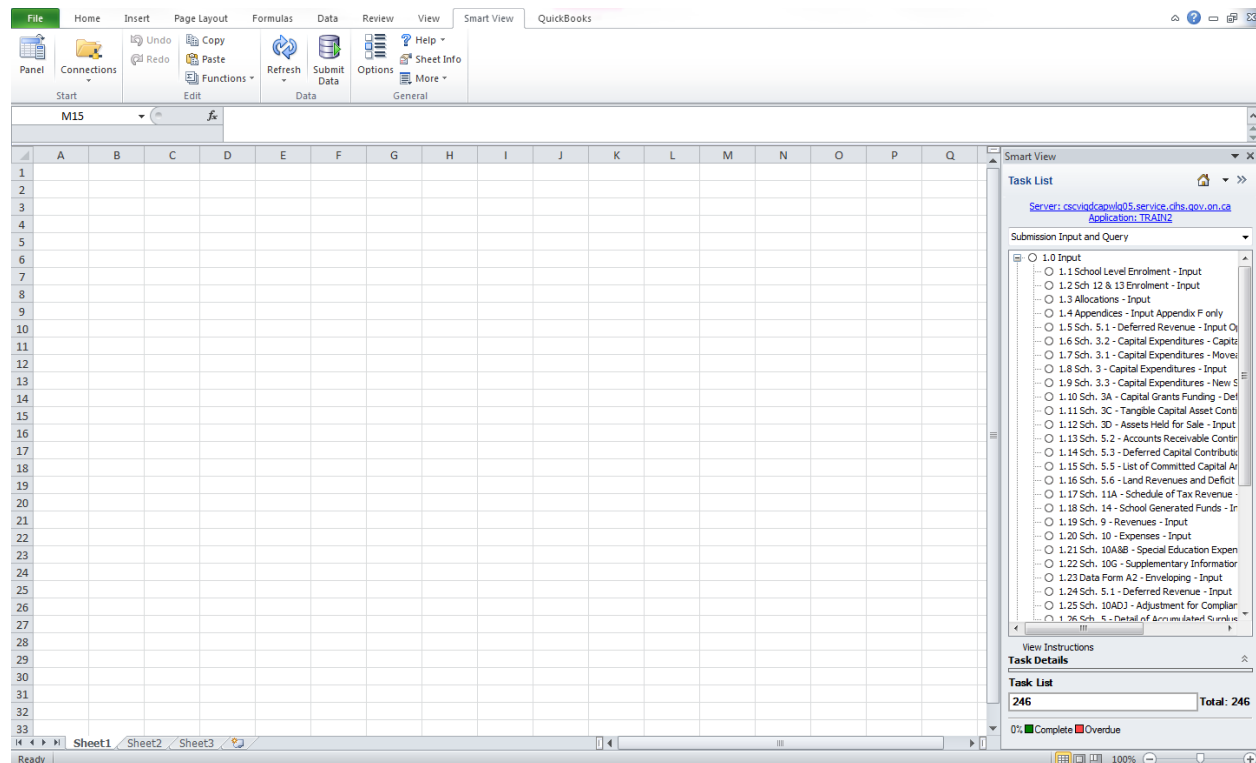
Expand the Database, expand the Application to access (i.e. Train2), expand the Task List, and then double click on the Task List to display tasks



The Task List is displayed and forms can be accessed by expanding the Task List. Reports cannot be run from within Smart View. The user must return the Planning Application to generate reports.




Example of expanded Task List

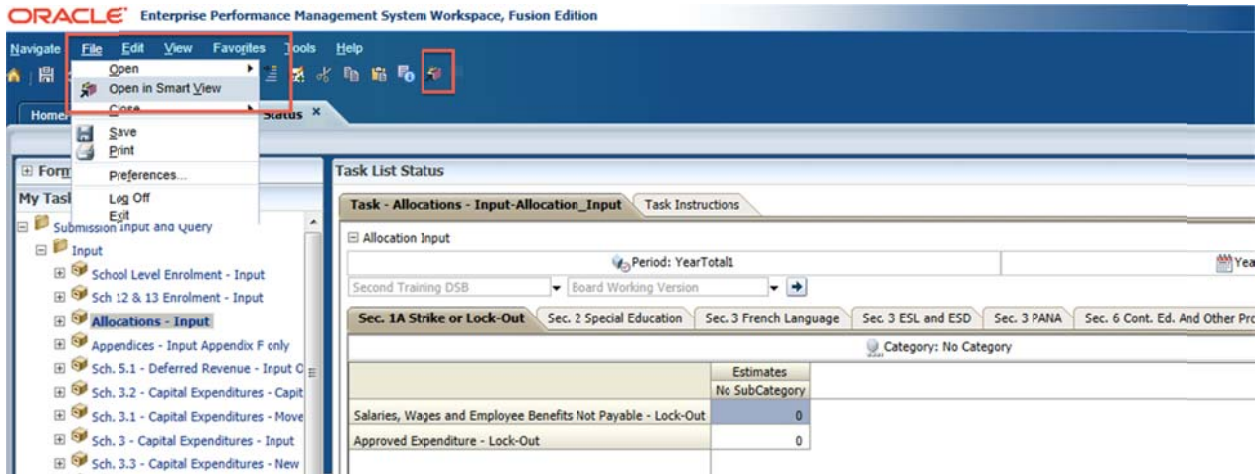


6.1.4 Alternative way to open Smart View form via planning application

In the planning application user can open the form directly into the Smart View.

To do so user needs to be in the form that wants to export in the Smart View. Next step is to click on

File → Open in Smart View, or user can click on the toolbar icon for Smart View 



When opening Smart View via planning, security settings can force browser to display the question if you want to proceed with opening. In the Firefox click **Continue**. Also see the Appendix A to see some additional settings in Firefox

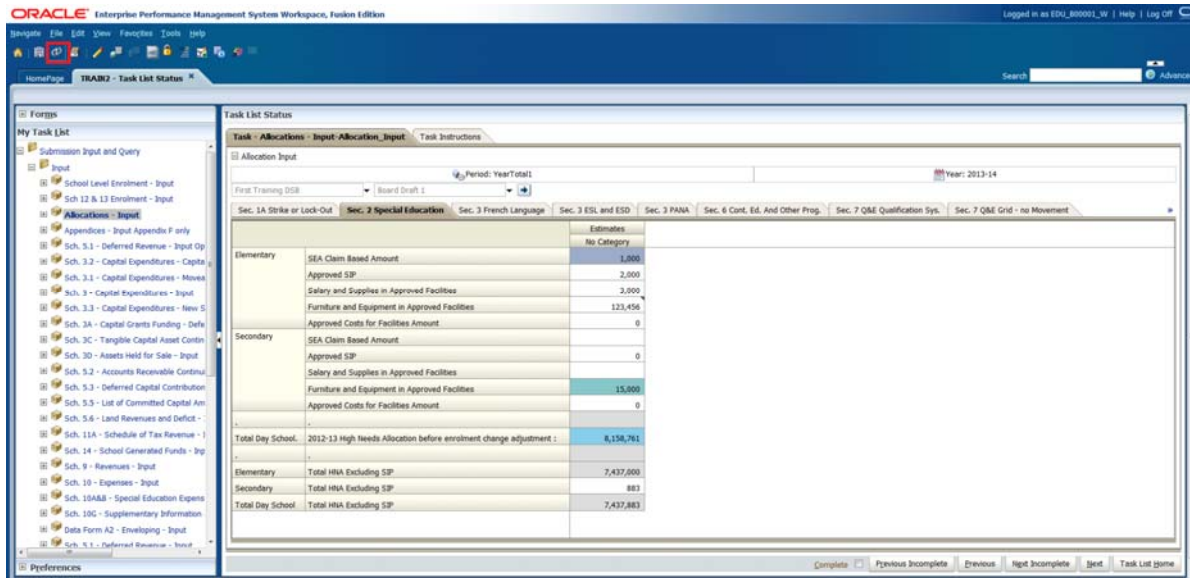
6.2 Data Input

Select the form from the Task List and enter data. The system highlights input values in yellow until they are saved to the database.

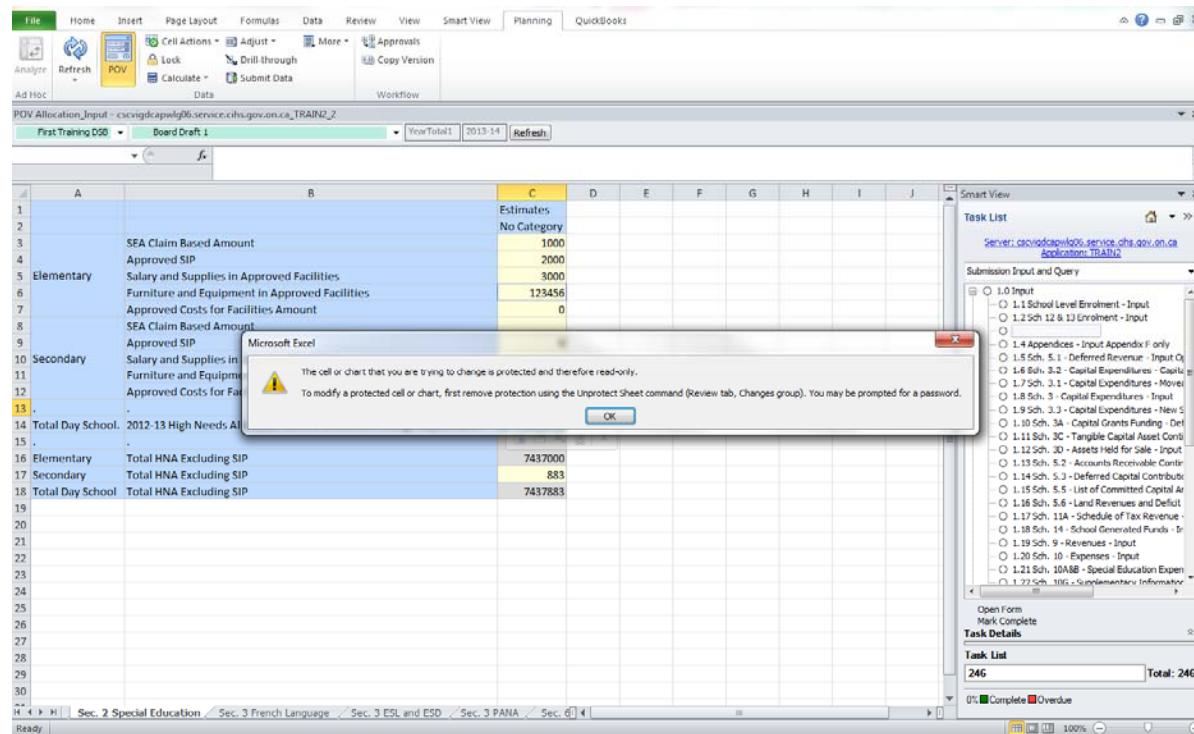
	A	B	C	D	E	F	G	H	I	J
1			Estimates							
2			No Category							
3		SEA Claim Based Amount	1000							
4		Approved SIP	2000							
5	Elementary	Salary and Supplies in Approved Facilities	3000							
6		Furniture and Equipment in Approved Facilities	123456							
7		Approved Costs for Facilities Amount	0							
8		SEA Claim Based Amount	0							
9		Approved SIP	0							
10	Secondary	Salary and Supplies in Approved Facilities	15000							
11		Furniture and Equipment in Approved Facilities	0							
12		Approved Costs for Facilities Amount	0							
13										
14	Total Day School	2012-13 High Needs Allocation before enrolment change adjustment :	8158761							
15										
16	Elementary	Total HNA Excluding SIP	7437000							
17	Secondary	Total HNA Excluding SIP	883							
18	Total Day School	Total HNA Excluding SIP	7437883							
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30										

Select **Submit Data** icon and a saving message screen is displayed.

To see the saved data in a Web Form, open the same allocation in Web Form. If the Web Form is already open select the **Refresh** button.



If a user tries to enter data into gray cell following message is displayed:



6.3 Input data validation

Data validation for Smart View work the same way as for Web forms. The cells in red are the cells with incorrect data. Cells that have invalid data will be listed on the bottom right panel.

The screenshot displays an Excel spreadsheet with a 'Smart View' task list panel on the right. The spreadsheet data is as follows:

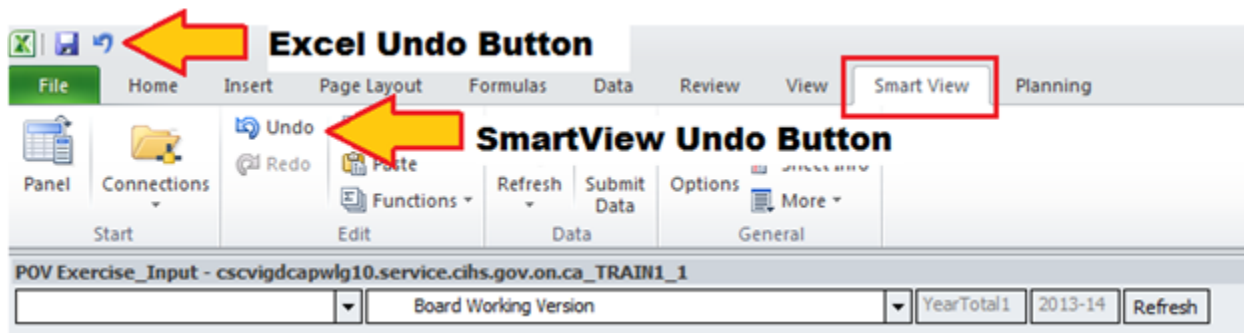
	A	B	C	D	E	F	G	H	I	J
1			Estimates							
2			No Category							
3		SEA Claim Based Amount								
4		Approved SIP								
5	Elementary	Salary and Supplies in Approved Facilities	3,000							
6		Furniture and Equipment in Approved Facilities	123,456							
7		Approved Costs for Facilities Amount	0							
8		SEA Claim Based Amount								
9		Approved SIP	0							
10	Secondary	Salary and Supplies in Approved Facilities								
11		Furniture and Equipment in Approved Facilities	15,000							
12		Approved Costs for Facilities Amount	0							
13		.								
14	Total Day School	2012-13 High Needs Allocation before enrolment change adjustment :	8,158,761							
15		.								
16	Elementary	Total HNA Excluding SIP	7,437,000							
17	Secondary	Total HNA Excluding SIP	883							
18	Total Day School	Total HNA Excluding SIP	7,437,883							

The 'Smart View' task list panel on the right shows a 'Data Validation' section with a red border, containing the following text:

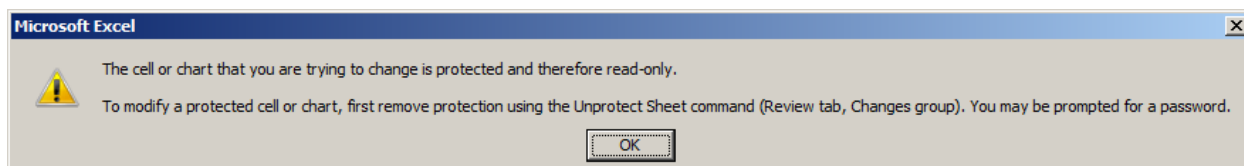
- Invalid input type. Please check highlighted cell(s).
- Cell: C4
- Cell: C3

6.4 Advanced Smart View Functionality

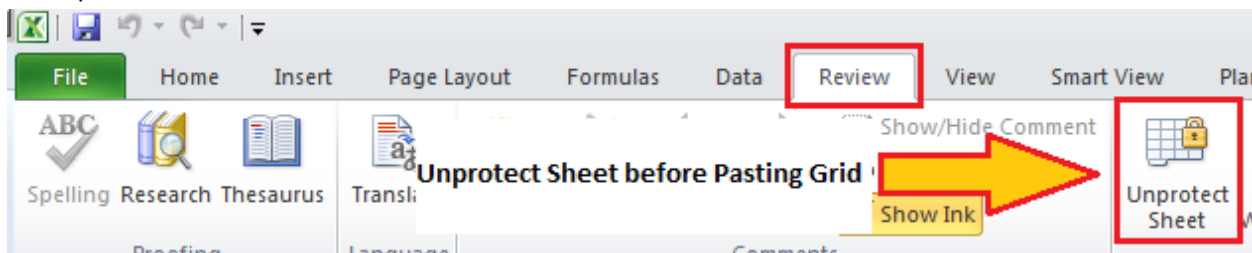
To undo data entry in Smart View, the **undo button** in the **Smart View ribbon** must be used, the Excel menu undo button will **not** perform this function.



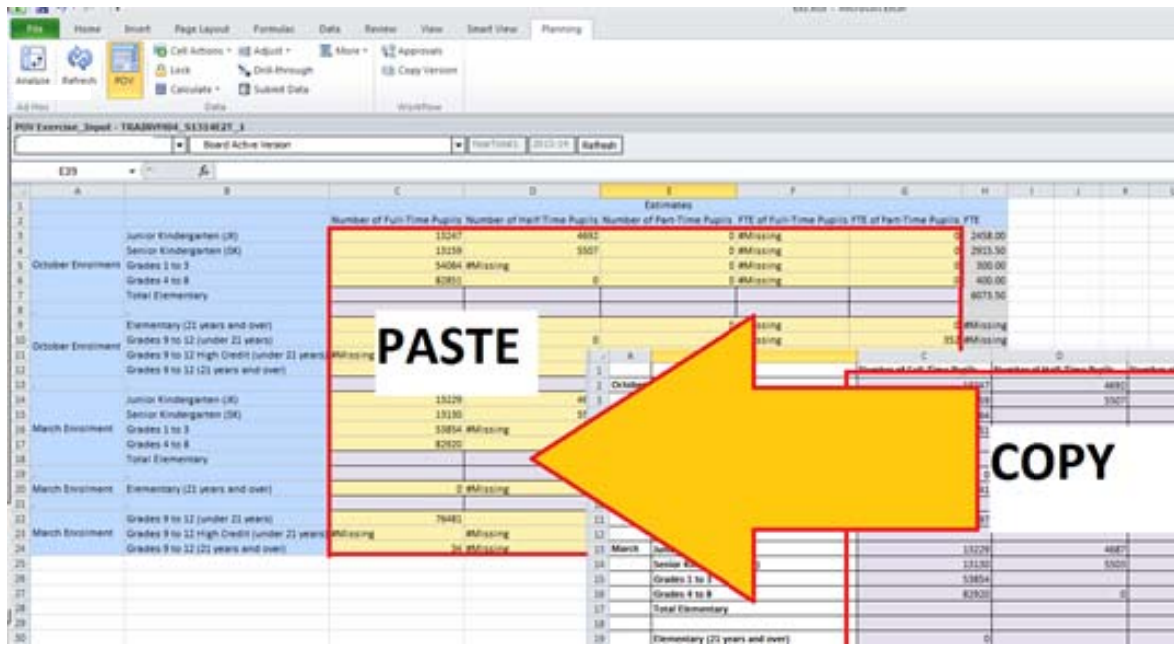
When attempting to paste a data grid without unprotecting the worksheet the following error will be displayed, to allow the data to be copied the user must select the **Review- Unprotect Sheet button**



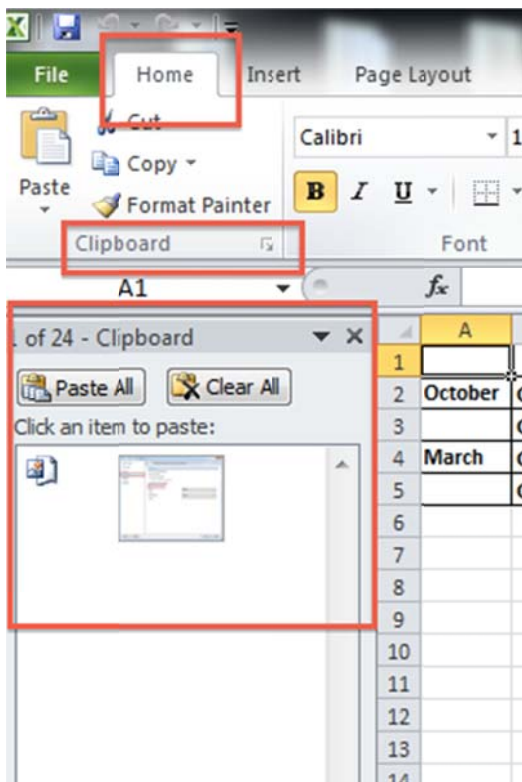
To Unprotect Sheet



Once the sheet is unprotected data in the form of a grid can be copied and pasted into the Smart View form.



User can use Clipboard functionality to Copy/Paste. To turn on please click on the expand arrow.



Formulas can be added to any input cell on a Smart View form

The screenshot shows the Hyperion Planning interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Smart View, and Planning. The active sheet is 'POV Exercise_Input - TRAINVM04_S1314E2T_1'. The formula bar for cell C17 displays the formula $=C6*1.05$, with a red arrow pointing to it and the text 'Excel Formula'. The Smart View pane on the right shows a tree view of connections, with a red arrow pointing to the 'Current Document' section.

	A	B	C
13	.	.	
14	.	Junior Kindergarten (JK)	105.00
15	.	Senior Kindergarten (SK)	210.00
16	March Enrolment	Grades 1 to 3	315.00
17		Grades 4 to 8	420.00
18		Total Elementary	1050.00
19	.	.	
20	March Enrolment	Elementary (21 years and over)	#Missing
21	.	.	
22	.	Grades 9 to 12 (under 21 years)	#Missing
23	March Enrolment	Grades 9 to 12 High Credit (under 21 years)	#Missing
24		Grades 9 to 12 (21 years and over)	#Missing
25			
26			
27			
28			

Data can be linked in from other Excel Workbooks

The screenshot shows the Hyperion Planning interface with a formula in cell C14. The formula bar displays the formula $=C:\Users\Admin\Dropbox\EDU Phase 1\70 Training\Board Training Documents\05 Ex. :$. A red arrow points to the formula bar, and a text box with the text 'Formula for linking data from other Excel Workbooks' is overlaid on the spreadsheet. The Smart View pane on the right is also visible.

	A	B	C	D
13	.	.		
14	.	Junior Kindergarten (JK)	4809.00	
15	.	Senior Kindergarten (SK)	5625.00	
16	March Enrolment		315.00	
17			420.00	
18			1050.00	
19	.	.		
20	March Enrolment	Elementary (21 years and over)	#Missing	
21	.	.		

Smart View workbooks can be saved and the data can be submitted at a later point

Saved Workbook

Connection Re-established upon re-opening

	B	C
1		
2		Number of Full-Time Pupils
3	Junior Kindergarten	100.00
4	Senior Kindergarten	200.00
5	Grades 1 to 3	300.00
6	Grades 4 to 8	400.00
7	Total Elementary	1000.00
8	.	
9	Elementary (21 years and over)	#Missing
10	Grades 9 to 12 (under 21 years)	#Missing

7 Submission Management

7.1 Overview of Versions

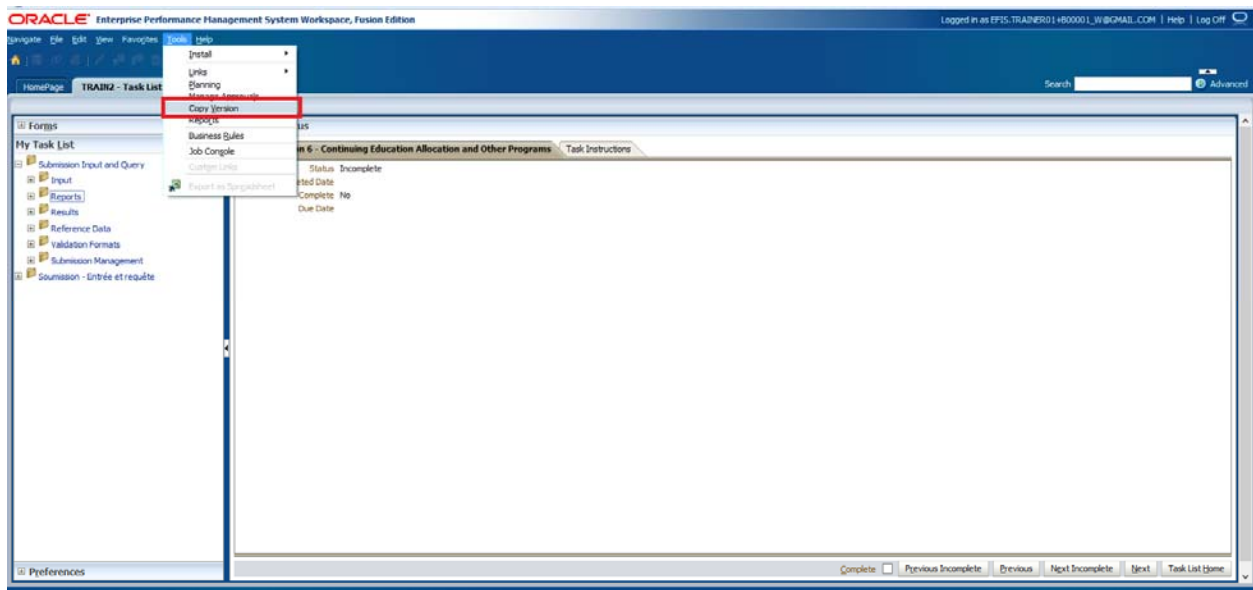
Submission management allows board users to manage the versions or submissions that they are working on. The tools provided give the user the ability to copy data between versions (such as the working version and the drafts) and to promote the version for review as needed (using the Workflow / Approvals Management process). The chart below lists all versions

Board Versions			
V10W	Board Working Version ***	This version allows the Board User to work on their submission by entering data and running calculations. Although data can be copied to and from this version, this is the only version which can be verified and promoted in the Approvals module. *** Once the submission has been promoted, the access to this version changes to READ, meaning that the version cannot be copied to.	Versions Board User can write to
V10D01	Board Draft 1	Draft versions are also versions that the user can manipulate data in. They are used during the submission process to manage data changes and keep back-ups when needed. However, if a draft version is the final version that the user wishes to submit, they must copy the data into Board Working Version	
V10D02	Board Draft 2		
V10D03	Board Draft 3		
V10D04	Board Draft 4		
V10D05	Board Draft 5		
V10D06	Board Draft 6		
V10D07	Blank Template for Reset	Used as a blank draft that can be used to clear or reset data in a version	
V10FOV	Board FO Viewable Version	Version for review by FO. The FO does not have access to view Board Working Version. If a Board User needs the FO to review the data in that version for any reason, they would copy the data into "FO Viewable Version". This allows for the FO to review and give feedback to the Board User.	
Board Versions			
V10ERO	Board Error Override Version	Used at the point where Approver submits data that has errors but is tagged as "Error Override"	Versions Board User can read from
V10	Board Active Version	The final version which is submitted to the Ministry. Once the Board User promotes the Board Working version, an approver is responsible for approving the data and promoting it to the Board Active Version.	
V10I01	Board Inactive Version 1	Versions used as a historical / audit record of previously active versions.	
V10I02	Board Inactive Version 2		
V10I03	Board Inactive Version 3		
V10I04	Board Inactive Version 4		
V10I05	Board Inactive Version 5		
V10I06	Board Inactive Version 6		
V10I07	Board Inactive Version 7		
V10I08	Board Inactive Version 8		
V10I09	Board Inactive Version 9		
FO Versions			
V20	FO Active Version	The final version which is submitted by the Ministry for payout purposes.	
Release Management Versions			
V10WDC	Board Working Version Snapshot Before Data Change	Used to store a snapshot / backup during a reference data change process	
Variance Versions			
V10WDV	Board Working Version - Changes	Shows the difference between the Current Board Working Version (V10W) and the Prior Board Working Version (Snapshot)	
V10W_Cur	Board Working Version - Current	Shows the data from the Current Board Working Version (V10W)	
V10WDC_Cur	Board Working Version - Prior	Shows the data from the Prior Board Working Version (V10WDC / Snapshot)	

The user is able to write to all the versions in the list that are coloured purple. The data can then be copied from one version to another as need be (i.e. if the user wants to create a “backup” of a certain version they can copy it to a draft or when the user needs to push data into the FO Viewable version for an FO to review it). However, only the data in Board Working Version can be promoted during the approval process. When the user is ready to submit the data they must make sure that the correct data sits in Board Working Version. Any data management and movement are done by using the Copy Version process.

7.1.1 Copy Data Between Versions

To copy data between versions, the user selects **Tools** → **Copy Version**



The following Copy Version screen is displayed

The screenshot shows the 'Copy Version' interface. At the top, there's a title bar 'Copy Version'. Below it is the 'Planning Units' section with the instruction: 'Select a scenario, source version, and destination version. Then click Go to retrieve the list of entities.' There are three dropdown menus: '* Scenario' (currently showing '<Select Scenario>'), '* Copy From' (showing '<Select Version>'), and '* Copy To' (showing '<Select Version>'). Below these are two empty boxes: 'Available Entities' on the left and 'Selected Entities' on the right. Between them are four arrow buttons: 'Move', 'Move All', 'Remove', and 'Remove All'. At the bottom left, there are four unchecked checkboxes: 'Copy Account Annotations', 'Copy Comments', 'Copy Documents', and 'Copy Supporting Details'. A 'Copy Data' button is at the bottom right.

Select the **Scenario** related to the application (Cycle) the user is working in. (Although other cycles are shown in the drop down box – they are not applicable and nothing will be copied if one of them is selected).

This screenshot is similar to the previous one but with the '* Scenario' dropdown menu open. The menu is highlighted with a red box and contains the following options: '<Select Scenario>', '<Select Scenario>', 'Estimates', 'Financial Statements', 'No Scenario', and 'Revised Estimates'. A tooltip labeled 'Scenario' is visible above the dropdown. The rest of the interface, including the 'Available Entities' and 'Selected Entities' boxes, the arrow buttons, and the checkboxes, remains the same as in the previous screenshot.

Select **Copy From** Version (Board User sees list of scenarios they have read access to)

The screenshot shows the 'Copy Version' interface. At the top, it says 'Planning Units' and 'Select a scenario, source version, and destination version. Then click Go to retrieve the list of entities.' Below this are three dropdown menus: '* Scenario' (set to '<Select Scenario>'), '* Copy From' (set to '<Select Version>'), and '* Copy To' (set to '<Select Version>'). The '* Copy From' dropdown is open, showing a list of version codes: V10, V10D01, V10D02, V10D03, V10D04, V10D05, V10D06, V10D07, V10ERO, V10FOV, V10I01, V10I02, V10I03, V10I04, V10I05, V10I06, V10I07, V10I08, V10I09, V10W, V10WAC, V10WAV, V10WDC, V10WDV, V20, and V99. A red box highlights this list. Below the dropdowns are two empty boxes: 'Available Entities' and 'Selected Entities'. On the left, there are four checkboxes: 'Copy Account Annotations', 'Copy Comments', 'Copy Documents', and 'Copy Supporting Details'. On the right, there is a 'Copy Data' button. A 'Copy From' tooltip is visible over the dropdown menu.

Select **Copy To** Version (Board User sees list of scenarios they have write access to)

The screenshot shows the 'Copy Version' interface. At the top, it says 'Planning Units' and 'Select a scenario, source version, and destination version. Then click Go to retrieve the list of entities.' Below this are three dropdown menus: '* Scenario' (set to '<Select Scenario>'), '* Copy From' (set to 'V10W'), and '* Copy To' (set to 'V10D01'). The '* Copy To' dropdown is open, showing a list of version codes: V10D01, V10D02, V10D03, V10D04, V10D05, V10D06, V10D07, V10FOV, and V10W. A red box highlights this list. Below the dropdowns are two empty boxes: 'Available Entities' and 'Selected Entities'. Between these boxes are four buttons: 'Move', 'Move All', 'Remove', and 'Remove All'. On the left, there are four checkboxes: 'Copy Account Annotations', 'Copy Comments', 'Copy Documents', and 'Copy Supporting Details'. On the right, there is a 'Copy Data' button. A 'Copy To' tooltip is visible over the dropdown menu.

Click the **GO**  button.

Under **Available Entities** you will see the school board that user is responsible for.

Copy Version

Planning Units

Select a scenario, source version, and destination version. Then click Go to retrieve the list of entities.

* Scenario: Estimates * Copy From: V10W * Copy To: V10D01 [Go]

Available Entities

- B28010

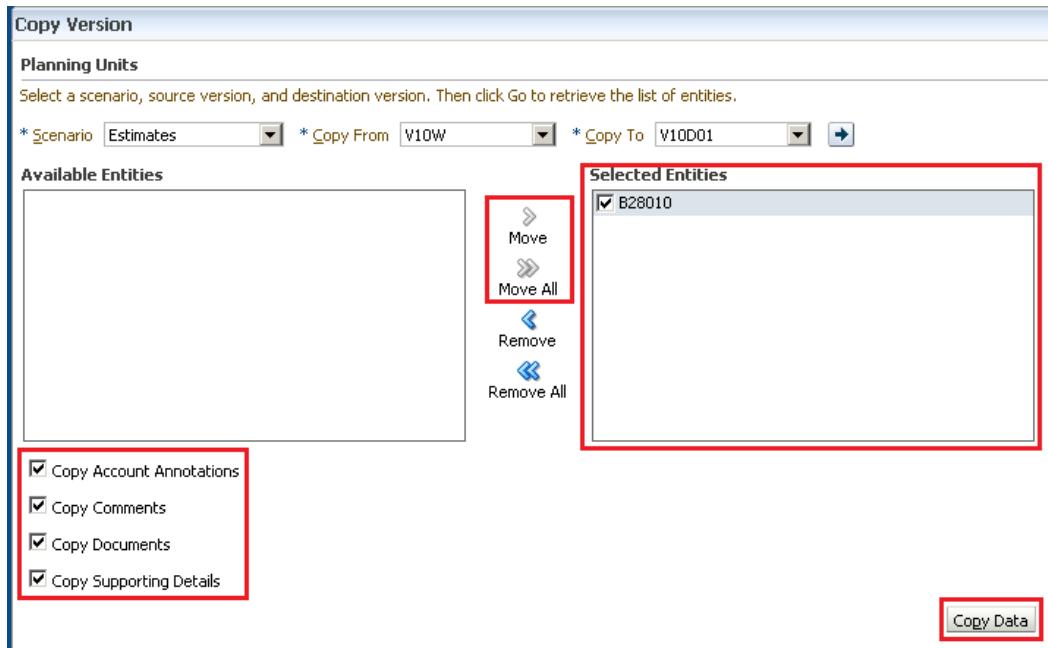
Selected Entities

[Move] [Move All] [Remove] [Remove All]

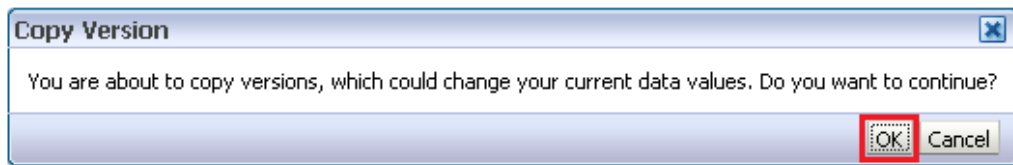
Copy Account Annotations
 Copy Comments
 Copy Documents
 Copy Supporting Details

[Copy Data]

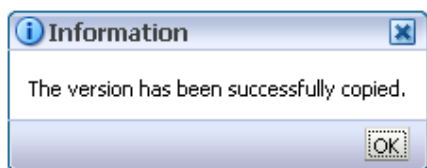
Select your school board and click the **Move** or **Move All** button to move the Entity into the **Selected Entities** box. Check off all of the options for copying additional information that has been attached to the version. Click the **Copy Data** button to run the copy process



A window will pop up to confirm that the user wants to run the copy process and override all data in the “Selected Entities” for the “Copy To” version



Once the process completes a window will pop up to inform the user that the copy was successful



7.1.1.1 Copy to FO Viewable

If a Board User wants the FO to preview data before submitting it, they have to copy a version into the FO Viewable Version. The reason for this is that the FO does not have access to any of the Board versions until they are set to active or FO Viewable. This would be done using the Copy Version process.

7.1.2 Version Description and Summary Dashboard in the task list

The Version Description and Summary – Submission Dashboard allows users to keep track of the versions they are working with. It is a place that allows the user to see the current status of their submission (whether it is active or not) and to add descriptions to each of the Draft versions available. This way the user can know where their data currently sits and can easily work on promoting the correct data as part of the Sign-off and Approvals process. The right hand panel shows the history of the versions that were activated over time.

The screenshot displays the 'Task List Status' dashboard. The left sidebar shows a 'Forms' menu with 'Version Description and Summary' selected. The main content area is divided into two sections:

- Active Flag:** A table with columns 'Submission Status' and 'Activation Date'. One row is highlighted with a red box:

Submission Status	Activation Date
Active / Actif	2014/03/26
- Version Description and Summary:** A table with columns 'Version Description' and 'Activation Date'. It is split into two panes, each with a red box around it.

Version Description	Activation Date
V10W:Board Working Version	Cindy's draft
V10D01:Board Draft 1	
V10D02:Board Draft 2	Enter Description
V10D03:Board Draft 3	
V10D04:Board Draft 4	
V10D05:Board Draft 5	
V10D06:Board Draft 6	
V10D07:Blank Template For Reset	
V10FOV:Board FO Viewable Version	

Version Description	Activation Date
V10ERO:Board Error Override Version	
V10:Board Active Version	2014/03/26
V10I01:Board Inactive Version 1	
V10I02:Board Inactive Version 2	
V10I03:Board Inactive Version 3	
V10I04:Board Inactive Version 4	
V10I05:Board Inactive Version 5	
V10I06:Board Inactive Version 6	
V10I07:Board Inactive Version 7	
V10I08:Board Inactive Version 8	
V10I09:Board Inactive Version 9	
V20:FO Active Version	
V10WDC:Board Working Version Snapshot Before Data Change	
V10WAC:Board Working Version Snapshot Before Attribute Change	

7.2 Approvals Process – Board Modifier

The Submission Management task list is used to manage sign-off and approvals as the cycle moves along. Board users would use the Input task lists to enter all necessary data and calculate the submission. Once the submission is ready for final validation and promotion, they would enter the Submission Management task list and run through a number of steps to promote the submission.

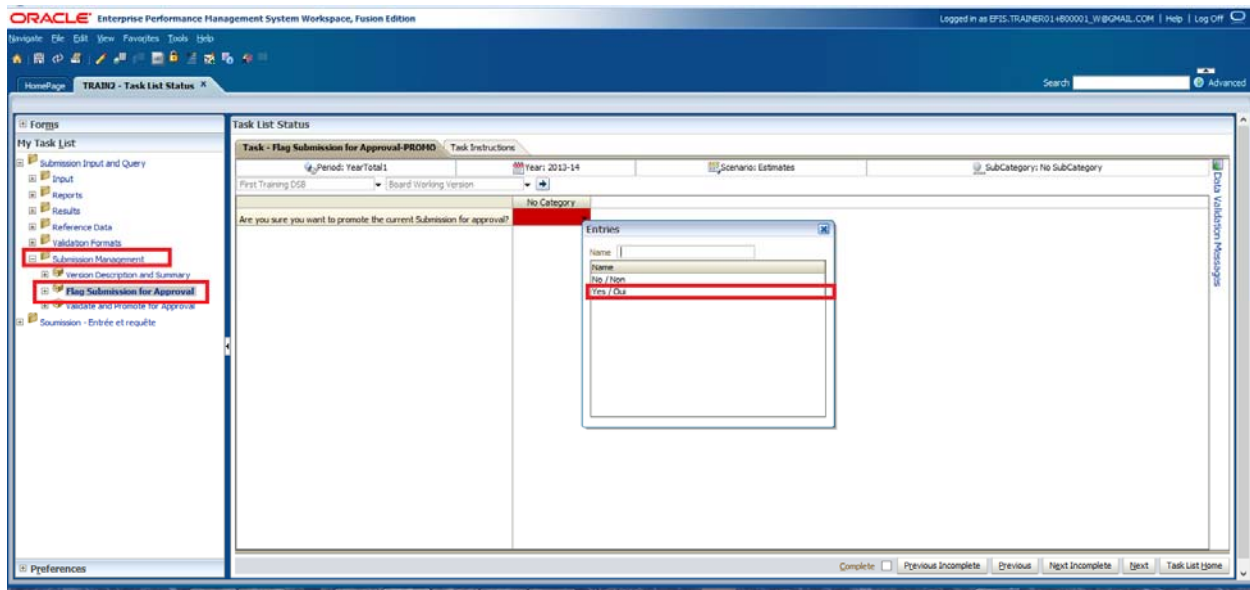
As mentioned before, the data which is ready to be validated or promoted must be stored in the Board Working Version (the Version Copy process outlines this in more detail).

It is recommended that the user first review and address any Errors and Warnings and Input Validation errors prior to beginning the Sign-off and Approvals process.

The validation and promotion functionality is done by running the following steps:

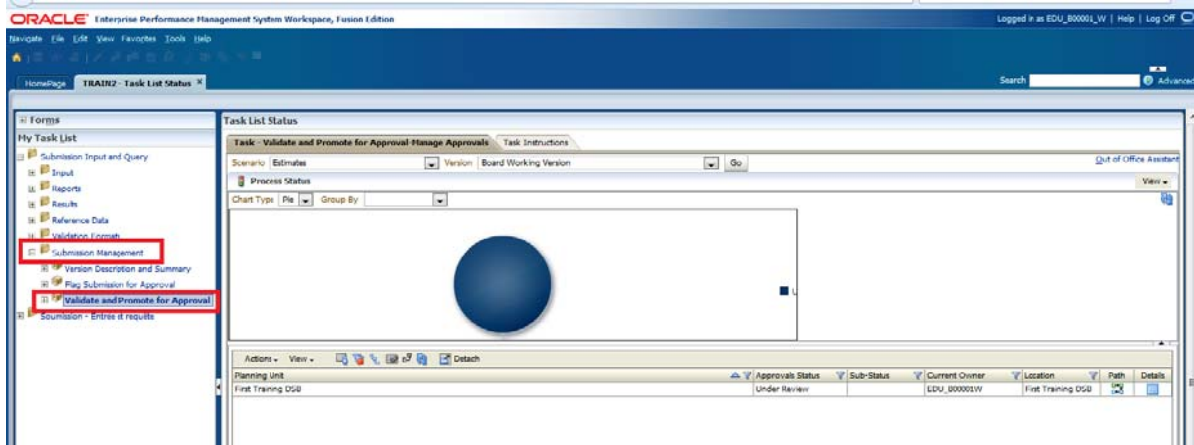
7.2.1 Flag Submission for Approval

Select **Submission Input and Query** → **Submission Management** → **Flag Submission for Approval** task. In the row “Are you sure you want to promote the current Submission for approval?” select **Yes** from the dropdown menu. Click the **Save** button. Each time a change is made to a submission, for example correction of invalid data or removal of an Error, the flag must be re-set. This is to ensure that the most recent data is being validated.

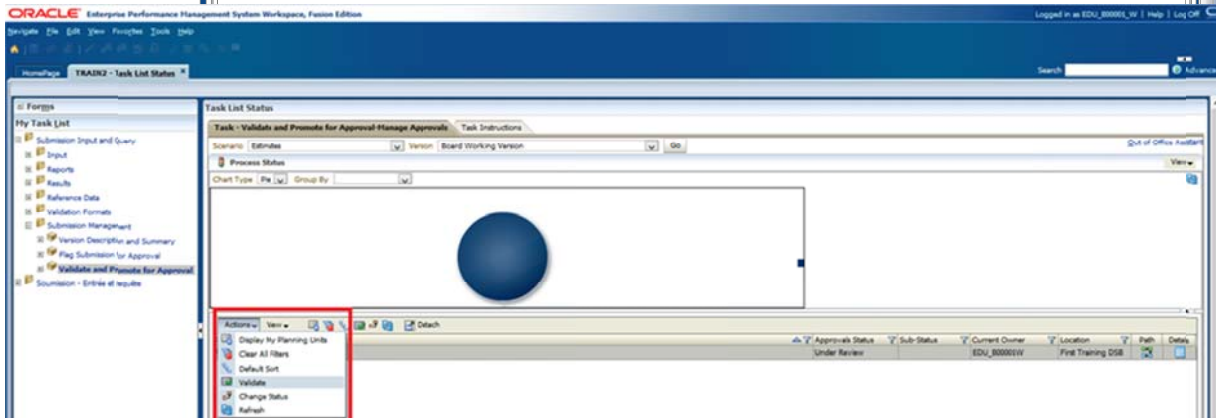
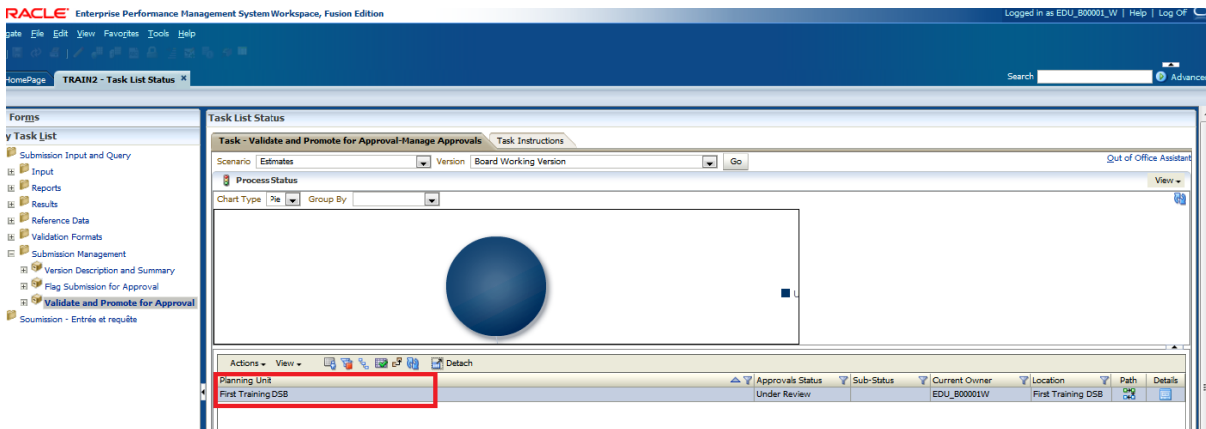


7.2.2 Validate Submission

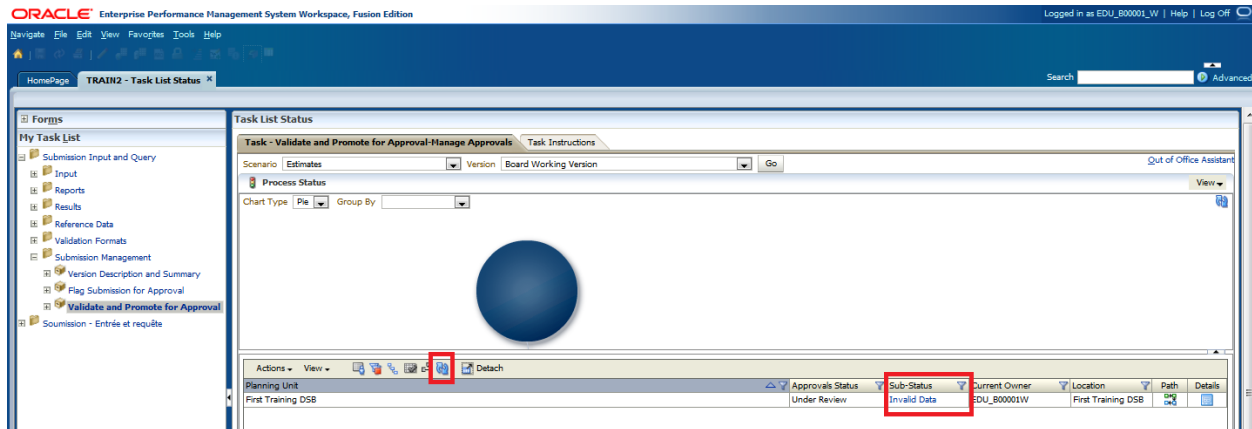
Select **Submission Input and Query** → **Submission Management** and open the **Validate and Promote for Approval** task



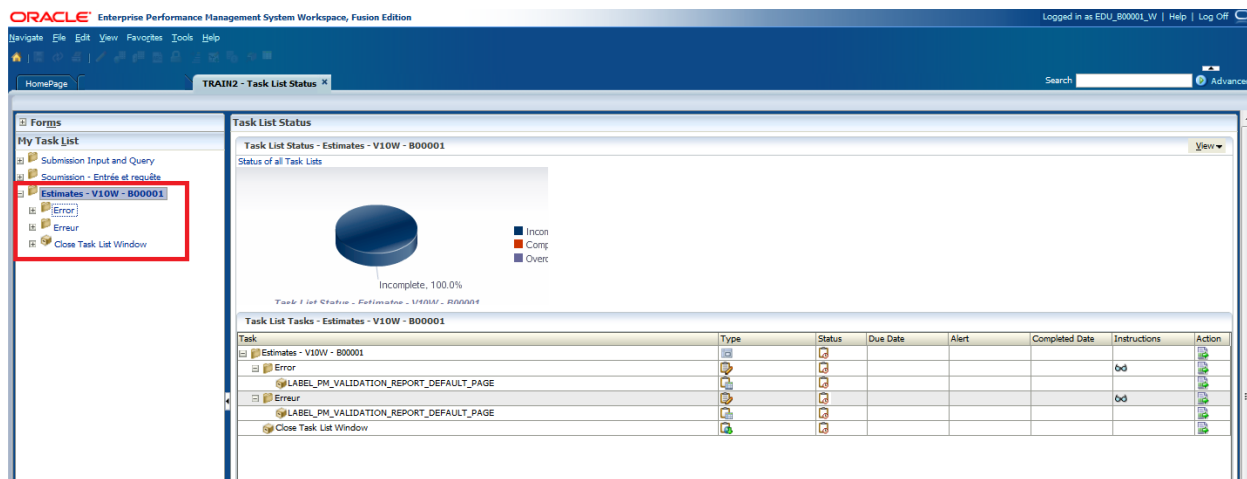
Select the your DSB shown under **Planning unit** and click on **Actions** → **Validate**



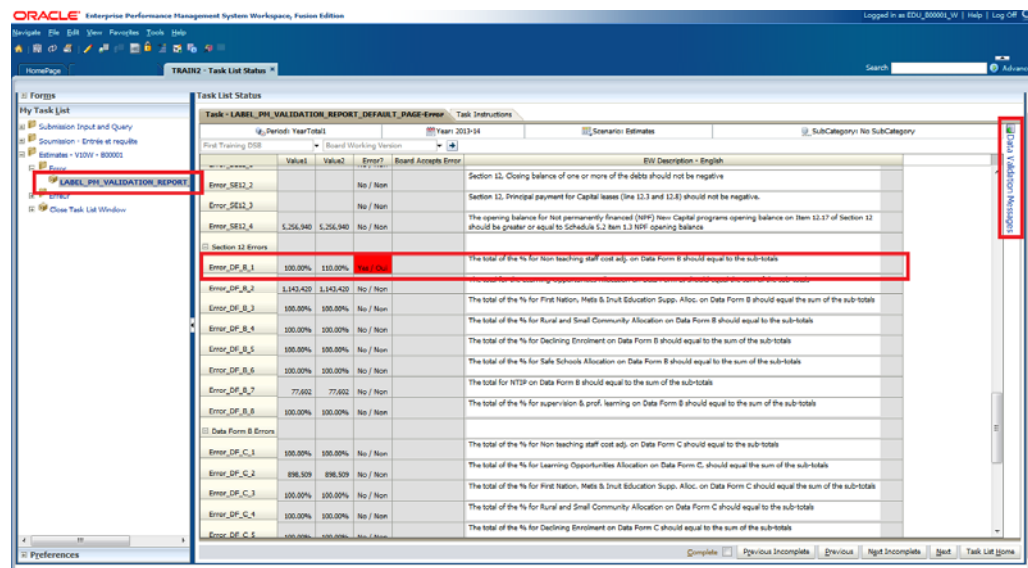
As the validation process takes a few moments you can click on the Refresh button to refresh the process and see the results. If there are any errors found during the Validation process, the Sub-Status will be displayed as **Invalid Data**. When there are no more validation errors the Sub-Status will display No Additional Approval Required.



Select the **Invalid Data Hyperlink** and a new Task List will appear under My Task List and will outline all the forms that contain validation errors in them



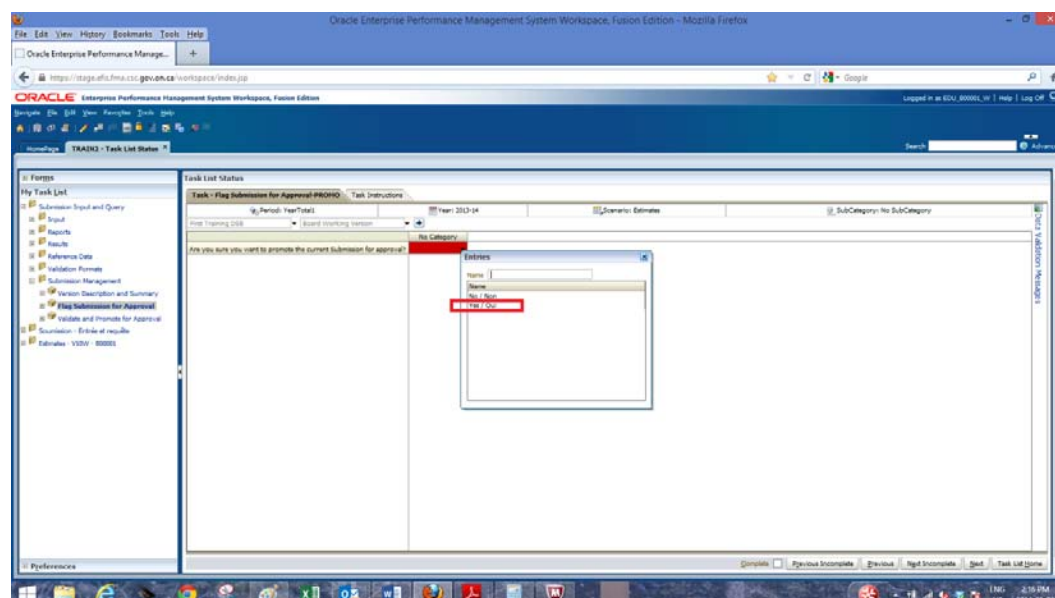
Selecting the error task in the Task list will take the user to the error that needs to be corrected. In the example below, the user is directed to an Error Form indicating there is an error on Data Form B. The user will navigate to Data Form B to remove the error.



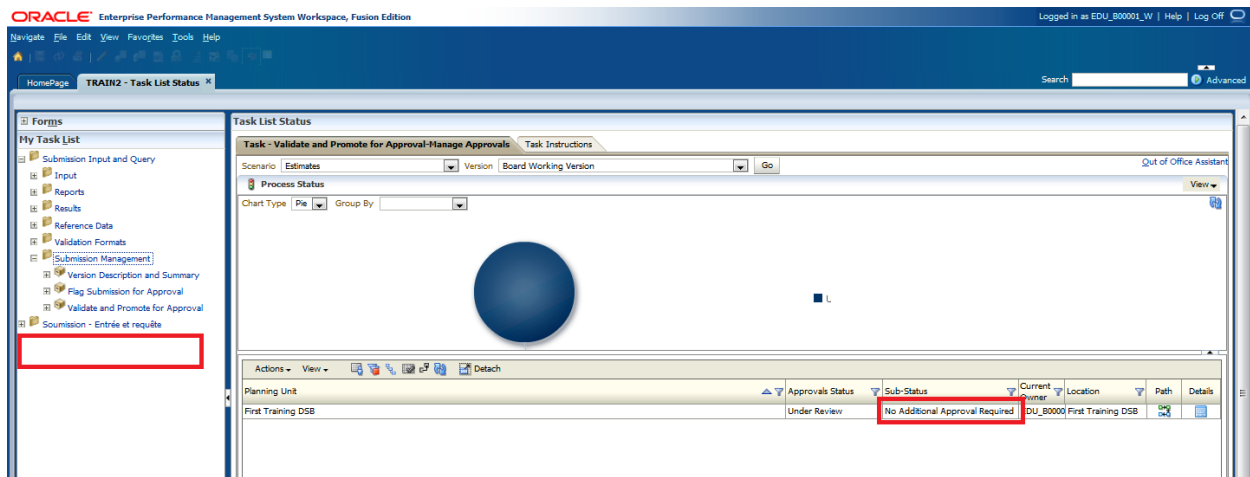
The user must locate and correct all validation errors before the Submission can be successfully promoted.

Once the validation errors have been corrected, the user can either rerun the **Validation** process. to ensure they have not missed any errors or move directly to the Promote process.

NOTE: To rerun the Validation the user must re-set the **Flag Submission for Approval** to **Yes**.

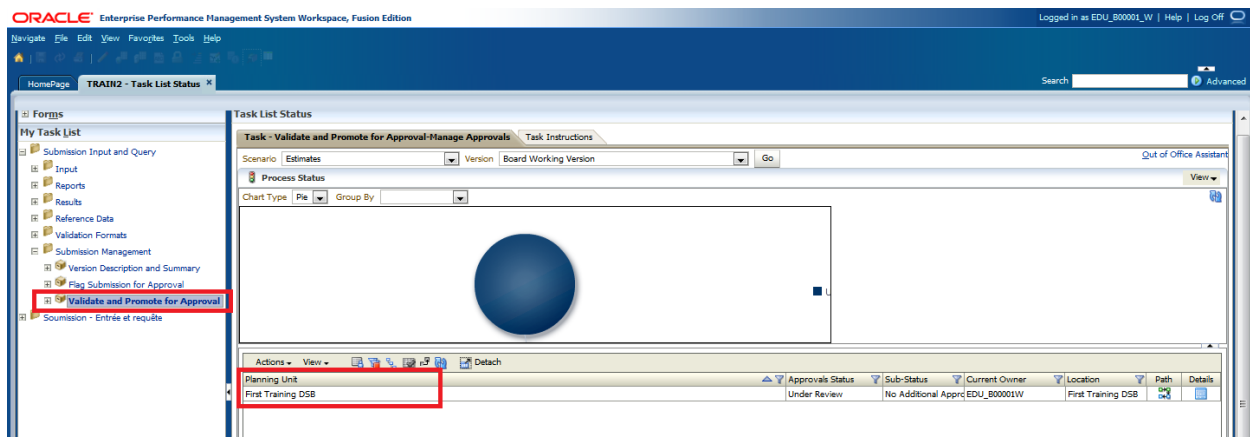


When the Submission passes the validation, the sub status will be updated to **No Additional Approval Required** and the **Error Task List** will be removed. The submission is now ready to be **Promoted**.

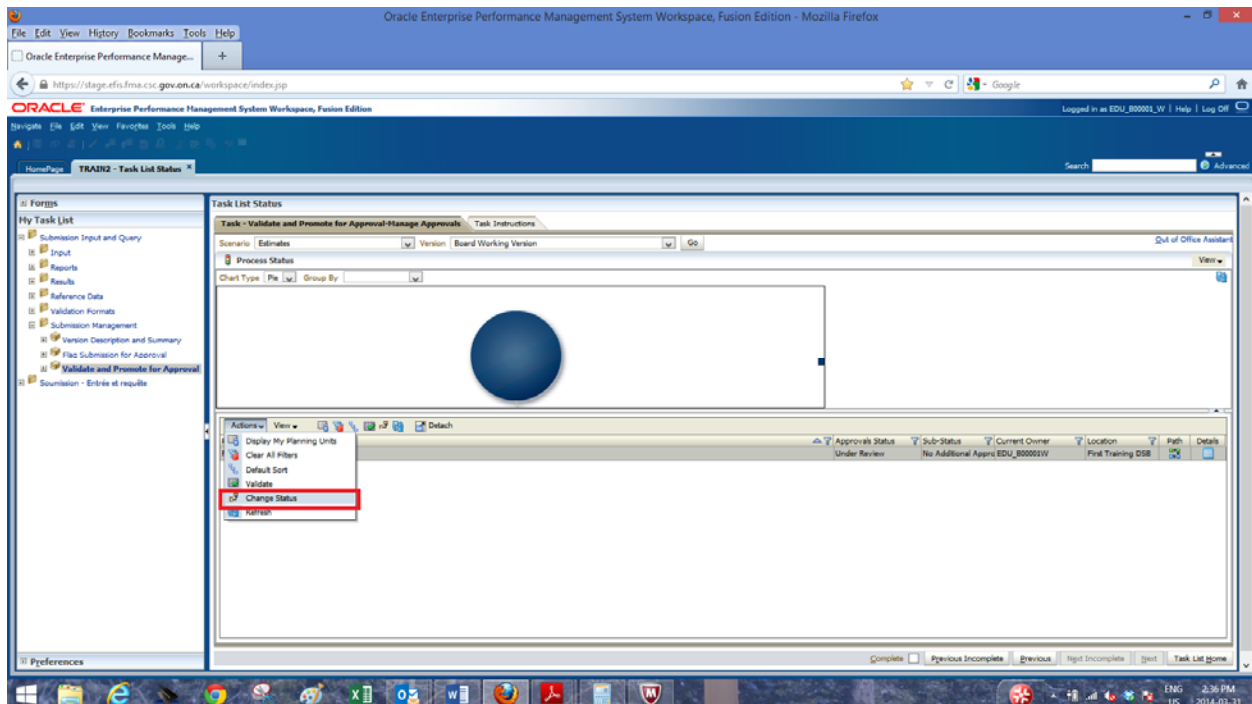


7.2.3 Promote Submission

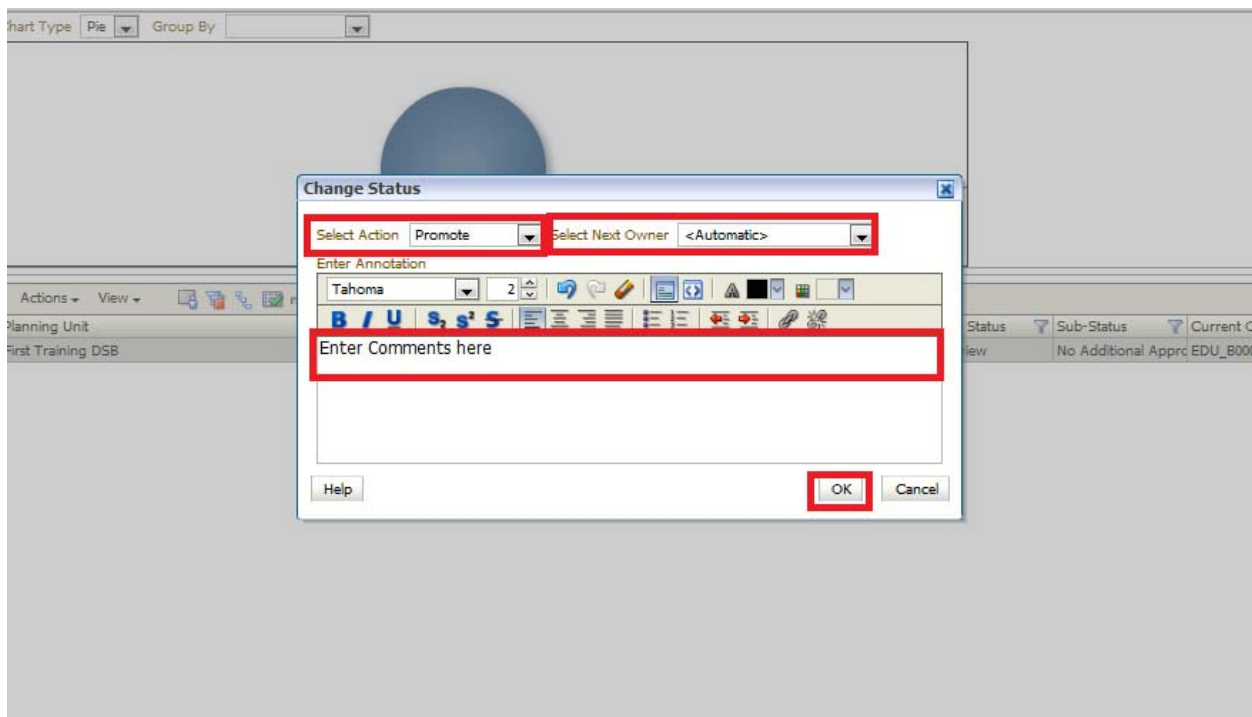
To Promote the submission to the Board Approver select **Submission Input and Query** → **Submission Management** → **Validate and Promote for Approval** and select your DSB under the Planning Unit.



Once the DSB under planning Unit is selected select **Actions** → **Change Status**.



The Change Status screen will appear. Select **Promote** from the **Select Action** list and the **Select Next Owner** will be populated with **Automatic**. Enter comments if required, then select **OK**



7.3 Manage Approvals – Board Approver

Once a submission has been promoted by the Board Modifier, the Board Modifier no longer has write access to the Working Version and the next user in line is the Approver. The Approver is responsible for reviewing the submission and deciding how to proceed with it. The Approver has two choices: running the sign-off process on the submission or rejecting the submission. If the Approver decides to reject the submission, the submission is back in the hands of the Board Modifier.

Once approved, the data is automatically copied from the Board Working Version to the Board Active Version as well as the FO Working Version. At this point the status of the submission is set to “Active” and the FO is responsible for continuing the process.

7.3.1 Approve and Sign-off

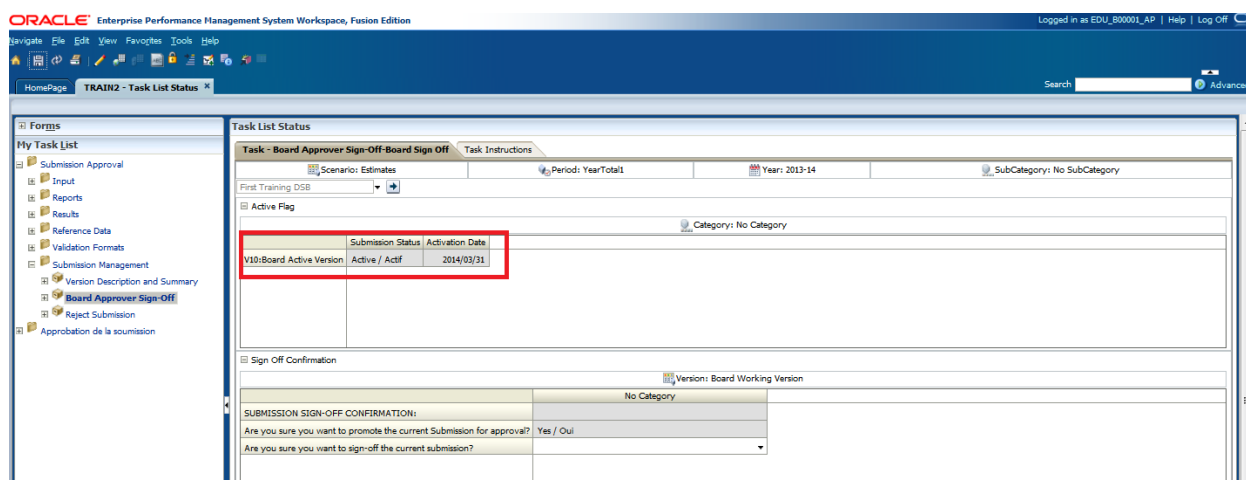
Select **Submission Approval** → **Submission Management** → **Board Approver Sign-Off**. Within the form click the dropdown beside “Are you sure you want to sign-off the current submission?” and select **Yes** then select **Save**.

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The user is logged in as EDU_800001_AP. The interface displays the 'Task List Status' for a submission. The left-hand navigation pane shows the 'Forms' section, with 'Board Approver Sign-Off' highlighted. The main content area shows the 'Task - Board Approver Sign-Off - Board Sign Off' form. The form includes a 'Task List Status' section with a table for 'Active Flag' and a 'Sign Off Confirmation' section. The 'Sign Off Confirmation' section contains the following text:

SUBMISSION SIGN-OFF CONFIRMATION:
 Are you sure you want to promote the current Submission for approval? Yes / Oui
 Are you sure you want to sign-off the current submission? Yes / Oui

A dropdown menu is open, showing the following options: Name, No / Non, and Yes / Oui (selected). The form also includes a 'Task List Home' button at the bottom right.

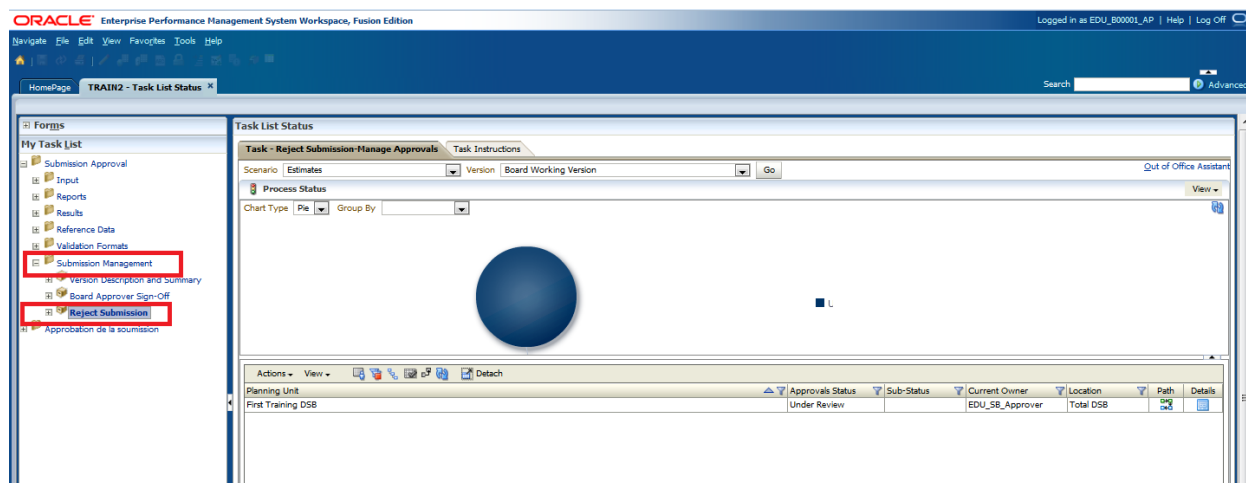
The status of the Submission will be changed to Active and the Activation date will be updated.



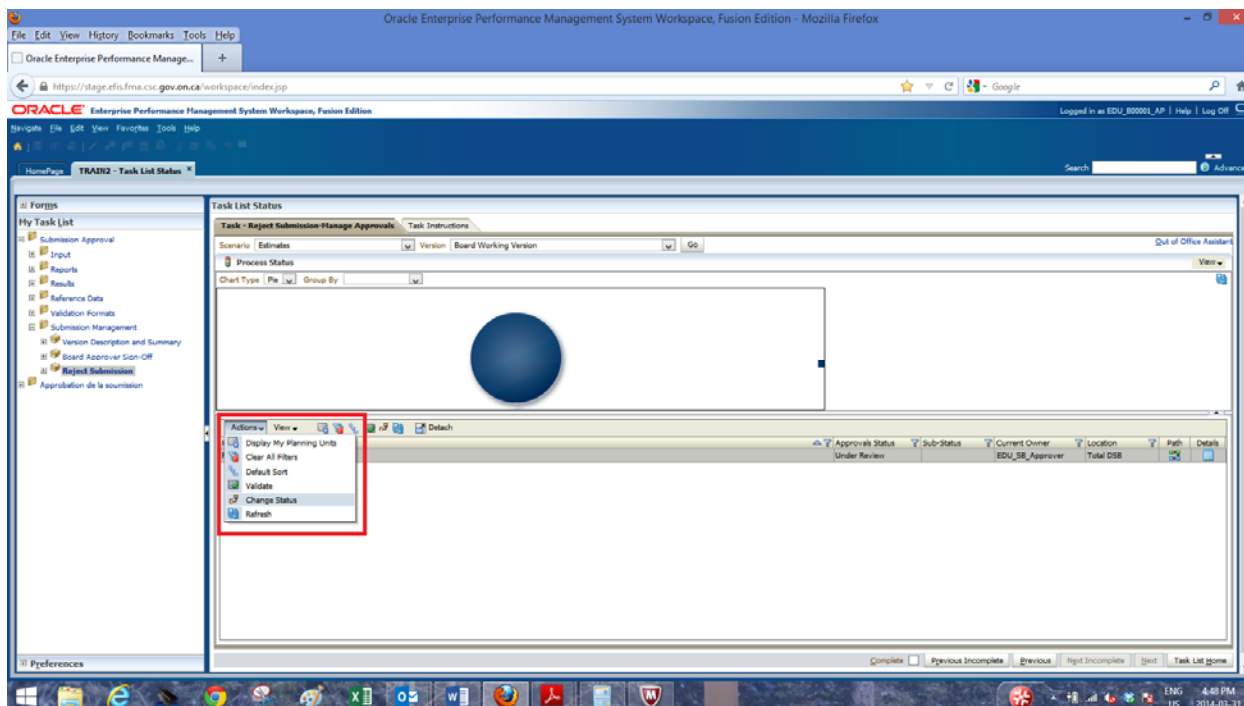
7.3.2 Reject and return submission to the Board Modifier

If the approver decides that the submission is not satisfactory and not ready for further sign-off, the approver can return the submission to the original owner (Board Modifier).

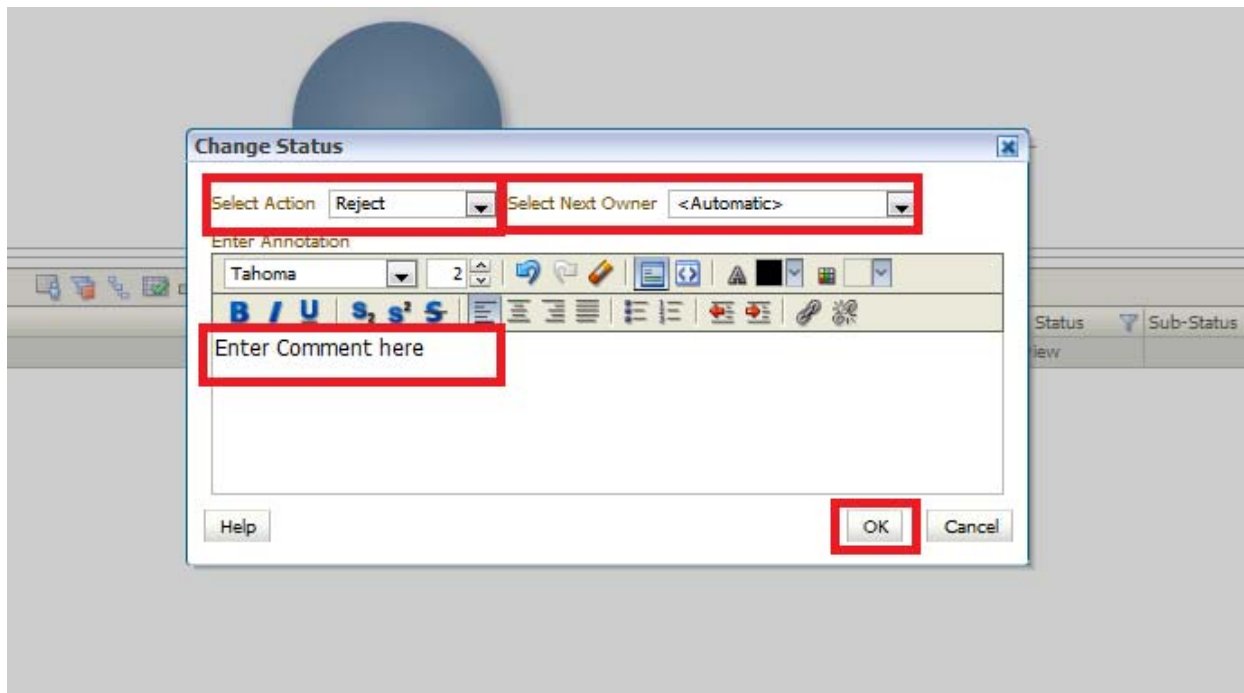
To reject a submission select **Submission Approval** → **Submission Management** → **Reject Submission**



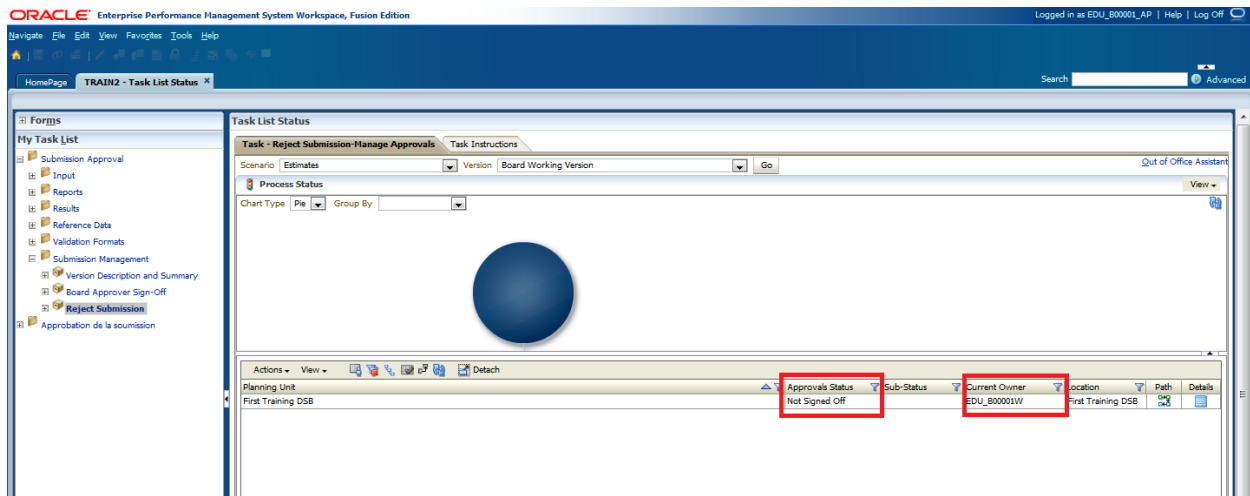
Once the DSB under planning Unit is selected select **Actions** → **Change Status**.



The Change Status screen will appear, select **Reject** from the **Select Action** list, **Select Next Owner** will be populated with **Automatic** and enter comments if required, then select **OK**



The Approvals status will change to **Not Signed off**. The Owner will revert back to the Board Modifier and Board Working version of the submission is no longer read only and changes can be made.



7.3.3 Submission with Error Override

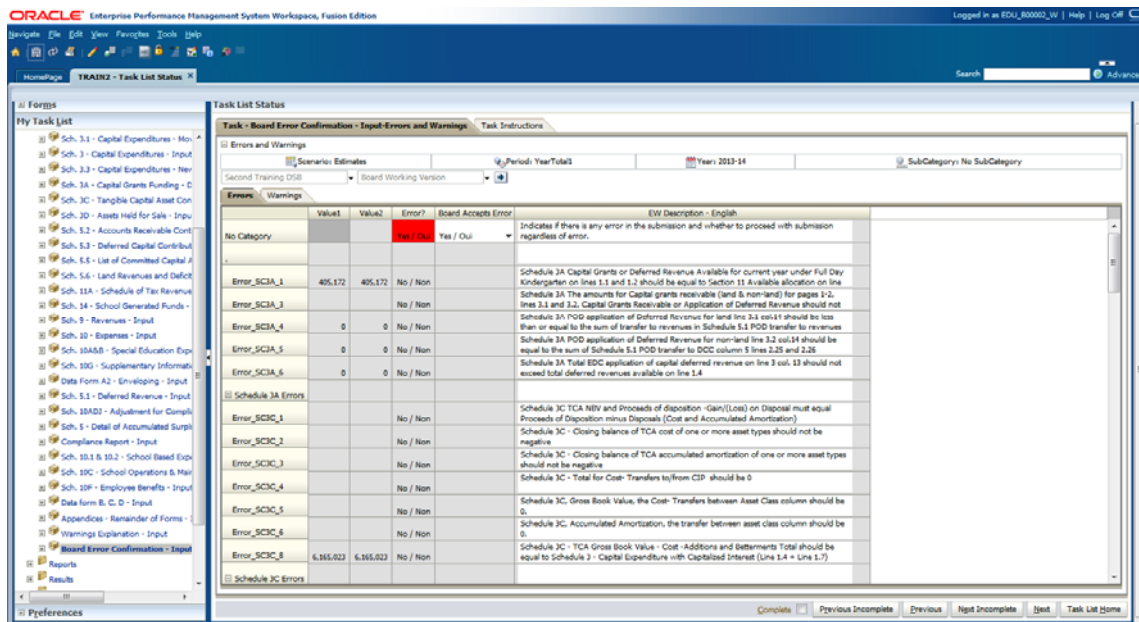
Under special circumstances a Board may need to promote a Submission that contains errors. In these rare instances, the Board Modifier will set the Board Accepts Error Flag to **Yes** then follow the normal submission process. In this case the data is automatically copied from the Board Working Version into the Board Error Override Version. From the perspective of the Approver the process follows the exact same steps as outlined in the previous section for a submission containing no errors. After the sign-off by Approver, the data still sits in the School Board Error Override Version. At this point, additional steps will be required by Ministry personnel. The Ministry needs to confirm activation of submission with errors. Upon successful completion of this step, the data is copied from Board Error Override into Board Active Version and FO Working Version. Please note that once you have promoted the version with errors you need to contact the Ministry in order for them to perform the additional steps required.

Select **Submission Input and Query** → **Input** → **Board Error Confirmation – Input** select **Yes** from the **Board Accepts Error** drop down list and select **Save**

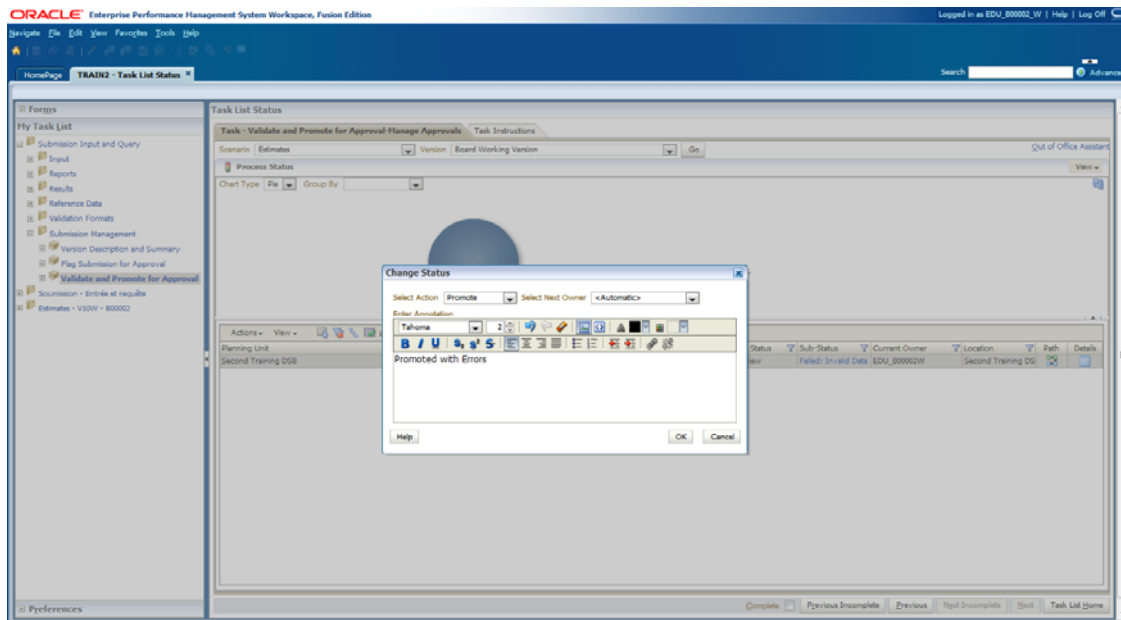
The screenshot displays the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The main window is titled 'Task List Status' and shows a task named 'Board Error Confirmation - Input: Errors and Warnings'. The task is currently in the 'Input' phase. The interface includes a table with columns for 'No Category', 'Value1', 'Value2', 'Error?', and 'Board Accepts Error'. A dropdown menu for 'Board Accepts Error' is open, showing 'Yes / Out' selected. The 'Board Error Confirmation - Input' task is highlighted in the left-hand navigation pane.

No Category	Value1	Value2	Error?	Board Accepts Error	W Description - English
Error_SC3A_1	405,172	405,172	No / Non	Yes / Out	
Error_SC3A_3			No / Non		
Error_SC3A_4	0	0	No / Non		
Error_SC3A_5	0	0	No / Non		
Error_SC3A_6	0	0	No / Non		
Schedule 3A Errors					
Error_SC3C_1			No / Non		
Error_SC3C_2			No / Non		Schedule 3C - Closing balance of TCA cost
Error_SC3C_3			No / Non		Schedule 3C - Closing balance of TCA
Error_SC3C_4			No / Non		Schedule 3C - Total for Cost Transfers
Error_SC3C_5			No / Non		Schedule 3C, Gross Book Value, the Cost-Schedule 3C, Accumulated
Error_SC3C_6			No / Non		Schedule 3C - TCA Gross Book Value
Error_SC3C_8	6,165,023	6,165,023	No / Non		
Schedule 3C Errors					

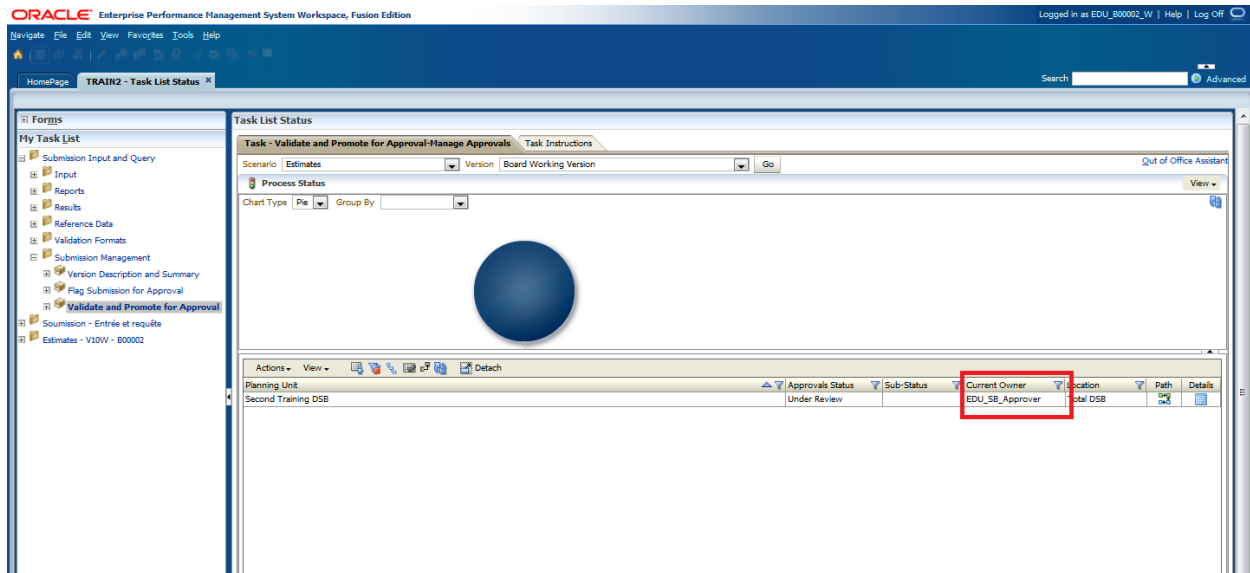
The **Board Accepts Error** flag is set to **Yes**



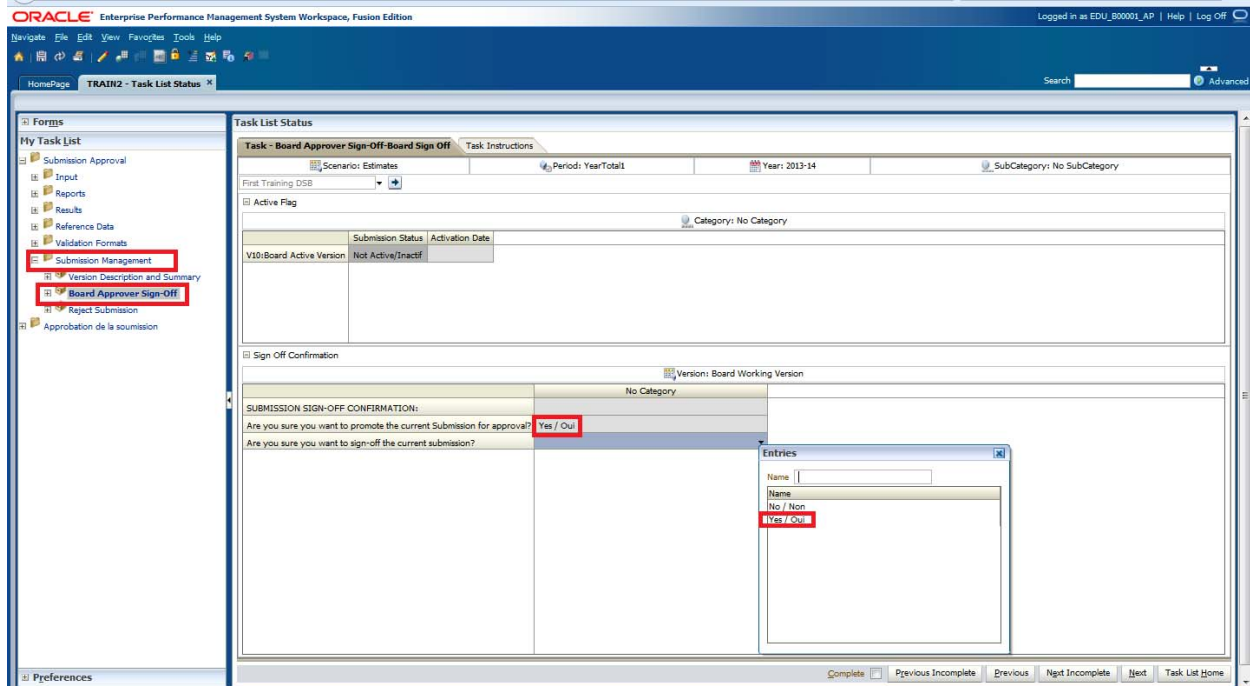
Board Modifier follows the normal Promotion process.



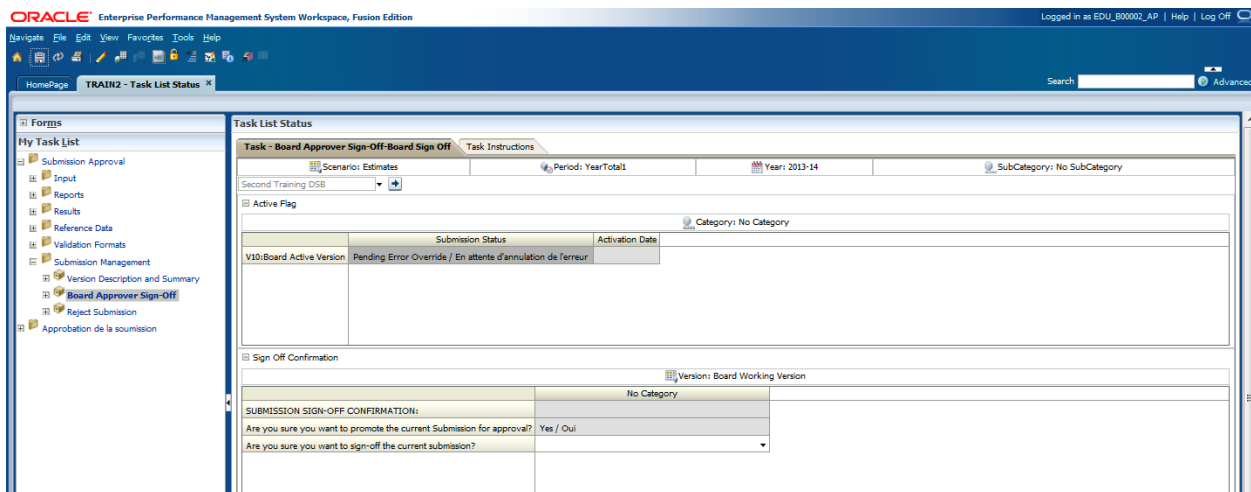
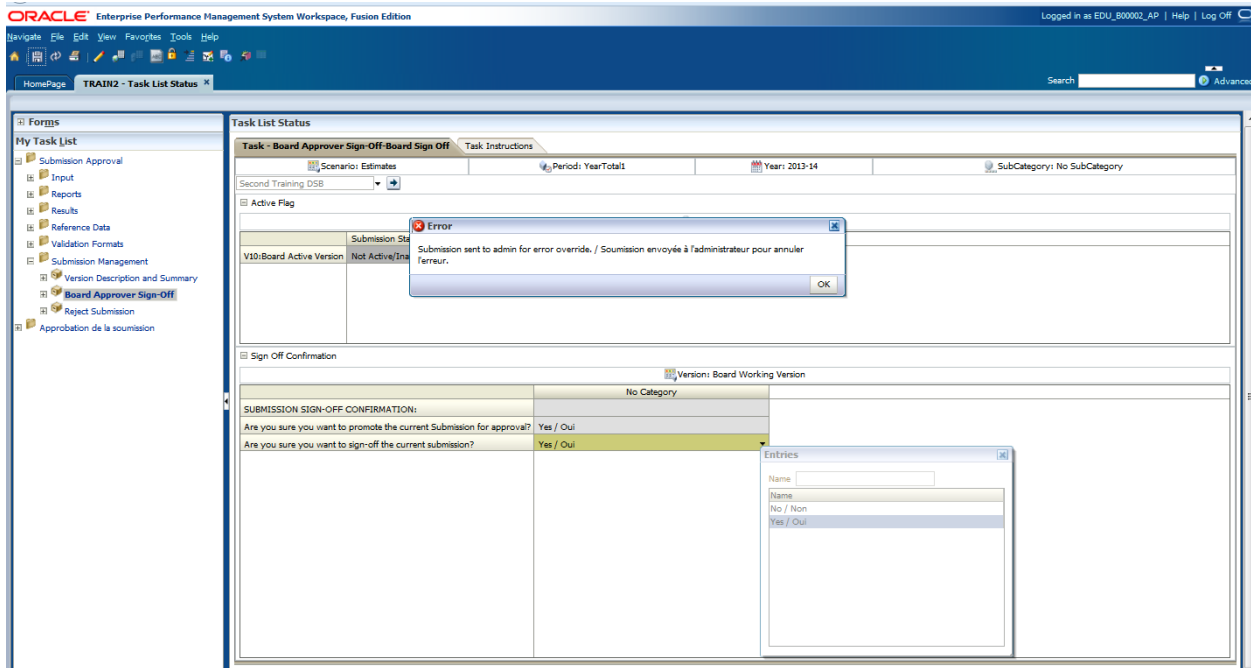
The submission owner is now the Board Approver and the Board Working version is changed to read only



Board Approver follows the normal sign-off process



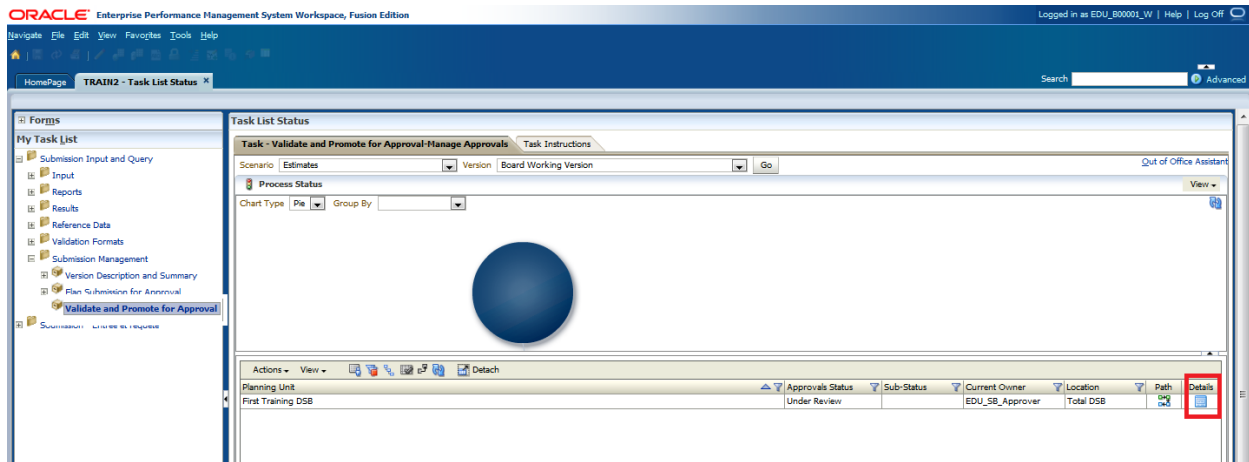
The Board Approver will receive the message that the Submission has been sent to the Administrator (Ministry) for error override and the submission status will become Pending Error Override.



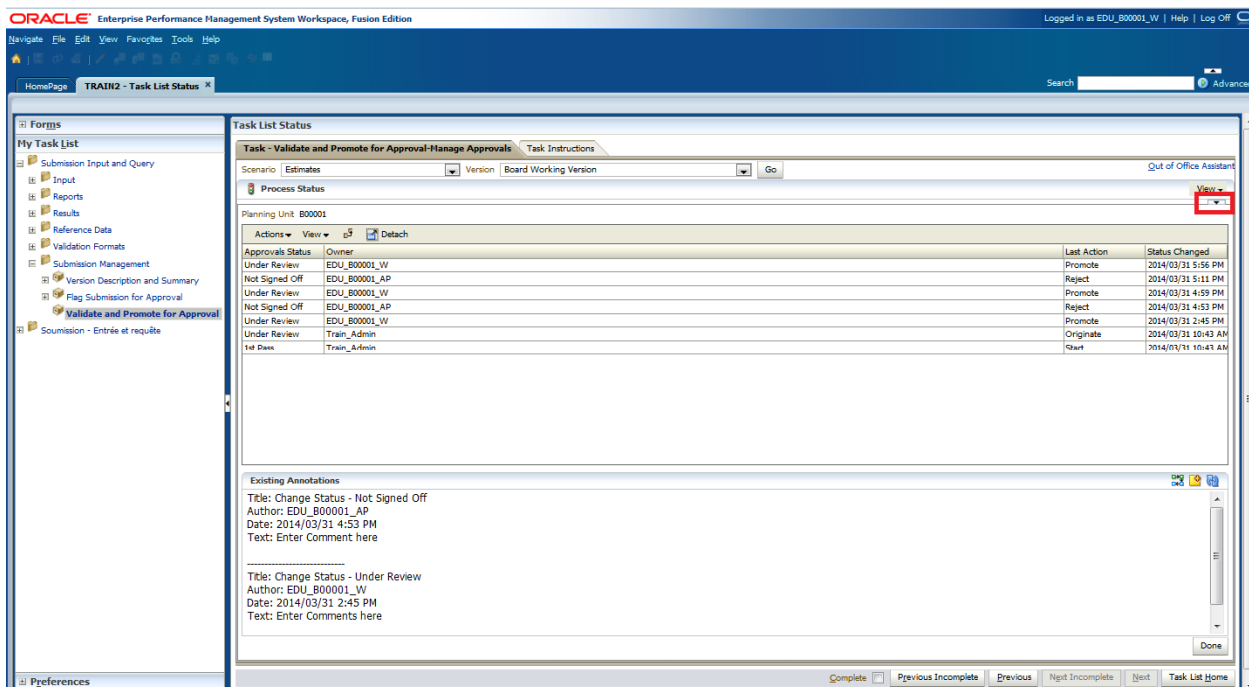
Board must contact the Ministry to initiate the over-ride approval.

7.3.4 Checking the Submission History

Users will be able to view the submission’s history as well as any annotations the Board Approver has made by selecting **Validate and Promote for Approval** and clicking the **Details** button.



Status history and comments will be displayed, to view status changes collapse the pie chart by selecting the arrow in the right corner



8 Facility Data Management

8.1 Process Overview

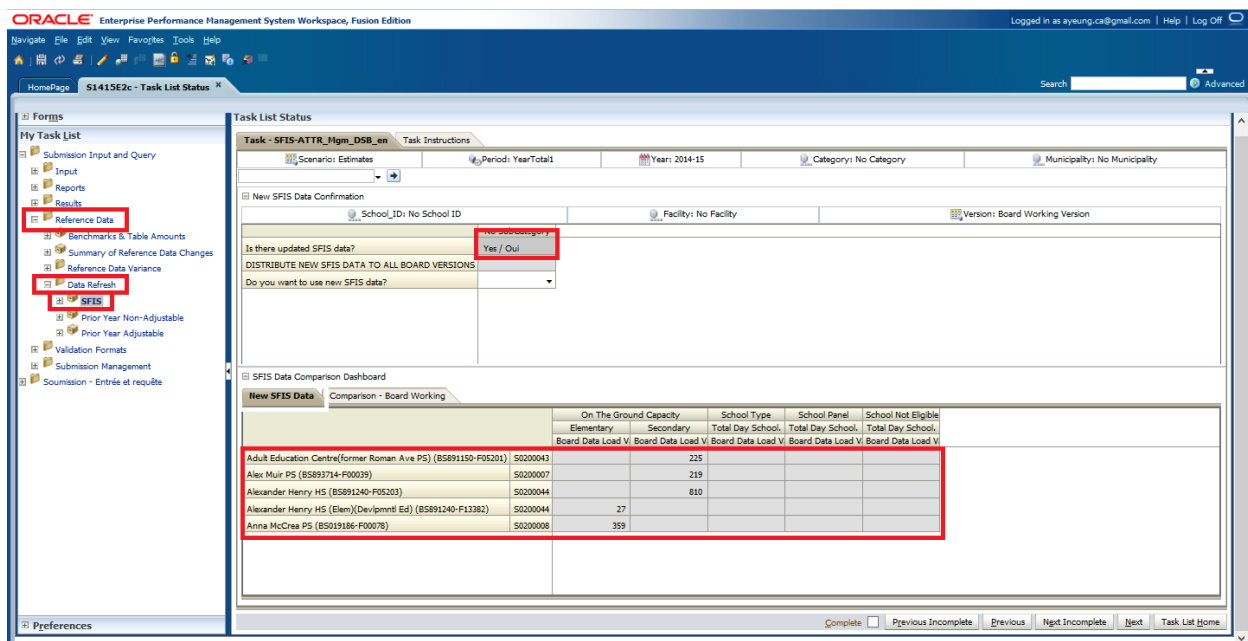
Facility data is loaded from SFIS at the start of the submission cycle to the Board Working and all Board Draft versions. During the cycle an hourly process is run to compare the facility data in SFIS to the facility data in EFIS 2.0. If differences are found in the facility data during the comparison process, the new facility data is loaded into the **SFIS Data Management** forms in EFIS 2.0 to allow the boards the ability to review and updated the data if required.

When a change is required to **OTG, School Type, Panel** or **School Not Eligible** for Top Up flag, the changes will be first made in SFIS then the comparison process with update the SFIS Data Management form.

8.2 SFIS Data Management Form

Select **Reference Data** → **Data Refresh** → **SFIS** from the task list to open the **SFIS Data Management** form.

When new data has been loaded the **Is there updated SFIS data?** Flag will be set to **Yes** and the New SFIS Data tab will be populated with the data changes. **Note:** only data values that have changed will be displayed.



The screenshot displays the Oracle Enterprise Performance Management System Workspace. The main window shows the 'Task List Status' for 'Task - SFIS-ATTR_Mgm_DSB_en'. The 'New SFIS Data Confirmation' section contains the following information:

- Scenario: Estimates
- Period: YearTotal1
- Year: 2014-15
- Category: No Category
- Municipality: No Municipality
- Version: Board Working Version

The 'New SFIS Data' section contains a table with the following data:

	School ID	On The Ground Capacity		School Type	School Panel	School Not Eligible
		Elementary	Secondary	Total Day School	Total Day School	Total Day School
Adult Education Centre(former Roman Ave PS) (BS891150-F05201)	S0200043		225			
Alex Muir PS (BS893714-F00039)	S0200007		219			
Alexander Henry HS (BS891240-F05203)	S0200044		810			
Alexander Henry HS (Elem)(Devlpmtl Ed) (BS891240-F13382)	S0200044	27				
Anna McCrea PS (BS019186-F00078)	S0200008	359				

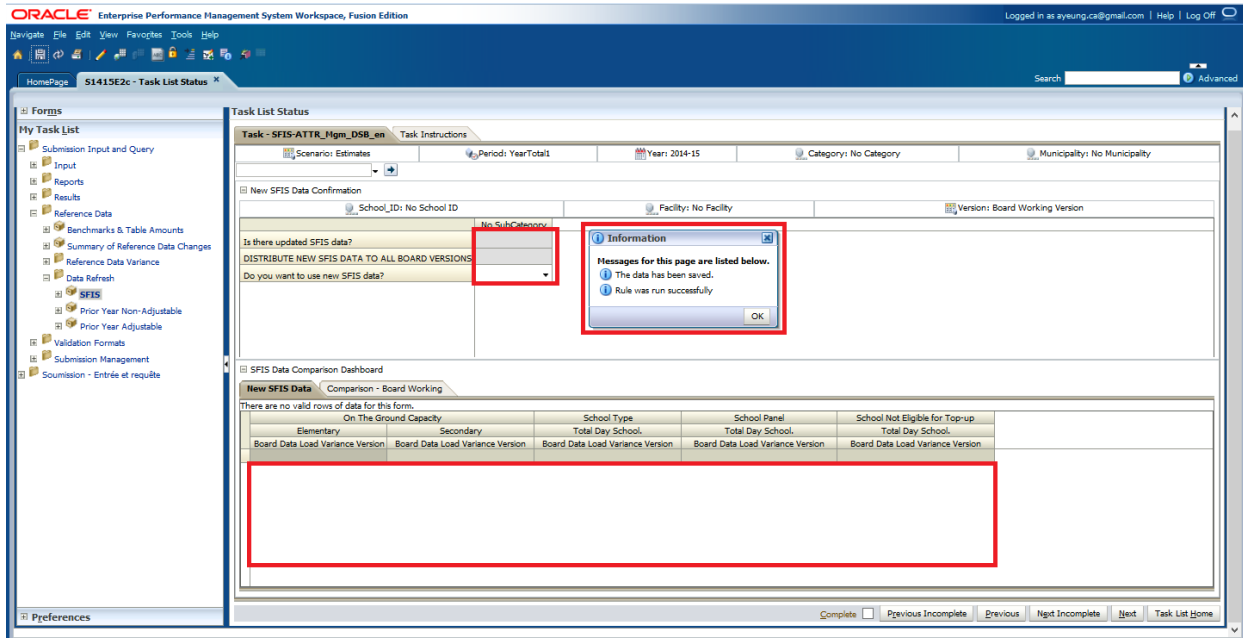
To review the facility data that has changes select the **Comparison Board Working** tab. All current values are displayed in the **Board Working** column and all values that have changed will be displayed in the **Board Data Load Variance Version** column and be highlighted in Purple.

The screenshot shows the Oracle Enterprise Performance Management System Workspace. The main window displays the 'Task List Status' for 'Task - SFIS-ATTR_Mgm_DSB_en'. The 'Comparison - Board Working' tab is active. A table titled 'New SFIS Data' is shown, with columns for 'Board Working Version', 'Board Data Load Variance Version', and 'Board Working Version'. The 'Board Data Load Variance Version' column contains purple-highlighted values: 223, 218, 801, 24, 352, 127, 161, and 110. A dropdown menu for 'Do you want to use new SFIS data?' is open, showing 'Yes / Oui' selected.

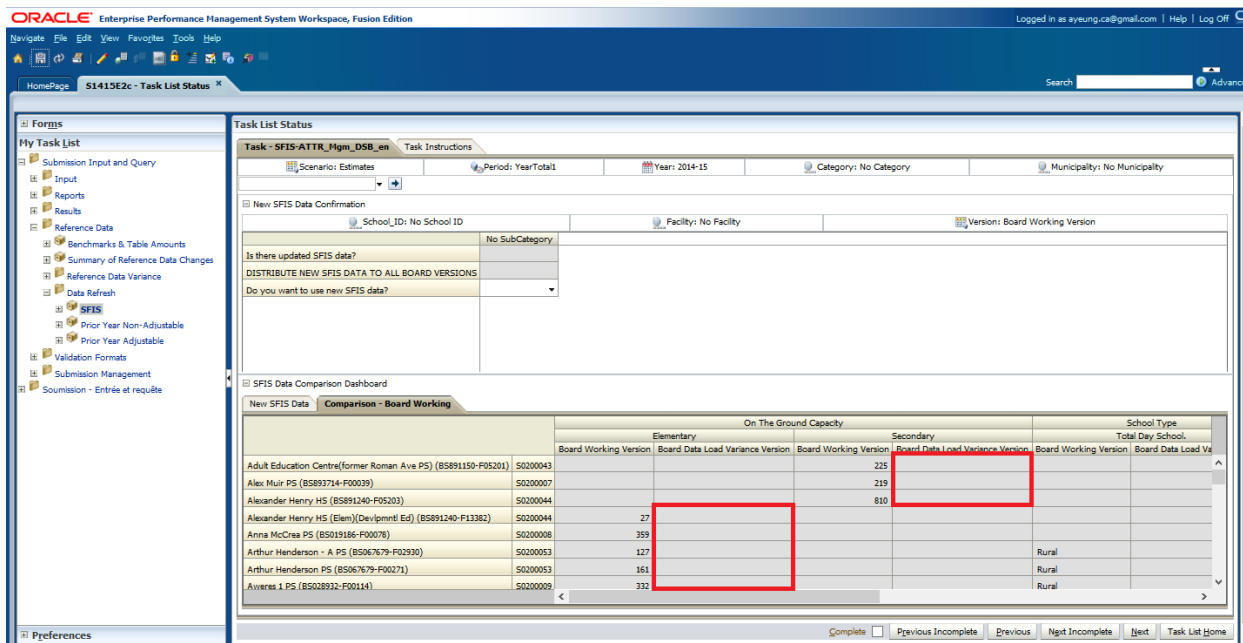
The Board can choose to either use the new SFIS data in there submission or continue to work with the existing data. To update the new SFIS to the Board Versions select **Yes** from the **Do you want to use new SFIS data?** dropdown list, and select **Save**

The screenshot shows the Oracle Enterprise Performance Management System Workspace. The main window displays the 'Task List Status' for 'Task - SFIS-ATTR_Mgm_DSB_en'. The 'Comparison - Board Working' tab is active. A dialog box titled 'Entries' is open, showing a list of entries with 'Yes / Oui' selected.

The data has been saved message will be displayed, the **New SFIS Data Confirmation** flags will be set to **Blank**, and the **New SFIS Data Tab** will become empty of data, select **OK**. The Board Working and all Draft Versions will be recalculated using the new facility data.



On the Comparison – Board Working Tab the **Board Working Version** column will be updated with the new data and the **Board Data Load Variance** column will be Blank.



If the user selects **No** from the dropdown the data will NOT be updated to Board Versions and the following message will be displayed.

The screenshot shows the Oracle Enterprise Performance Management System Workspace. The main window displays the 'Task List Status' for 'Task - SFIS-ATTR_Mgm_DSB_en'. A dropdown menu for 'Do you want to use new SFIS data?' is open, with 'No / Non' selected. An error dialog box is displayed over the table, with the text: 'Error: Please confirm that you want to use the new School Attribute data. / Veuillez confirmer que vous désirez utiliser les nouvelles données d'attribut de l'école.' Below the error message is a table titled 'New SFIS Data Comparison - Board Working'.

	Board Working Version	On The Ground Capacity		Board Working Version	Board Data Load Variance Version	Board Working Version	Board Data Load Variance Version	School Type	
		Elementary	Secondary					Total Day School	Board Data Load Va
Adult Education Centre(former Roman Ave PS) (B5891150-F05201)	50200043		223		225				
Alex Muir PS (B5893714-F00039)	50200007		218		219				
Alexander Henry HS (B5891240-F05203)	50200044		801		810				
Alexander Henry HS (Elem)(Developmentl Ed) (B5891240-F13382)	24	27							
Anna McCrea PS (B5019186-F00078)	352	359							
Arthur Henderson - A PS (B5067679-F02930)	127							Rural	
Arthur Henderson PS (B5067679-F00271)	161							Rural	
Averex 1 PS (B5028937-F00114)	170							Rural	

9 Prior Year Data Management

9.1 Prior Year Data Overview

Prior Year data is loaded at the start of each cycle. During a submission cycle data can be changed in a prior year's submission that may impact the current submission. During the cycle a daily process is run to compare the data from Prior Submissions to the Prior Year data that was loaded into the Current Submission. If differences are found in the data during the comparison process, the updated data is loaded into the **Prior Year Data Management** forms in EFIS 2.0 to allow the boards the ability to review and updated the data if required.

9.2 Adjustable Prior Year Data

Prior year data that is available to be adjusted by the user is loaded into Blue Cells. To assist the user in managing the data the original values are also loaded into the **Adjustable Prior Year Data** Form. This form contains 2 tabs one for Board level amounts and one for School level enrolment.

If Prior year data has changed during the cycle the value in the **Landing Version** column will be highlighted in purple. The user can choose to update the value by entering the amount in the Board Working Version column. Any amounts updated in the Board Working Version column will also be updated in the corresponding schedule \ section. This form can also be used to update any or all Prior Year data and serves as a reference back to the originally loaded or updated values. Data that has changed at any point during the cycle will remain highlighted in purple.

The section below describes the update process.



Educational Development Charges – Balance at September 1 is loaded from Prior Year submission into Schedule 5.1

Task - Sch. 5.1 - Deferred Revenue - Input Opening, Contributions and Earnings-SC05.1_Input

Description	Deferred Revenue - Balance at September 1	Deferred Revenue - Contributions Received	Deferred Revenue - Adjustment	Deferred Revenue - Earnings on Deferred Revenue	Deferred Revenue
OTHER PROVINCIAL GRANTS					
Other Provincial Grant - Capital 1					
Other Provincial Grant - Capital 2					
Other Provincial Grant - Capital 3					
Other Provincial Grant - Capital 4					
Other Provincial Grant - Capital 5					
Other Provincial Grants - Capital					
THIRD PARTY					
Proceeds of Dispositions - School Buildings					
Proceeds of Disposition - Other					
Assets Held for Sale					
Education Development Charges					0
Federal Government - Capital					
School Generated Funds - Capital					
Board Level Donations - Capital					
Other Third Party Grants - Capital 1					

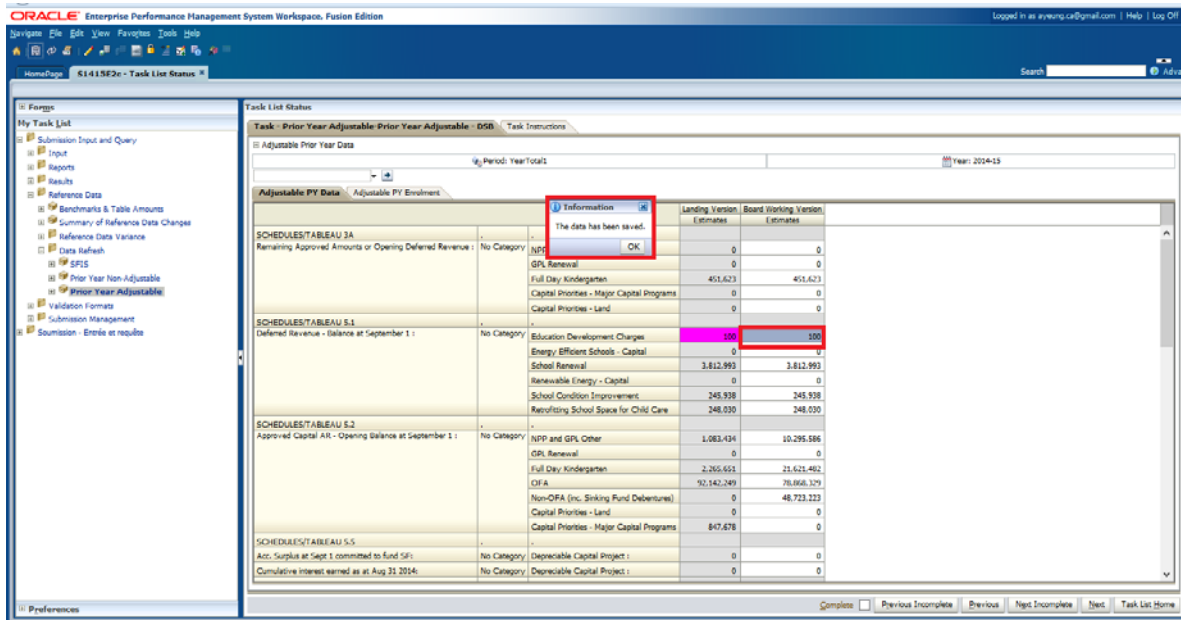
A change is made to the Closing Balance of the Educational Development Charges in the Prior Year's Submission. The data is updated to the **Landing Version** column and highlighted in Purple.

Select → **Reference Data** → **Data Refresh** → **Prior Year Adjustments**

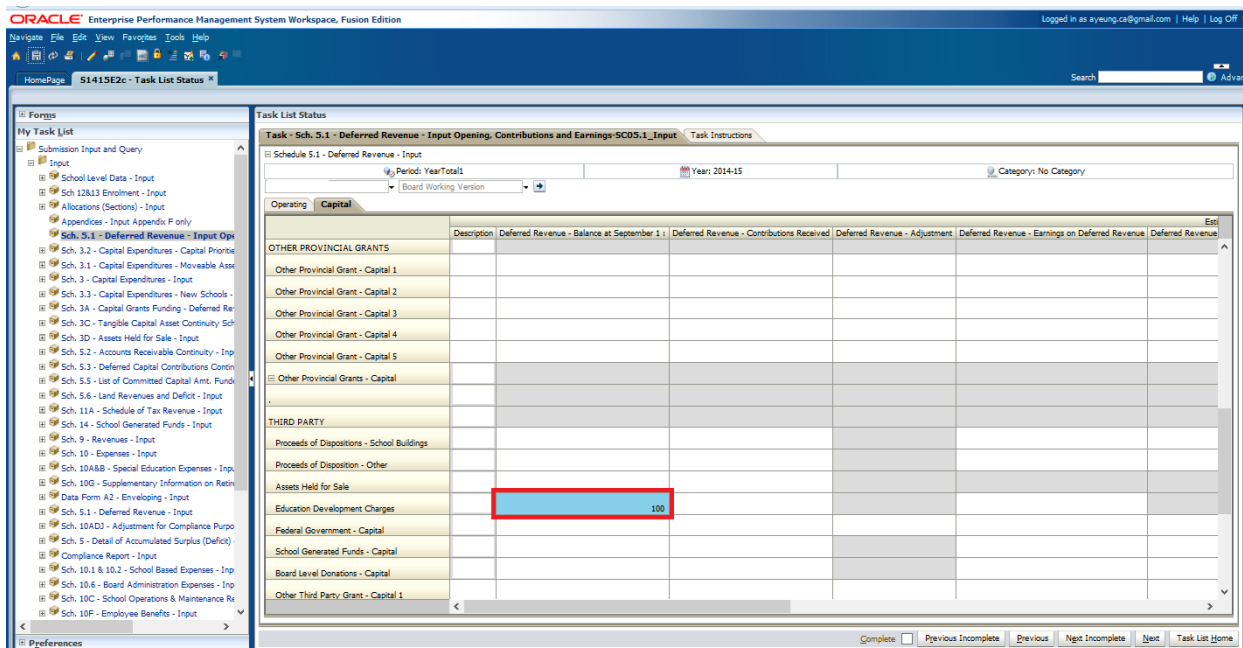
Task - Adjustable Prior Year Data

		Landing Version Estimates	Board Working Version Estimates
SCHEDULES/TABEAU 3A			
Remaining Approved Amounts or Opening Deferred Revenue :	No Category		
NPP and GPL Other		0	0
GPL Renewal		0	0
Full Day Kindergarten		451,623	451,623
Capital Priorities - Major Capital Programs		0	0
Capital Priorities - Land		0	0
SCHEDULES/TABEAU 5.1			
Deferred Revenue - Balance at September 1 :	No Category		
Education Development Charges		100	0
Energy Efficient Schools - Capital		0	0
School Renewal		3,812,993	3,812,993
Renewable Energy - Capital		0	0
School Condition Improvement		245,938	245,938
Retrofitting School Space for Child Care		248,030	248,030
SCHEDULES/TABEAU 5.2			
Approved Capital AR - Opening Balance at September 1 :	No Category		
NPP and GPL Other		1,083,434	10,295,586
GPL Renewal		0	0
Full Day Kindergarten		2,265,651	21,621,482
OFA		92,142,249	78,868,329
Non-OFA (inc. Sinking Fund Debentures)		0	48,723,223
Capital Priorities - Land		0	0
Capital Priorities - Major Capital Programs		847,678	0
SCHEDULES/TABEAU 5.5			
Acc. Surplus at Sept 1 committed to fund SF:	No Category		
Depreciable Capital Project :		0	0
Cumulative interest earned as at Aug 31 2014:	No Category		
Depreciable Capital Project :		0	0

Board user updates the Board Working Version with the updated value and selects **Save**. The data is saved to the Board Working Version Column and the purple highlight remains to indicate the data has changed.



The original Educational Development Charges – Balance at September 1 that was loaded from Prior Year submission at the start of the cycle into Schedule 5.1 is now Working updated with the new data.



9.3 Non Adjustable Prior Year Data

There is also prior year data that is used in the current year’s submission that cannot be updated by the user directly in any form, an example of this is the Cost – Opening Balance September 1 in Schedule 3C. This data is also compared on a nightly basis and displayed on the **Prior Year Non Adjustable Data** form. If changes are found the **Landing Version Column** is updated with the new data and the variance is displayed in highlighted purple in the Board Data Load **Variance Version column** and the **Is there updated prior year data** flag is set to **Yes**. The user has the option to update the submission with the new data or leave the current data. Data that has been changes and not updated to the current submission will remain highlighted in purple

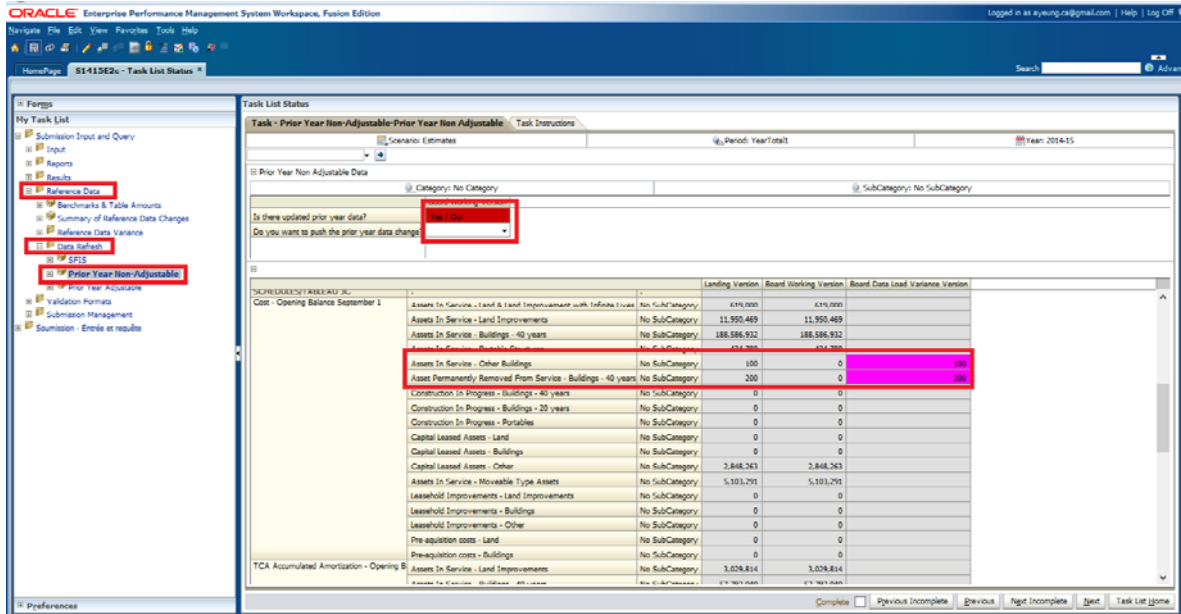
The section below describes the update process.

At the start of the cycle the amount loaded into Schedule 3C from prior year for **Assets in Service – Other Buildings** and **Asset Permanently Removed From Service – Buildings – 40 Years** was 0

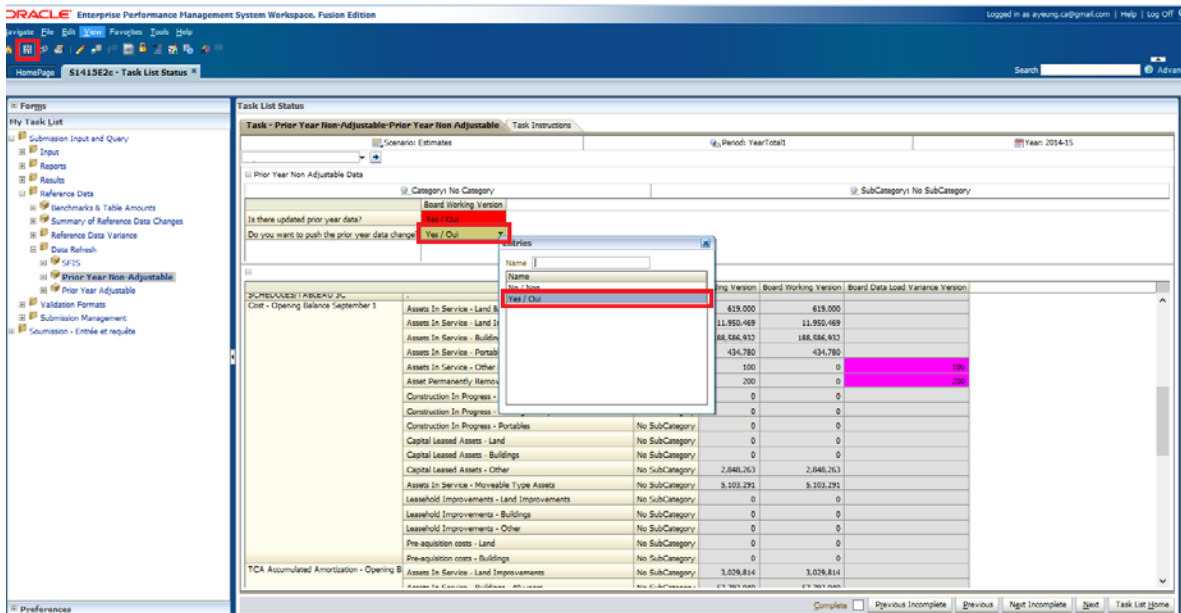
TCA Gross Book Value	TCA Acc. Amort	TCA NBV & POD	Estimates	Estimates	Estimates	Estimates	Estimates
			Cost - Opening Balance September 1	Cost - Adjustments to Opening Balance	Cost - Transfers Between Asset Class	Cost - Additions and Betterments	Cost - Disposals-Deemed Disposals
Assets In Service - Land & Land Improvement with Infinite Lives			619,000				
Assets In Service - Land Improvements			11,950,469				
Assets In Service - Buildings - 40 years			188,586,937				
Assets In Service - Other Buildings			0				
Assets In Service - Portable Structures			434,780				
Assets In Service - Moveable Type Assets			5,103,291				
Total Assets In Service			206,694,472				
Leasehold Improvements - Land Improvements			0				
Leasehold Improvements - Buildings			0				
Leasehold Improvements - Other			0				
Total Leasehold Improvements			0				
Asset Permanently Removed From Service - Buildings - 40 years			0				
Total Asset Permanently Removed From Service			0				
Construction In Progress - Buildings - 40 years			0				
Construction In Progress - Buildings - 20 years			0				
Construction In Progress - Portables			0				
Pre-acquisition costs - Land			0				
Pre-acquisition costs - Buildings			0				
Total Construction In Progress Assets			0				

A change is made to the closing balance of these two assets in the Prior Year's Submission. The data is updated to the **Landing Version** column and the Board Data Variance Version column and highlighted in Purple. The **Is there updated prior year data** flag is set to **Yes**.

Select → Reference Data → Data Refresh → Prior Year Non-Adjustments



To update the data the user selects **Yes** from the dropdown list and selects **Save**. **Note:** when the user selects to update the data all values that are highlighted in purple will be updated the user cannot select individual values



The updated data will be loaded into the Board Working Version column and the corresponding schedule / section. The Board Data Load Variance Column will be empty and the **Is there updated prior year data** flag will be set to blank

Task - Prior Year Non-Adjustable

Scenario: Estimates | Period: YearTotal | Year: 2014-15

Category: No Category | Sub-Category: No Sub-Category

Is there updated prior year data? **Board Working Version**

Do you want to push the prior year data change?

			Landing Version	Board Working Version	Board Data Load Variance Version
Day School ADE of POB	No Category	No Sub-Category	9,167	9,167	
SCHEDULES/TABLEAU 3C					
Cost - Opening Balance September 1					
Assets In Service - Land & Land Improvement with Infinite Lives	No Sub-Category		619,000	619,000	
Assets In Service - Land Improvements	No Sub-Category		11,950,469	11,950,469	
Assets In Service - Buildings - 40 years	No Sub-Category		188,586,932	188,586,932	
Assets In Service - Portable Structures	No Sub-Category		434,780	434,780	
Assets In Service - Other Buildings	No Sub-Category		100	100	
Asset Permanently Removed From Service - Buildings - 40 years	No Sub-Category		200	200	
Construction In Progress - Buildings - 40 years	No Sub-Category		0	0	
Construction In Progress - Buildings - 20 years	No Sub-Category		0	0	
Construction In Progress - Portables	No Sub-Category		0	0	
Capital Leased Assets - Land	No Sub-Category		0	0	
Capital Leased Assets - Buildings	No Sub-Category		0	0	
Assets In Service - Moveable Type Assets	No Sub-Category		5,103,291	5,103,291	
Leasehold Improvements - Land Improvements	No Sub-Category		0	0	
Leasehold Improvements - Buildings	No Sub-Category		0	0	
Leasehold Improvements - Other	No Sub-Category		0	0	
Pre-acquisition costs - Land	No Sub-Category		0	0	
Pre-acquisition costs - Buildings	No Sub-Category		0	0	

Schedule 3C will now contain the updated Prior Year data.

Task - Sch. 3C - Tangible Capital Asset Continuity Schedule - Input-SC03C_Input

Scenario: Estimates | Period: YearTotal | Year: 2014-15

Category: No Category | Sub-Category: No Sub-Category

Board Working Version

	Estimate	Estimate	Estimate	Estimate	Estimate
	Cost - Opening Balance September 1	Cost - Adjustments to Opening Balance	Cost - Transfers Between Asset Class	Cost - Additions and Betterments	Cost - Disposals-Deemed Disposals
Assets In Service - Land & Land Improvement with Infinite Lives	619,000				
Assets In Service - Land Improvements	11,950,469				
Assets In Service - Buildings - 40 years	188,586,932				
Assets In Service - Other Buildings	100				
Assets In Service - Portable Structures	434,780				
Assets In Service - Moveable Type Assets	5,103,291				
Total Assets In Service	206,694,572				
Leasehold Improvements - Land Improvements	0				
Leasehold Improvements - Buildings	0				
Leasehold Improvements - Other	0				
Total Leasehold Improvements	0				
Asset Permanently Removed From Service - Buildings - 40 years	200				
Total Asset Permanently Removed From Service	200				
Construction In Progress - Buildings - 40 years	0				
Construction In Progress - Buildings - 20 years	0				
Construction In Progress - Portables	0				
Pre-acquisition costs - Land	0				
Pre-acquisition costs - Buildings	0				
Total Construction In Progress Assets	0				

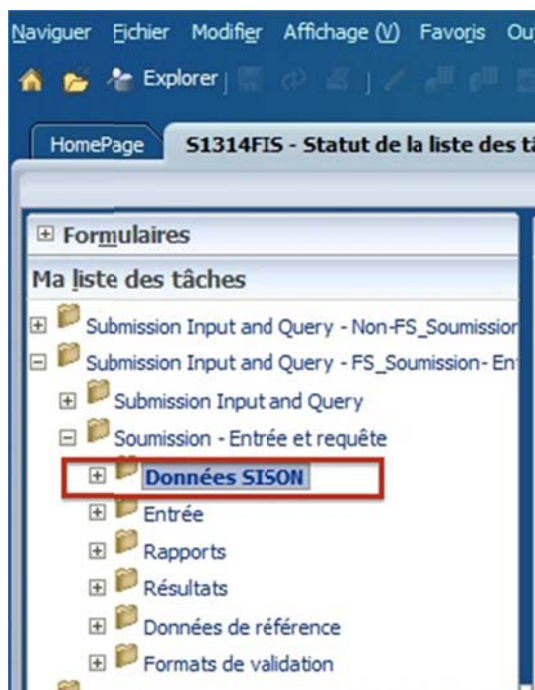
10 OnSIS Data

In the EFIS2.0 Financial Statement reporting cycle, Enrolment data will be loaded directly from the ONSIS system. Boards will update all changes to enrolment data in ONSIS and EFIS 2.0 will load data from ONSIS on a nightly basis. Boards will be able to view detailed data in the ONSIS viewing area similar to the current Enrolment Verification Application. For schools (BSID) that belong to more than 1 facility, a process will be available to allow the Board to allocate the enrolment between the individual facilities. Financial Officers and Administrators will have the ability to adjust school level data prior to making FO Active Version.

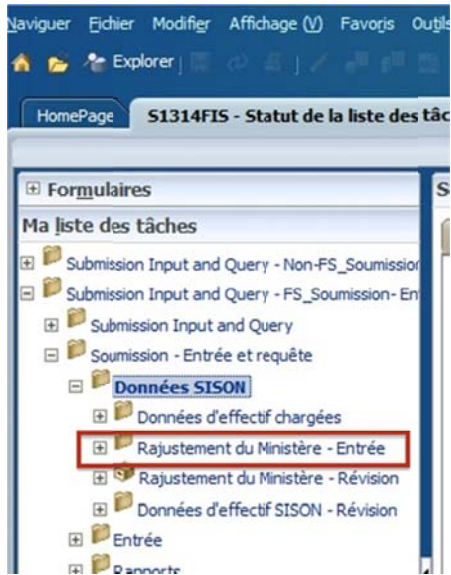
10.1 Data Viewing Area

To view and review the OnSIS data in the EFIS 2.0, the following tabs are available.

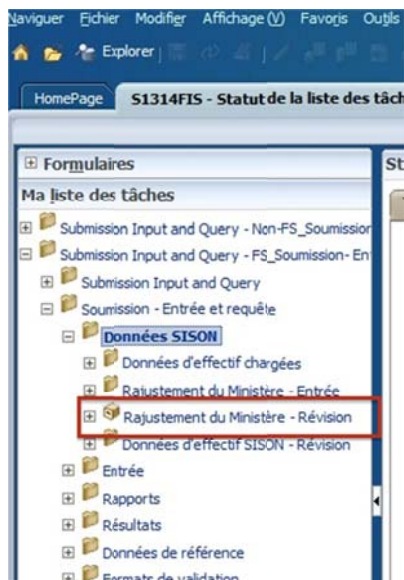
Loaded data from the OnSIS will go into *Submission Input and Query/OnSIS Data/Loaded Enrolment Data* Tab.



Ministry can make the updates and changes directly in the EFIS 2.0, Boards can view the changes under the *Ministry Adjustment- Input* tab



All the changes to the adjustment are to be reviewed in the **Ministry Adjustment-Review** tab

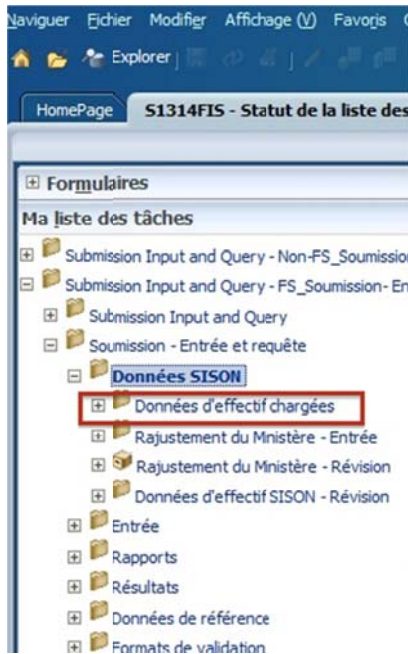


When the OnSIS load updates the records in the EFIS 2.0, user can review all the records that have been updated under **OnSIS Enrolment Data Review** tab

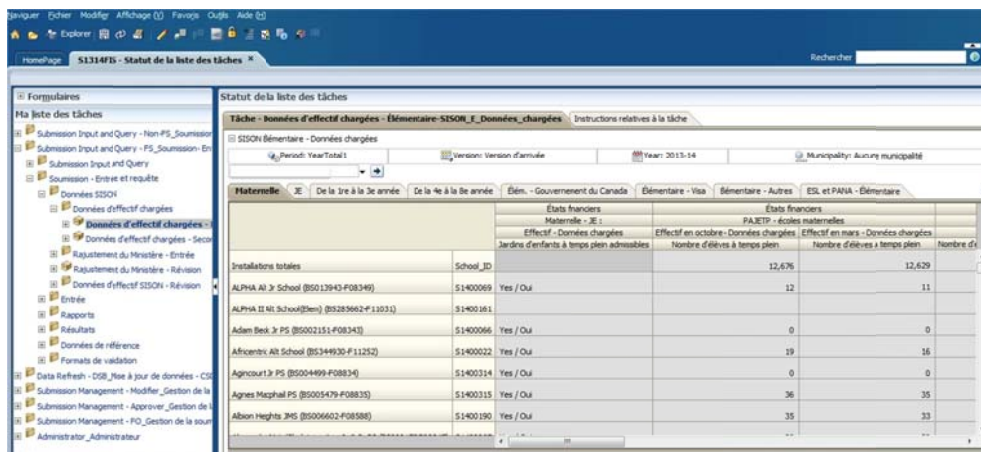


10.1.1 Loaded Enrolment Data Tab

Loaded Enrolment Data tab under *Submission Input and Query/OnSIS Data/* contains the data loaded directly from OnSIS that is read only for all users. The form is separated into Elementary and Secondary,

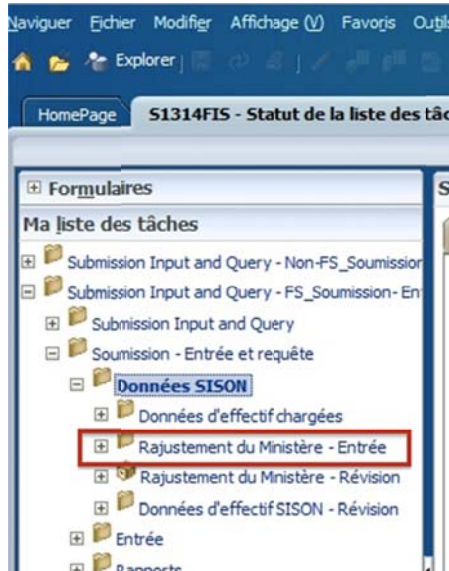


Which are then subdivided into different subcategories depending of enrolment input



10.1.2 Ministry Adjustment-Input (Ministry user only)

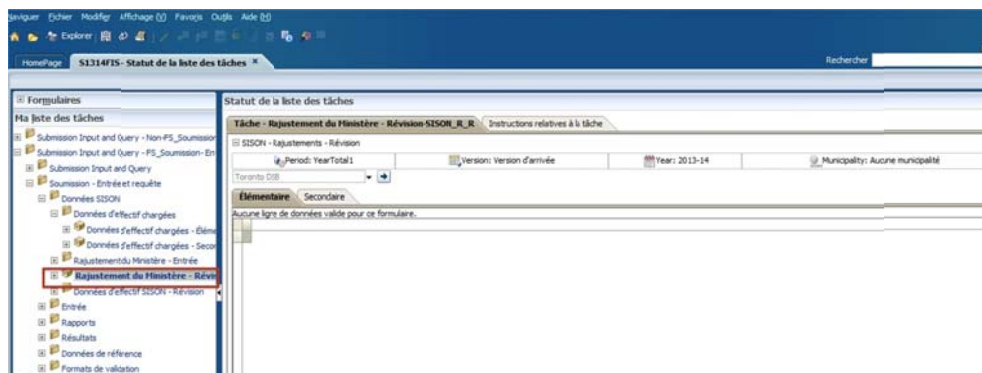
Before promoting to FO Active, FO/FA can make adjustment to the OnSIS load directly in the EFIS2.0 under *Submission Input and Query/OnSIS Data/ Ministry Adjustment-Input* The form is separated into Elementary and Secondary,



Which are then subdivided into different subcategories depending of enrolment input

10.1.3 Ministry Adjustment Review

After FO/FA makes the adjustment, the changes can be reviewed under *Submission Input and Query/OnSIS Data/Ministry Adjustment Review* tab. The form is separated into Elementary and Secondary,



10.1.4 OnSIS Enrolment Data Review

After initial load, if there are changes in the OnSIS, the OnSIS process will load those changes into EFIS2.0. User can review all the records that have been updated under *Submission Input and Query/OnSIS Data/ OnSIS Enrolment Data Review* tab



The Records are read only and cannot be changed. All the changes regarding OnSIS have to be performed in the OnSIS application, which will, through the nightly upload update the EFIS2.0 records.

10.2 Multiple BSID

To accommodate the situation where records for multiple BSIDs are loaded to a single Facility/School_ID combination, a read-only text field will display a list of all applicable BSIDs that are mapped to the loaded record. This relationship must be specified in the staging area before the ONSIS data file is loaded. This process will be generated by admin.

Elementary

Statut de la liste des tâches

Tâche - Données d'effectif chargées - Élémentaire-SISON_E_Données_chargées

SISON Élémentaire - Données chargées

Period: YearTotal1 | Version: Version d'arrivée | Year: 2013-14 | Municipality: Aucune municipalité

Toronto DSB

Maternelle | JE | De la 1re à la 3e année | De la 4e à la 8e année | **Élém. - Gouvernement du Canada** | Élémentaire - Visa | Élémentaire - Autres | ESL et PANA - Élémentaire

		Effectif en mars - Données chargées				États financiers
		Nombre d'élèves à temps plein	Nombre d'élèves temps partiel	ETP des élèves à temps partiel	Équivalent temps-plein	Élémentaire
						Aucune catégorie
						OnSIS Child BSIDs
Installations totales	School_ID	4,541	12	3.6	8,774.6	
ALPHA Alt Jr School (BS013943-F08349)	S1400069	0	0	0	5.5	
ALPHA II Alt School(Elem) (BS285662-F11031)	S1400161					
Adam Beck Jr PS (BS002151-F08343)	S1400066	51	0	0	25.5	
Africentric Alt School (BS344930-F11252)	S1400022	0	0	0	8	
Agincourt Jr PS (BS004499-F08834)	S1400314	29	0	0	14.5	
Agnes Macphail PS (BS005479-F08835)	S1400315	0	0	0	17.5	
Albion Heights JMS (BS006602-F08588)	S1400190	0	0	0	16.5	

Secondary

Statut de la liste des tâches

Tâche - Données d'effectif chargées - Secondaire-SISON_S_Données_chargées

SISON Secondaire - Données chargées

Period: YearTotal1 | Version: Version d'arrivée | Year: 2013-14 | Municipality: Aucune municipalité

Toronto DSB

De la 9e à la 12e année | Crédit élèves 9e à la 12e année | Années 9 à 12 (21 ans et plus) | **Sec. - Gouvernement du Canada** | Sec. - Gouvernement du CA (21+) | Secondaire - Visa

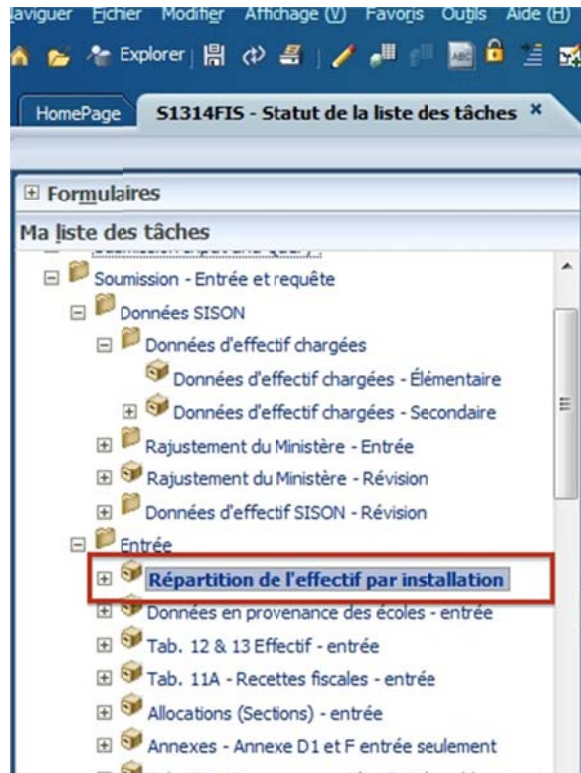
		Effectif en mars - Données chargées				États financiers
		Nombre d'élèves à temps plein	Nombre d'élèves temps partiel	ETP des élèves à temps partiel	Équivalent temps-plein	Secondaire
						Aucune catégorie
						OnSIS Child BSIDs
Installations totales	School_ID	74,093.4600	1,194	577.9600	74,671.4200	
A Y Jackson SS (BS090227-F09040)	S1400478	790	13	5.5	795.5	
ALPHA II Alternative School(Sec) (BS901908-F13756)	S1400161	53	0	0	53	
ASE I (BS892475-F08840)	S1400319	98.31	2	1.1400	99.45	
Agincourt CI (BS890723-F08833)	S1400313	1,328.64	8	4.98	1,333.6200	
Albert Campbell CI (BS890880-F08837)	S1400316	1,376.56	1	0.5	1,377.06	
Avondale Alt SS (BS890120-F09048)	S1400483	64.11	4	1.81	65.92	
Bendale BTI (BS394621-F08846)	S1400324	351.2	9	4.32	355.52	

Terminé Incomplète précédente Précédent Incomplète suivante Suivant Page d'accueil de liste des tâches

10.3 Facility- Based Data Distribution

Boards can have one school that has multiple facilities. However, in the ONSIS system there is only one BSID number and as a result the total enrolment for both facilities is reported as one school. For GSN purposes the Board is required to allocate manually the enrolment between the 2 facilities.

Form to distribute the facility is to be found under Submission Input and Query/ Input/ Facility Based Enrolment Distribution.



In the example below the data is loaded into the second facility under the “Loaded October Enrolment” column. The second column, “October Enrolment – Distribution” is open for input and allows the user to enter the distribution values.

Statut de la liste des tâches

Tâche - Répartition de l'effectif par installation-SISON_Distribution

SISON - Redistribution de l'effectif

Period: YearTotal1 Year: 2013-14 Municipality: Aucune municipalité

Version de travail du conseil

Élémentaire Secondaire

		Maternelle (Mat)		Jardin d'é
		Effectif en octobre - Données chargées	Distribution de l'effectif en octobre	Effectif en octobre - Données chargées
Donwood Park JPS - Annex (BS141771-F08941)	S1400062			
Donwood Park Jr PS (JK - Gr 3) (BS141771-F08863)	S1400338	42		
BS141771	Aucun identifiant d'école			
Missing School Name (BS264695-F08463)	S1400148			
Horizon Alt Sr School (BS264695-F24314)	S1400084			
BS264695	Aucun identifiant d'école			
Palmerston Ave Jr PS (BS432326-F08414)	S1400115	26.5		29
Palmerston Ave Jr PS - Annex (BS432326-F24249)	S1400115			
BS432326	Aucun identifiant d'école			
Wilkinson Jr PS (BS67177-F08519)	S1400184	15.5		24

Boards will allocate the enrolment by entering a negative amount for one of the facilities and a positive amount for the other. Any allocation that has been made will be retained each time there is new data

loaded, and if the allocation needs to be changed the boards will be required to change the amount of the allocation. Distributions are only applicable to facilities that belong to multiple BSIDs. Distributions are required to be zero sum adjustments for each School ID; if not, a validation error will be triggered to prevent promotion of the current Submission.

An example of the data being improperly distributed between two facilities (the sum of the two distributed amounts does not equal to zero). The non-zero total is highlighted in red.

Statut de la liste des tâches

Tâche - Répartition de l'effectif par installation-SISON_Distribution Instructions relatives à la tâche

SISON - Redistribution de l'effectif

Period: YearTotal1 Year: 2013-14 Municipality: Aucune municipalité

Version de travail du conseil

Élémentaire Secondaire

		Maternelle (Mat)		Jarc
		Effectif en octobre - Données chargées	Distribution de l'effectif en octobre	Effectif en octobre - Données d
Donwood Park JPS - Annex (BS141771-F08941)	S1400062		23	
Donwood Park Jr PS (JK - Gr3) (BS141771-F08863)	S1400338	42	12	
BS141771	Aucun identifiant d'école		35	
Missing School Name (BS264695-F08463)	S1400148			

An example of the data being properly distributed between two facilities

Statut de la liste des tâches

Tâche - Répartition de l'effectif par installation-SISON_Distribution Instructions relatives à la tâche

SISON - Redistribution de l'effectif

Period: YearTotal1 Year: 2013-14 Municipality: Aucune municipalité

Version de travail du conseil

Élémentaire Secondaire

		Maternelle (Mat)		J
		Effectif en octobre - Données chargées	Distribution de l'effectif en octobre	Effectif en octobre - Donnée
Donwood Park JPS - Annex (BS141771-F08941)	S1400062		21	
Donwood Park Jr PS (JK - Gr3) (BS141771-F08863)	S1400338	42	(21)	
BS141771	Aucun identifiant d'école		0	
Missing School Name (BS264695-F08463)	S1400148			
Horizon Alt Sr School (BS264695-F24314)	S1400084			

The distributions are version specific, so distribution changes are retained within the version in which they were made. Below we can see that since the distribution in the above example was made in Board Working Version, the Board Draft 1 version was not changed.

Statut de la liste des tâches

Tâche - Répartition de l'effectif par installation-SISON_Distribution Instructions relatives à la tâche

SISON - Redistribution de l'effectif

Period: YearTotal 1 Year: 2013-14 Municipality: Aucune municipalité

Trouvillon du conseil 1

Élémentaire Secondaire

		Maternelle (Mat)	Jardin d'é
		Effectif en octobre - Données chargées	Effectif en octobre - Données chargées
Donwood Park JPS - Annex (BS141771-F08941)	S1400062		
Donwood Park Jr PS (JK - Gr3) (BS141771-F08863)	S1400338	42	
BS141771	Aucun identifiant d'école		
Missing School Name (BS264695-F08463)	S1400148		
Horizon Alt Sr School (BS264695-F24314)	S1400084		

Result of the distribution can be seen in the School Level Enrolment forms, under Board Working Version.

School Level Enrolment Before:

Statut de la liste des tâches

Tâche - Données en provenance des écoles - entrée-Effectif école - Entrée Instructions relatives à la tâche

Effectif école - Entrée

Period: YearTotal 1 Year: 2013-14 Municipality: Aucune municipalité

Toronto DSB version de travail du conseil

Élémentaire (EF) Secondaire (EF)

Period: YearTotal 1 Year: 2013-14 Municipality: Aucune municipalité

Version de travail du conseil

		États financiers			
		Ajusté en fonction de la capacité réelle selon le SIIS			
		Aucune catégorie		Inscriptions en octob	
		Élémentaire	Maternelle (Mat)	Jardin d'enfants (JE)	De la 1re à la 3e année
Dixon Grove JMS (BS140996-F08607)	S1400202	900	15	19	87
Don Mills MS (BS141380-F09096)	S1400516	381			
Don Valley JHS (Elem) (BS141410-F09097)	S1400050	303			
Donview MS (BS141640-F09099)	S1400517	662			
Donwood Park JPS - Annex (BS141771-F08941)	S1400062	679			
Donwood Park Jr PS (JK - Gr3) (BS141771-F08863)	S1400338	412	42	44	244
Dorset Park PS (BS142816-F08864)	S1400339	381	10	10.5	73

School Level Enrolment After:

Statut de la liste des tâches

Tâche - Données en provenance des écoles - entrée-Effectif école - Entrée Instructions relatives à la tâche

Effectif école - Entrée

Period: YearTotal 1 Year: 2013-14 Municipality: Aucune municipalité

Toronto DSB version de travail du conseil

Élémentaire (EF) Secondaire (EF)

Period: YearTotal 1 Year: 2013-14 Municipality: Aucune municipalité

Version de travail du conseil

		États financiers			
		Ajusté en fonction de la capacité réelle selon le SIIS			
		Aucune catégorie		Inscriptions en octob	
		Élémentaire	Maternelle (Mat)	Jardin d'enfants (JE)	De la 1re à la 3e année
Don Valley JHS (Elem) (BS141410-F09097)	S1400050	303			
Donview MS (BS141640-F09099)	S1400517	662			
Donwood Park JPS - Annex (BS141771-F08941)	S1400062	679	21		
Donwood Park Jr PS (JK - Gr3) (BS141771-F08863)	S1400338	412	21	44	244
Dorset Park PS (BS142816-F08864)	S1400339	381	10	10.5	73

11 Appendix A

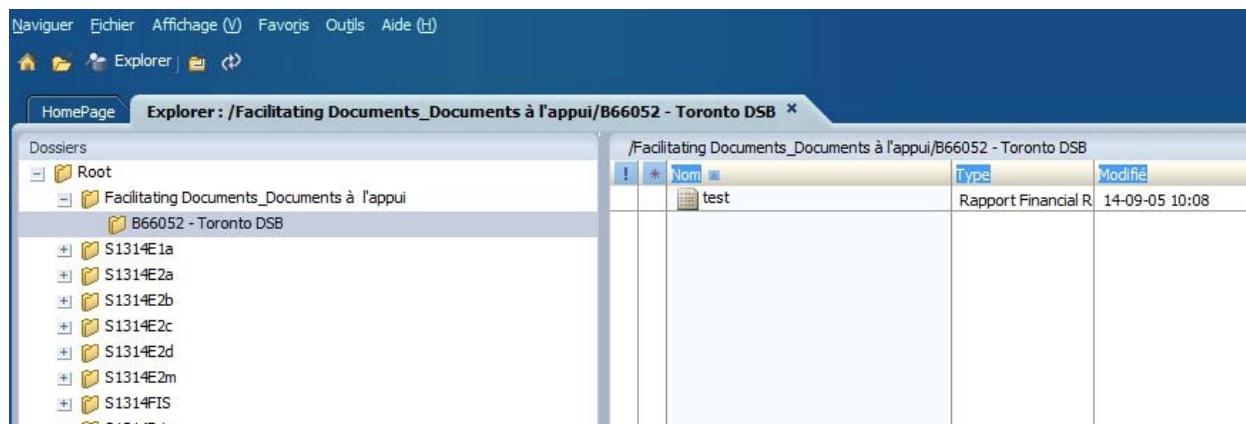
11.1 Accessing files as a Board User

Ministry will upload files for Boards to download. To access and download the files please follow the steps below

1. Log into Planning system



2. Go to Explore > Facilitating Documents > DSB folder



3. Open the desired document to begin download process

