Ministry of Education

EFIS 2.0 - User Guide First Nations User

Version 1.0

June 2015

Table of Contents

| 1. Docume | nt Histo | ory | 1 | | | | | |
|-------------|----------|---|----|--|--|--|--|--|
| 2. EFIS 2.0 | : Login | | 2 | | | | | |
| 2.1. | Loggin | g inwith Go Secure | 2 | | | | | |
| 2.2. | Bookm | arking the EFIS 2.0 URL | 3 | | | | | |
| 3. User Set | t Up | | 4 | | | | | |
| 3.1. | At the S | Start of a New Reporting Cycle | 4 | | | | | |
| 3.2. | Reporti | Reporting Settings | | | | | | |
| 3.3. | Display | Options | 6 | | | | | |
| 3.4. | Setup y | /our Home Page | 7 | | | | | |
| 3.5. | Change | e Language ### REMOVE the change language section | 8 | | | | | |
| | 3.5.1. | Firefox | 8 | | | | | |
| | 3.5.2. | IE | 9 | | | | | |
| | 3.5.3. | Set Language in Planning | 10 | | | | | |
| 4. Planning | g Naviga | ation | 12 | | | | | |
| 4.1. | Selectin | ng an Application (Doc Set) | 12 | | | | | |
| 4.2. | EFIS 2 | .0 Task List | 13 | | | | | |
| | 4.2.1. | Expand and Collapse Task List | 14 | | | | | |
| 4.3. | How to | Navigate in Planning using Task List | 18 | | | | | |
| | 4.3.1. | Input and Results Data Navigation | 18 | | | | | |
| | 4.3.2. | Reports Data Navigation | 20 | | | | | |
| | 4.3.3. | Submission Management Navigation | 22 | | | | | |
| 5. Data Inp | ut | | 24 | | | | | |
| 5.1. | Data In | put and Results – Forms | 24 | | | | | |
| | 5.1.1. | Opening a Form | 24 | | | | | |
| | 5.1.2. | Enable Input Field | 24 | | | | | |
| | 5.1.3. | Key in Input Field | 25 | | | | | |
| | 5.1.4. | Save input field | 27 | | | | | |
| | 5.1.5. | Invalid Data | 28 | | | | | |
| 5.2. | Reports | 5 | 30 | | | | | |
| | 5.2.1. | Running a Report | 31 | | | | | |
| | 5.2.2. | Generating Report Books | 35 | | | | | |

| | 5.2.3. | Opening a report in Excel | 37 |
|------------|---------|--|----|
| 6. Submiss | sion Ma | nagement | 40 |
| 6.1. | Overvi | ew of Versions | 40 |
| | 6.1.1. | Copy Data from Working Version to FA Viewable Version | 40 |
| | 6.2.1. | Version Description and Summary Dashboard in the task list | 42 |
| 6.2. | Approv | als Process –Modifier | 42 |
| | 6.2.1. | Flag Submission for Approval | 43 |
| | 6.2.2. | Validate Submission | 43 |
| | 6.2.3. | Promote Submission | 47 |
| 6.3. | Manag | e Approvals –Approver | 49 |
| | 6.3.1. | Approve and Sign-off | 50 |
| | 6.3.2. | Reject and return submission to the Modifier | 51 |
| | 6.3.3. | Submission with Error Override | 53 |
| | 6.3.4. | Checking the Submission History | 57 |

1. Document History

| Version | Date | Changed by | Description of changes |
|---------|--------------|-------------|------------------------|
| 1.0 | June 5, 2015 | Rob Narejko | Initial draft |
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2. EFIS 2.0: Login

2.1. Logging inwith Go Secure

EFIS 2.0 URL:

https://efis.fma.csc.gov.on.ca/workspace/index.jsp

In order to log into EFIS 2.0, you need a Go Secure account.

If you have yet to register, please follow the instructions in the registration Guide: (EFIS_User_Registration_Instructions_Final_English).

The EFIS URL above will open the Go Secure login page. Please enter your *User ID* and *Password.*

By clicking on *Sign In button,* you will be directed into the EFIS 2.0 application.

| ^{>} Ontario | | Fr |
|--|--|---|
| | | Environment: g |
| GO SECURE LOGIN | Sign In GO Secure ID : | |
| oviding secure online resources for individuals within the tario and Broader Public Sectors. D Secure Profile ee your profile, change password or security questions) | Password : | Don't have an account? |
| O Secure Login - Delegated Administration or administrators of user access and resources) | Sign In Forgot your ID or password? | Register NOW |
| CT US ACCESSIBILITY PRIVACY HELP | © QUEEN'S PRINTER FOR ONTARIO, 20 | D12 IMPORTANT NOTICES ENV ID: GDC SYSTI LAST MODIFIED: 201 |

2.2. Bookmarking the EFIS 2.0 URL

Once you have successfully **logged into EFIS 2.0**, you can create a bookmark for easy access.

Follow these steps to create a bookmark:

• ### Rob to create the steps



3. User Set Up

At the beginning of **each** reporting cycle (the Interim Report and Financial Statements), you are required to set up your user preferences.

3.1. At the Start of a New Reporting Cycle

Whenever the Ministry releases a new reporting application, is a good practice to clear your Browser cache. This is done by selecting "clear recent history" from your browser menu and selecting "clear all". Here are the steps for clearing the cache:

• ### Rob N: insert screen shots

3.2. Reporting Settings

In order to generate reports, at the beginning of each reporting cycle, you will have to complete a **one- time setup** of the "User Point of View":

| ORA | | nterprise | e Performa | ance Mar | nagement System Workspace, Fusion Edition |
|------------------|-------------------|-------------------|------------|---------------|---|
| <u>N</u> avigate | <u>File E</u> dit | <u>V</u> iew | Favorites | <u>T</u> ools | <u>H</u> elp |
| 🚮 J 📰 🗌 | <u>O</u> pen | | • | | |
| | 🗊 Open in | Smart <u>V</u> ie | W | | |
| HomeF | Close | | • | | |
| - | <u>Save</u> | | | | |
| 🕀 Forn | 😑 Print | | | | Task List Status |
| Mu Tas | Pre <u>f</u> ere | nces | | | |
| | Log Off | f | | | Task List Status - All |
| 🕀 🚩 Su | E <u>x</u> it | | | | |
| | | | | | Incomplete, 100.0% |

When you are logged into EFIS, select File then click on Preferences.

- 1. In the popup screen select Financial Reporting on the left hand side.
- 2. Under Default Preview Mode select PDF Preview.
- 3. In User Point of View, select "On" and click on Setup Members

| Financial Reporting General Authentication Image: Privace Preview Preview Office 2002 ~ h Image: Privace Image: Privace Image: Privace Preview Image: Privace Image: Priva | Preferences | | | 2 |
|--|--|--|---|----|
| General Default Preview Mode Export to Office Application: Authentication Image: HTML Preview Mode Office 2002 ~ h Image: Displayed by the second by the sec | ⋨= | - Financial Reporting | | |
| | General Authentication Financial Reporting Web Analysis Web Analysis Planning | Default Preview Mode HTML Preview PDF Preview User Point of View Preview Off On Setup Members Merge Equivalent Prompts Annotation Print Details | Export to Office Application: Office 2002 ~ h v Thousands Separator Ocomma Period Underscore Space Decimal Separator Comma Period Underscore Space Date Value Format MMM d, yyyy v Query Ready Mode Smart View | |
| | Help | | OK Cape | el |

- 4. In the resulting **Setup User POV** pop-up screen, click on the **Database Connection** dropdown.
- 5. For database connections, select the corresponding reporting cycle and then click `Refresh`.
 - a. For example, the name of the application is: **F1415FIS_Planning_Main**.
- ### SCREEN better screen shot Rob N

| 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: | P1415FSP_Planning_Main Refresh | |

After you have selected the correct database, it is important that you make the following selections and click *Apply:*

- For all dimensions, select: All Members
- For "Display Member Label as", choose: Default
- For "Dimension Labels are", choose: Included
- For "Member Selection Displays", select: Only Members I Can Access

| Database Connection | | ning Main - Defeat | |
|--|----------------|---------------------|-----|
| Database Connection. | P1415F5P_Plan | ning_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 |
| Recipient | 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 | 5. | | |
| | | | |

- Click **Apply** to save your changes.
- Click **OK** to close the Setup User POV dialog.
- Click **OK** to close the Preferences dialog.

3.3. Display Options

Once you open a form for the first time to enter data, you should also set your display preferences. To set your display preferences, please select: *File* then click on *Preferences*.

On the Preferences screen:

- 1. Click on *Planning*
- 2. Then select Display Options
- 3. Select the desired *Number Formatting* from the dropdown list:

- Thousands Separator Comma
- **Decimal Separator** Dot
- **Negative sign** Paraenthesis
- Negative Color black
- 4. First click on **Save** and then click **OK** to save your changes.
- ### Rob N new screen shot to show the last 2 steps

| Preferences | | × |
|---------------------|---|--|
| ¥= | Application Settings Display Options Printing | Options User Varia <u>b</u> le Options |
| General | Number Formatting | Use Application Default |
| Authentication | Thousands Separator Decimal Separator Negative Sign Negative Color | Comma v Dot v Parentheses v Black v |
| 2 X | Page Options | Use Applica <u>t</u> ion Default |
| Financial Reporting | Remember selected page members Allow Search When Number of Pages Exceeds Indentation of Members on Page | Yes v 100 Indent based on hierarchy v |
| Web Analysis | Other Options | Use Applica <u>t</u> ion Default |
| - Jan Barra | Show consolidation operators Warn if form larger than cells specified | Form Setting 🔽 🗌 |
| Planning | UI Theme | Normal |
| | Text Size | Normal VYYY-MM-DD |
| | | Save Reset |
| Help | | OK Cancel |

3.4. Setup your Home Page

You can setup a home page to quickly access your applications.

- Select File \rightarrow Preferences \rightarrow General
- From the content dropdown select Home Page then OK.

| Preferences | | | | |
|--|-------------|--|------------|---------|
| Default Startup Options General Content: Home Page | Preferences | | | × |
| Help OK Cancel | Preferences | fault Startup Options ntent: Iome Page | Use Curren | nt Page |
| T16 | Help | | <u>о</u> к | Cancel |

3.5. Change Language ### REMOVE the change language section

3.5.1. Firefox

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

| ම | | Oracle Enterprise Performance Management Sy |
|--|--|---|
| <u>F</u> ile <u>E</u> dit <u>V</u> iew Hi <u>s</u> tory <u>B</u> ookmarks <u>T</u> o | ols <u>H</u> elp | |
| Oracle Enterprise Performance Manag | Downloads Ctrl+J Add-ons Ctrl+S Set Up Sync Ctrl+S | Shift+A |
| CRACLE [®] Enterprise Perforr Elle Log On | Web Developer Page Info Monitor with Fiddler Start Private Browsing Ctrl+S Clear Recent History Ctrl+S | hift+P Shift+Del |
| | <u>O</u> ptions | |
| | | User Name: |

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.

| Options | | | | | - | - | × | | Search | |
|--|---|-----------------------|--------------------|---------|----------|------------------|----------------|--|---------------------|-------------------------------|
| General | Tabs | 页 Content | Applications | Privacy | Security | Sync | Advanced | | | |
| ☑ Block ☑ Load ☑ Enabl Fonts & C ☑ Default for | pop-up w images au e JavaScrip olors nt: Time | t somatically t | an | Thivacy | Size: 16 | Exc Exc Ad | vanced | Languages Web pages are sometime Choose languages for dis preference. | Soffered in mon | A 🛛 🕅 🕅 🕅 🕅 🕅 🕅 🕅 🖉 🕺 🕺 🕺 🕺 🕺 |
| Language | s | | | | | | | Languages in order of pr English/United States [e | eference: en-us] | Move <u>U</u> p |
| Choose y | our preferr | ed language | e for displaying p | oages | | | h <u>o</u> ose | English [en] | | Move <u>D</u> own |
| | | | | | | | | | | Remove |
| | | | | | | | | French/Canada [fr-ca] | | → <u>A</u> dd |
| | | | | ОК | Canc | el | Help | ОК | Cance | el <u>H</u> elp |

3.5.2. IE

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

| File | Edit | View | Favorites | Tools Help | | | |
|------|------|------|---|---|--------------------------------|------------------------------|------------------------------|
| | | | | Delete browsing history InPrivate Browsing Tracking Protection ActiveX Filtering Diagnose connection problems Reopen last browsing session Add site to Start menu | Ctrl+Shift+Del Ctrl+Shift+P | | |
| | | | View downloads Pop-up Blocker SmartScreen Filter Manage add-ons Compatibility View Compatibility View settings Subscribe to this feed Feed discovery Windows Update | Ctrl+J | ≥ Ontario | GO Secure ID : Password : | |
| | | | | Subscribe to this feed Feed discovery Windows Update F12 developer tools | ÷ | pns. | Sign In Forgot your ID or |
| | | | | Fiddler OneNote Linked Notes Send to OneNote Internet options | - | _ | Register Now. |

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.

| Internet Options | e GO Secure Lo | ogin × | | Language Preference |
|---|--|--|--|--|
| Home page La | nguage Preference | ce | <u> </u> 2 | Language Preference |
| To create home page tabs, type each address on its own line. | ence s you use to read websites, lis add the ones you need, as so anate websites in other langu | sting in order of ome characters can iages. | Add the languages you use to read websites, listing in order of preference. Only add the ones you need, as some characters can be used to impersonate websites in other languages. Language: French (Canascia) (e-CA) English (United States) [en-US] | |
| Browsing history | English (United ! | States) [en-US] | Move up | Move down |
| Delete temporary files, history, cookies, saved passwords, and web form information. | | | Move down | Remove |
| Delete browsing history on exit | | | Remove | Add |
| Search Settings | Prefix and suff | Add Language | Add | Prefix and suffix options Do not add 'www' to the beginning of typed web addresses Specify the suffix for example, pet that should be added to |
| Change search deradits. Settings | Do not add | Language: | | typed web addresses when you press Ctrl + Shift + Enter. |
| Tabs Change how webpages are displayed in Settings | Specify the su typed web ad Suffix: | English [en] Estonian (Estonia) [et-EE] Estonian [et] Faroese (Faroe Islands) [fo | o-F0] | Suffix: |
| Appearance Colors Languages Fonts Accessibility OK Cancel Apply | _ | Filipino (Filippines) [fil-PH] Filipino (fil) Finnish (Finland) [fi-FI] Finnish (fil) Franch (Relaium) [fi-RE] French (Relaium) [fi-RE] French (Canada) (fi-CA) French (rrance) [fi-FK] | | - |
| | | French (Luxembourg) [fr-LL French (Monaco) [fr-MC] | 0] | |
| CONTACT US ACCESSIBILITY PRIVACY HELP | | User defined: | | ARIO, 2012 IMPORTANT NOTICES ENV ID: GDC SYSTEP LAST MODIFIED: 2014 |
| | | | ОК | Cancel |

3.5.3. Set Language in Planning

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

| Preferences | | × |
|---|---|---|
| *= | Application Settings Display Options Printi | ng Options User Varia <u>b</u> le Options |
| Conoral | E-mail Options | Use Applica <u>t</u> ion Default 🔲 📥 |
| General | E-mail Address | |
| | Task List Notification | No 💌 🗖 |
| Authentication | Approvals Notification | Yes 💌 🗖 |
| | Copy the Application Owner | No 🔽 |
| 2 H | Job Console Notification | Yes 💌 🗖 |
| Financial Reporting | Alias Setting | Use Application Default |
| | Alias Table | French 💌 📃 🚆 |
| | Approvals Options | Use Application Default |
| Web Analysis | Show Planning Units as Aliases | Yes 💌 🗖 |
| i da de la compañía d | Show Planning Units That are Not Started | No 💌 🗖 |
| Planning | Out of Office Assistant | I am currently out of the office. |
| | Select | Promote |
| | Select | |
| | Next | <automatic></automatic> |
| | Enter | |
| | Annotation | |
| | • III. | • |
| | | <u>S</u> ave <u>R</u> eset |
| | | |
| | | |
| Help | | <u>O</u> K Cancel |

4. Planning Navigation

4.1. Selecting an Application (Doc Set)

An application in EFIS 2.0 can be opened using one of the following methods:

1. Using the Menu Bar, select: select:

Navigate \rightarrow Applications \rightarrow Planning \rightarrow application name <u>OR</u> select, File \rightarrow Open \rightarrow Applications \rightarrow Planning \rightarrow application name

SCREENS



An alternative way to open applications in EFIS 2.0 is:

2. <u>Using the Home Page:</u> The application can be selected from either the **Recently Opened list** or the **Quick Links.**



Once you select the correct *Application* using one of the above methods, the *My Task List* will be displayed.

| ORACLE Enterprise Performance Man | agement System Workspace, Fusion Edition | | | | | Logged in as EFIS.TRAINE | R01@GMAIL.COM | Help Log | off |
|---|---|--------|--------|----------|-------|--------------------------|---------------|------------|-------|
| <u>N</u> avigate <u>Fi</u> le <u>E</u> dit <u>V</u> iew <mark>Favorites</mark> Tools <u>H</u> elp | | | | | | | | | |
| 🐔 😸 🍲 Explore j 🛒 📣 🖉 j 🖌 🚚 🕬 🦉 | | | | | | | | | |
| | | | | | | Search | | | Advar |
| HomePage P1415FSP | | | | | | | | | |
| E Forms | Task List Status | | | | | | | | - |
| My Task List | Task List Status - All | | | | | | | View | _ |
| Submission Input and Query Soumission Entrée | Task List Status - All | | | | | | | TICA | • |
| Submission Input and Query | | | | | | | | | |
| * P Soumission Entrée et requête | | | | | | | | | |
| Submission Management - Modifier, Gestion de la | | | | | | | | | |
| Submission Management | | mplete | | | | | | | |
| | | erdue | | | | | | | |
| des don de la sodifission | Incomplete 100 OF | | | | | | | | |
| | Track List Otation All | | | | | | | | |
| | Task List Status - All | | | | | | | | |
| | 1 | | | | | | | | |
| | Task List Tasks - All | | | | | | | | |
| | Task | Туре | Status | Due Date | Alert | Completed Date | Instructions | Action | |
| | Submission Input and Query_Soumission Entrée et requête | | G | | | | | | ^ |
| | Submission Input and Query | 6 | G | | | | | | = |
| | Input and Results | 0 | G | | | | | | |
| | 🞯 Data Elements | G | G | | | | | | |
| | in the second state of th | Ch. | G | | | | | | |
| | Geral Administration - Program Staff | G | G | | | | | | |
| | 6 Expenditures | G | G | | | | | | |
| < > | igentitlement | G | G | | | | | | |
| Preferences | E Errore and Warpings | í. | i î î | | | | | B | - |

4.2. EFIS 2.0 Task List

The **Task List** allows you to access all forms, reports and workflow activities that are available to your user type. The Task List has been organized for you to follow a suggested order of data input.

You can drill down into lower levels of the Task List to reveal additional detais and schedules.

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

SCREEN

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| omePage P1415FSP * | | | | | | Search | | |
| | | | | | | | | |
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| Submission Input and Query_Soumission Entrée e | | | | | | | | |
| Submission Input and Query | | | | | | | | |
| Soumission Entrée et requête | | | | | | | | |
| Submission Management - Modifier_Gestion de la | l Ir | complete | | | | | | |
| Submission Management | | omplete | | | | | | |
| Gestion de la soumission | | verque | | | | | | |
| | Incomplete, 100.0% | | | | | | | |
| | Task List Status - All | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Task List Tasks - All | | | | | | | |
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| | pinput and Results | | | | | | | |
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| | Administration - Program Staff | <u> </u> | | | | | | |
| | Si Administration - Program Stam | <u> </u> | o ت | | | | | |
| 4 III | A Entitlement | <u> </u> | | | | | | |
| references | Reference and Warnings | | ñ | | | | | |
| RACLE Enterprise Performance Mana ste Elle Edit View Favorites Tools Help | agement System Workspace, Fusion Edition | | | | Log <u>c</u> | ed in as EFIS.TRAINER01@ | gmail.com Heip | Log Off |
| mePage P1415F5P × | | | | | | Search | | Adv |
| For <u>m</u> s | Task List Status | | | | | | | |
| Task List | Task List Status - All | | | | | | 1 | View - |
| Submission Input and Query Soumission Entrée | | | | | | | | |
| Submission Input and Query | | | | | | | | |
| Input and Results | | | | | | | | |
| E PReports | | molete | | | | | | |
| Validation Formats | Com | plete | | | | | | |
| 🗉 🏴 Soumission Entrée et requête | Ove | rdue | | | | | | |
| Entrée et Résultats | Incomplete, 100.0% | | | | | | | |
| E PRapports | Task List Status - All | | | | | | | |
| 🗉 🏴 Formats de validation | | | | | | | | |
| Submission Management - Modifier_Gestion de la | | | | | | | | |
| 🗉 🏁 Submission Management | Task List Tasks - All | | | | | | | |
| Cartion de la coumicsion | Task | Туре | Status | Due Date | Alert | Completed Date Ins | tructions Ac | ction |

4.2.1. Expand and Collapse Task List

The Task List is organized into folders that contain cubes. To expand the folders, rightclick on afolder and select *Expand*. Alternatively,click 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.), click on the cube icon.

In the screenshot below, the right arrow points to an example of the folder lcon and the left arrow points to an example of the Cube lcon.

SCREEN

| | My Task <u>L</u> ist | | |
|---|--|--|---|
| | 🖃 芦 Submission Input and Query_Soumission Entrée et requête | | |
| | 🖃 🎾 Submission Input and Query | | |
| | | | |
| | Data Elements | | |
| | 🗄 🐨 Operational Support – Program Staff | | |
| | 🗄 🞯 Administration - Program Staff | | |
| | ⊕ Expenditures | | |
| | Entitlement | | |
| | Errors and Warnings | = | |
| | | | |
| | | | |
| Inscie Enterprise Performance Manage. | jsp System Workspace, Fusion Edition | ☆ 후 C M - Google Logged in as EFIS.TRAINER | P 1 |
| Dacké Enterprise Performance Manage4 | jyp System Workspace, Fusion Edition | ☆ 코 C 내용 - Google Logged in as EFIS.TRAINCR(Search | P 1 118/GMAIL.COM Help Log OFF ⊆ |
| brace Enterprise Performance Manage_ Attps://rest.efic.fma.cor.gov.on.cv/worktpsice/inde RACLEC_Enterprise Performance Hanagement pate Enterprise Performance Hanagement pate Enterprise Performance Hanagement pate Enterprise Paragement pate Enterprise Pate Streprise Pate St | ysp System Workspace, Fusion Edition | 같 후 안 실험 - Geogle Logged in as CPIS-TRAINCR(Search | ₽ 4 1180441COM Heb Log Off ⊆ € Advance |
| Dack Enterprise Performance Manage_ + | yep System Workspace, Fusion Edition | 같 = C 값 - Geogle Logged in as CFLS TRAINCR(Search | P 1 |
| Tack Enterprise Performance Manage | System Workspace, Fusion Edition Task List Status Task List Status Task List Status - Submission Input and Query_Soumission Entrée et requête | 같 또 C 내 실 - Google Logged in as ETIS TRANCH Search | P 1 1303MALLCOM Heb Log Off G 0 Advance |
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This is an example of right clicking on a folder and selecting *Expand All Below* will drill down the selected item to the next level.

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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.

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Example of selecting Collapse All

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4.3. How to Navigate in Planning using Task List

To expand any form in EFIS 2.0 Task List, click on the Expand icon [+] next to the desired Task List item. A list of folders/cubes for each area will be displayed. The 'Input and Results' folder contains all the data input forms. The 'Reports' folder contains reports for all Schedules and other EFIS2.0 reports. The 'Validation Formats' folder contains valid (allowable) data formats for all input forms. The 'Submission Management' folder contains all the tasks related to validation and promotion of your EFIS 2.0 submission.

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| ORACLE' Enterprise Performance Management System | ACLE' Enterprise Performance Hanagement System Workspace, Fusion Edition | | | | | Logged in as EFES.TRAINER01@GMAIL.COM Help Log Off Q | | | | | |
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4.3.1. Input and Results Data Navigation

All data input forms are contained in the 'Input and Results' folder. To access the individual forms, *expand* the 'Input and Results' folder.

| ORACLE Enterprise Performance Management System Workspace, Fusion Edition | | | | | | Logged in as EFIS.TRAINER01@GMAIL.COM Help Log Off | | | | |
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4.3.1.1. Errors and Warnings Navigation - Input

The Errors and Warnings have been separated into 2 input forms, one for errors and one for Warnings. The 'Warnings' form now includes a new field for Warning Explanations where you must enter an explanation for any warning messages that have a "Yes" value. (This replaces the additional excel report that was previously required.) A new Errors form prohibits the submission your file to the Ministry if there are any errors and/or if explanations have not been provided for your warnings.

Example of Warning Explanation Form

| ORACLE [®] Enterprise Performance Manag | gement System Workspace, Fusion Edit | ion | | | | | Logged in | as EFIS.TRAINER01@GMAIL.COM Help | Log Off Q |
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| Submission Input and Query_Soumission Entrée e | 🗉 Warnings | | | | | | | | |
| P Input and Results | Scenari | o: Financial Statements | | | | Period: YearTotal | 1 | WYear: 2014-15 | |
| Otata Elements | Algoma DSAB | ecipient Working Version | | | | | | | |
| 🗉 🞯 Operational Support – Program Staff | Warnings | | | | | | | | |
| 🗉 🞯 Administration - Program Staff | | | Value 1 | Value2 | Is Warning | Warning Explanation | | EW Description - English | |
| 🗉 🞯 Expenditures | A386 - Delivery Agent - Resource Centres | Warning_SC2.9_1 | 91,419 | 91,419 | No / Non | | For the following de though there is no a | tail code, there are expenses reported ev allocation for the specific program. | en |
| Strittement | A462 - Ontario Farly Years Centres | Warning SC2.9.1 | 40.000 | 40.000 | No / Non | | For the following de | tail code, there are expenses reported ev | en |
| Errors and warnings Warnings Warnings | Noz onano cany rears centres | Warning_SCETS_1 | 10,000 | 10,000 | no / non | | For the following de | tail code, there are expenses reported ev | en |
| Errors | A466 - Data Analysis Coordinators | Warning_SC2.9_1 | 68,000 | 68,000 | No / Non | | though there is no a For the following de | allocation for the specific program. | |
| 🗄 🞯 Program Locations | A525 - ECD Planning | Warning_SC2.9_1 | 11,900 | 17,800 | No / Non | | though there is no a | allocation for the specific program. | 211 |
| 🗄 芦 Reports | AF25 FCD Abariated | Waraina SC2.0.1 | 17 900 | 11,000 | No (Non | | For the following de | tail code, there are expenses reported ev | en |
| 🗉 芦 Validation Formats | A323 - LCD Aboriginal | warning_3c2.9_1 | 17,000 | 11,900 | No / Non | | ulougit there is no a | alocation for the specific program. | |
| 🗉 🎾 Soumission Entrée et requête | | | | | | | | | |
| 🖭 🏴 Submission Management - Modifier_Gestion de la | | | | | | | | | |
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The 'Error' form now has a new 'Recipient Accepted Error Confirmation' dropdown that allows submission with outstanding errors as part of the Submit with Errors process. This functionality can only be used after consulting with the Ministry

If an explanation for a warning has not been provided, an ERROR will be generated in the Error form.

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| E Input and Results | ▼ Re | cipient Working Version | | | | | | | |
| E Operational Support - Program Staff | Errors | | | | | | | | |
| ☑ Seperational Support = Program Staff | | | Value 1 | Value2 | Is Error | Board Accepts Erro | r EW Description - En | | |
| Expenditures | No Category | No SubCategory | | | No /Non | No / Non | Indicates if there is any | | <u>^</u> |
| Sentitlement | no category | no oubcategory | _ | | 110 / 11011 | 107101 | uncre to drift | | |
| Errors and Warnings | | • | _ | | | | Tatal | | |
| 🕀 🤍 Warnings | No Category | Error_SC2.9_1 | 0 | 22,912 | No / Non | | Administration | | E |
| E Program Locations | A386 - Delivery Agent - Resource Centres | Error SC2.9.2 | 0 | 0 | No /Non | | For the following | | |
| P Reports | | | - | | , | | For the following | | |
| 🗉 📁 Validation Formats | A387 - Resource Centres - First Nation | Error_SC2.9_2 | 0 | 0 | No / Non | | detail code, | | |
| 🗉 🏁 Soumission Entrée et requête | A462 - Ontario Early Years Centres | Error_SC2.9_2 | 0 | 0 | No / Non | | detail code, | | |
| 🗷 🏴 Submission Management - Modifier_Gestion de la | A466 - Data Analysis Coordinators | Error SC2.9 2 | 0 | 0 | No / Non | | For the following detail code. | | |
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Tips

To view the full description of the Error or Warning, click and hold the bottom-right triangle of the cell, and drag the cell down to expand.

Rob N to enter screen shot

4.3.2. Reports Data Navigation

Reports that display your input and results for each form are found under the *Reports* folder. Reports have been grouped by Schedules and Errors and Warnings. To print a complete set of reports, select the Report Book folder.

Example of the Report Area folders

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Each of the input cells requires valid (allowable) data formats to be entered before the data can be saved to the system; the *Validation Formats* folder contains validation forms for each input form.

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| Operational Support - Program Staff Number by Data Eleme | Visits Made by Parents and Caregivers | +0 | +0 | A |
| ■ Image: State | Children Served | +0 | + 0 | |
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| | Referrals | + 0 | + 0 | |
| | Protocols and Official Linkages | + 0 | + 0 | +0 |
| | Parents and Caregivers in Workshops and Seminars | + 0 | + 0 | |
| | Hours of Training, Workshops, Media Events or Conferences | | | +0.00 |
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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 |

| Description | Format Code |
|-------------------------|--------------|
| 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 |

4.3.3. Submission Management Navigation

The **Submission Management** folder includes tasks that are used to perform Version Management and Promotion activities (to promote the Recipient Working Version to the Recipient Active Version). The **Version Description and Summary** form allows you to enter a description for the version you are currently working on, as well as keep track of the activities on different versions in the application.

Example of the Version Description and Summary form

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| | V10D04:Recipient Draft 4 | | | | - | • | III | • | | |
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5. Data Input

5.1. Data Input and Results – 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 with cells for data input.

- White Cells are data input (you are allowed to enter data into these cells)
- Grey Cells are non-input cells (you are not allowed to enter data into these cells)
- 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 name of the form.

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| Data Elements | Data Elements | | | | | | |
| Operational Support – Program Staff | | | | | Financial Statements | | |
| | | | A386 - Delivery Agent - Res | ource Centres | A462 - Ontario Early Years Centres | A466 - Data Analysis Coordinators | |
| 🗉 🞯 Entitlement | Number by Data Elements | Visits Made by Parents and Caregivers | | 234 | 3,444 | | - All |
| Errors and Warnings | | Children Served | | 200 | 333 | | |
| 🕀 🞯 Program Locations | | Visits Made by Children | | 100 | 33 | | |
| 🕀 🏁 Reports | | Parents and Caregivers Served | | 234 | 3,333 | | |
| 🗉 芦 Validation Formats | | Families Served | | | | | E |
| 🗈 🏁 Soumission Entrée et requête | | Professionals in Workshops and Seminars | | 2,345 | 3,434 | 333 | |
| 🗉 芦 Submission Management - Modifier_Gestion de la | | Referrals | | 33 | 3,435 | | |
| | | Protocols and Official Linkages | | 456 | 55 | 334 | |
| | | Parents and Caregivers in Workshops and Seminars | | 2,345 | 4,455 | | |
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EFIS 2.0 displays the form for the task on the right side of the screen.

5.1.2. Enable Input Field

Input fields have a white background. To enable (or activate) an input field for input, click in the cell.

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| | | Protocols and Official Linkages Parents and Caregivers in Workshops and Seminars | • | 456 2,345 | 55 4,455 | 334 |
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To move between cells, you can use your mouse or the following keys on your keyboard:

- Tab to move horizontally from the selected cell over to the next cell
- Shift + Tab to move backwards horizontally from the selected cell to the previous cell
- Enter to move to the cell below the selected cell
- Shift + Enter to move to the cell above the selected cell

5.1.3. Key in Input Field

Once an input field is enabled (by clicking in the cell), you can enter a value into the cell. A dialog box will pop-upto show the description of the row and column.

Example of an input field that is enabled with a pop-up description:

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| Operational Support - Program Staff | Data Elements | | | | |
| 🕀 🞯 Administration - Program Staff | | | | Financial Statements | |
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| III 🥯 Entitlement | Number by Data Elements | Visits Made by Parents and Caregivers | 234 | Financial Statements A386 - Delive | ry Agent - Resource Centres |
| 🗄 🎾 Errors and Warnings | | Children Served | 200 | 333 | |
| 🕀 🞯 Program Locations | | Visits Made by Children | 100 | 33 | E |
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After you enter data into a cell and move to another cell, the system will highlight the cell in yellow. The cells are highlighted in yellow to help you keep track of the data you have entered and/or changed.

Once you save the form, the highlights will be removed. Example of a cell highlighted in yellow:

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| Expenditures | | | A386 - Delivery Agent - Resource | Centres A462 - Ontario Ear | ly Years Centres A466 | - Data Analysis Coordinators |
| | Number by Data Elements | Visits Made by Parents and Caregivers | | 234 | 3,444 | ^ |
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| 🗄 🞯 Program Locations | | Visits Made by Children | | 20 | 33 | |
| 🗄 芦 Reports | | Parents and Caregivers Served | | 234 | 3,333 | |
| 🖽 芦 Validation Formats | | Families Served | | | | |
| | | Professionals in Workshops and Seminars | | 2,345 | 3,434 | 333 |
| 🗄 芦 Submission Management - Modifier_Gestion de la | | Referrals | | 33 | 3,435 | |
| | | Protocols and Official Linkages | | 456 | 55 | 334 |
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5.1.4. Save input field

To save the data you have entered into an input field, click on the Save icon or $File \rightarrow Save$

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After you save the form, the system will confirm that the data has been saved.

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Click on **OK** to continue.

5.1.5. Invalid Data

When you enter and save data that is invalid (not accepted by the system), the cell will be highlighted in red and a Data Validation Message will be displayed on the right side of the form.

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To see the Validation Error message, click on Data Validation Message bar to display the error message.

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The Data Validation Message will describe the type of error and will provide you with a link that will take you directly to the cell that contains the error.

In order to correct the error, enter the correct value and save the data. After you have saved the data, you will get a confirmation message saying that the data has been

saved successfully. Once all the errors on the form have been corrected, the Data Validation Message will disappear from the the right side of the form.

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If you are not sure what the cell format should be, expand the *Validation Formats* folder and open the same form to see the description for each cell.

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| 🖃 🎾 Validation Formats | | Professionals in Workshops and Seminars | +0 | +0 | +0 | | |
| 🗄 🎯 Data Elements | | Referrals | +0 | +0 | | | |
| 🗉 🞯 Operational Support – Program Sta | | Protocols and Official Linkages | +0 | +0 | +0 | | |
| 🗉 🞯 Administration - Program Staff | | Parents and Caregivers in Workshops and Seminars | +0 | +0 | | | |
| Expenditures | | Hours of Training Workshops, Media Events or Conferen | cec | | +0.00 | | |
| 🗉 🕮 Soumission Entrée et requête 🔹 🔻 | | | | m | | | |
| <► | | | | | | | |
| Preferences | | | Complete | Previous Incomplete Previous | Next Incomplete Next Task List Home | | |

If you enter a non-numeric value into a cell that only accepts numeric values, you will get an error message and will not be able to navigate away from that cell until it is corrected.

| Oracle Enterprise Performance Management System | em Workspace, Fusion Editio | on - Mozilla Firefox | - manifest The | | - | | |
|--|-----------------------------|--|------------------------------|---------------|---------------------------|--------------------|--------------------------|
| Eile Edit View History Bookmarks Tools Hel | p | | | | | | |
| Oracle Enterprise Performance Manage + | | | 1 | | | | da more |
| A https://test.efis.fma.csc.gov.on.ca/workspa | ace/index.jsp | | | | 🚖 ⊽ C 🚼 - Googl | e | م |
| ORACLE Enterprise Performance Mana | gement System Workspac | ce, Fusion Edition | | | Logged in as EFIS | .TRAINER01@GM | AIL.COM Help Log Off |
| Navigate Eile Edit View Favorites Tools Help | | | | | | | |
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| HomePage P1415FSP - Task List Status × | | | | | Sei | arch | 🕑 Adva |
| - | | | | | | | |
| For <u>m</u> s | Task List Status | | | | | | |
| My Task List | Task - Data Elements-L | Data Elements - Input Task Instructions | | | | | |
| 🖃 🏴 Submission Input and Query_Soumission Entrée e | FSP - Data Elements - In | put | | | | | |
| E P Submission Input and Query | | Period: YearTotal 1 | | | WYear: 2 | 014-15 | |
| Input and Results | | Recipient Working Version | | | | | |
| Data Elements | Data Elements | | | | @ - | | |
| E Operational Support – Program Staff | | | | | You have entered an inv | valid value. Pleas | e try again. |
| E Second three | | | A386 - Delivery Agent - Reso | ource Centres | Row Number by Data Eleme | nts Children Serv | ed. Column |
| | Number by Data Elements | Visits Made by Parents and Caregivers | | 234 | Financial Statements A386 | - Delivery Agent - | Resource Centres |
| Errors and Warnings | • | Children Served | wwww | | | 333 | |
| Program Locations | | Visits Made by Children | | 20 | | 33 | |
| 🗉 🏁 Reports | | Parents and Caregivers Served | | 234 | | 3,333 | E |
| 🗉 芦 Validation Formats | | Families Served | | | | | |
| 🗉 芦 Soumission Entrée et requête | | Professionals in Workshops and Seminars | | 2,345 | 3 | 3,434 | 333 |
| 🗉 뛛 Submission Management - Modifier_Gestion de la | | Referrals | | 33 | | 3,435 | |
| | | Protocols and Official Linkages | | 456 | | 55 | 334 |
| | | Parents and Caregivers in Workshops and Seminars | | 2,345 | | 4,455 | * |
| | | | • | | | | |
| × | | | Complete | Previous In | complete Previous N | levt Incomplete | Next Task List Home |
| | | | | Flevious Ir | icomplete Previous IN | Excancomplete | Mext Idsk List home |

5.2. Reports

Reports provide you with the results of each form in a report format. Users can access individual reports or a Report Book that includes all reports.

| ORACLE Enterprise Performance Manag | jement System Workspace, F | Fusion Edition | | | | Logged in as El | IS.TRAINER01@GN | IAIL.COM H | lelp Log Off 🤉 |
|---|---|-------------------|--|----------|--------------------|-----------------|-----------------|--------------|-----------------------|
| Navigate Elle Edit ⊻iew Favorites Tools Help | | | | | | | | | |
| 🏠 🚰 🍲 Explore j 🖉 🛷 🕮 j 🖌 📲 🛍 | | | | | | | | | |
| HomePage P1415FSP - Task List Status * | | | | | | | Search | | Advance |
| ⊎ For <u>m</u> s | Task List Status | | | | | | | | |
| My Task List | Task - Input and Results | Task Instructions | | | | | | | |
| Submission Input and Query_Soumission I Submission Input and Query Submission Input and Research Sub | Status Incomplet Completed Date Complete No Due Date | ie - | | | | | | | |
| Preferences | | | | Complete | revious Incomplete | Previous | Next Incomplete | Next T | ask List <u>H</u> ome |

Tips

In order to simplify the reports process, you need to perform a simple one-time Preference set-up at the start of each new reporting cycle. Please refer to Section 3.1 for detailed instructions.

5.2.1. Running a Report

To run a report, select Reports from the Task List.



The **Preview User Point of View (POV)** screen will be displayed. The first time that reports are generated at the start of a reporting cycle, you must select a **Version** and the **Recipient** name. (Version: Recipient Working Version, Recipient: *The name of your First Nation*) This will become the default setting until you change the Version.

If an <u>error message</u> is displayed prior to the Point of View (POV) screen, check that the settings in <u>Section 3.1</u> have been applied.

| This report/book will | run for the members on the us | er point of view listed |
|-----------------------|-------------------------------|-------------------------|
| Version | | |
| Version | Select | |
| Recipient | | |
| Recipient | Select | |
| Edit Member Na | mes | |
| | | |
| | | |
| | | |
| | | |
| Help | | OK Cancel |

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

Though the correct version may already be selected, we suggest unclicking the button and re-selecting the version to ensure that the EFIS registers the correct version.

| eview User Point of View | | |
|---------------------------------------|---------------------------------------|---|
| Find: Name 💌 * | 🖬 🔍 Use Wildcards | |
| 🞯 🗏 🗐 Rows Per Page: 20 | | |
| Name | Default | |
| 🖃 📴 Version | | |
| 🕂 🗁 🔘 Submission Versions | | |
| <u> </u> | | - |
| | Recipient Working Version | |
| ₩ V10D01 | Recipient Draft 1 | |
| | Recipient Draft 2 | |
| ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ ₩ | Recipient Draft 3 | |
| | Recipient Draft 4 | |
| | Recipient Draft 5 | |
| | Recipient Draft 6 | |
| | Blank Template For Reset | |
| | Recipient FA Viewable Version | |
| | Recipient FA Viewable Draft Version 1 | |
| ₩ ₩ 10FOVD02 | Recipient FA Viewable Draft Version 2 | |
| | Recipient FA Viewable Draft Version 3 | |
| | | |

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

| Pre | view User Point of View | | |
|-----|-------------------------------------|-------------|-------------|
| | | | |
| | Members | | |
| | Available: Recipient (1-20 of 51) 🔊 | | |
| | Find: Name 💌 * | 64 | V U: |
| | 🚰 💾 🗐 Rows Per Page: 20 💌 | | |
| | Name | Default | |
| | 🗆 📄 🦳 Recipient | | |
| | 戸 🞾 🔘 Total Recipients | | |
| | | Algoma DSAB | |

Once you have made the correct "**Point of View**" selections, click *OK* to run the report.

| Preview User Point of V | ïew | × |
|---|--|---|
| This report/book will run for t below. | the members on the user point of view listed | |
| Version | | |
| Recipient Working Version | Select | |
| Recipient | | |
| Algoma DSAB | Select | |
| Edit Member Names | | |
| Help | <u>O</u> K <u>C</u> ancel | |

The report will generate in PDF format. You can view, save the file as a PDF or print the report. The headings on the report will tell you:

- what report you have generated
- the version you are in
- the fiscal reporting year and
- the reporting cycle

to change screen shot below to reflect a First Nation report

Submission Version: Recipient Working Version Recipient Name: Year: 2014-15 Cycle: Financial Statements

×

Cancel

Family Support Programs - Data Elements - Total

| | A386 - Delivery Agent - Resource Centres | A462 - Ontario Early Years Centres | A466 - Data Analysis Coordinators |
|---|--|------------------------------------|-----------------------------------|
| | | | |
| Visits Made by Parents and Caregivers | 234.0 | 3,444.0 | |
| Children Served | 200.0 | 333.0 | |
| Visits Made by Children | 20.0 | 33.0 | |
| Parents and Caregivers Served | 234.0 | 3,333.0 | |
| Families Served | | | |
| Professionals in Workshops and Seminars | 2,345.0 | 3,434.0 | 333.0 |
| Referrals | 33.0 | 3,435.0 | |
| Protocols and Official Linkages | 456.0 | 55.0 | 334.0 |
| Parents and Caregivers in Workshops and Seminars | 2,345.0 | 4,455.0 | |
| Hours of Training, Workshops, Media Events or Conferences | | | 334.0 |
| Hours of Direct Service | | | |
| Programs FTEs | | | |
| | | | |

Error executing query: You are trying to open the form, but cannot because one of the required dimensions is not present in the Page. Possible causes may be that you do not have access to at least one member of a required dimension, or the member selection resulted in no members present. Contact your administrator. Dimension(Version) com.hyperion.planning.NotEnoughAccessException

Tips

POntario

If you get the error message above, check that both the Version and Recipient have been selected.

To change the Version selection without generating the report again, 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**. The report will refresh with the new data.

| HomePage MCCTEST - Task List Status Schedule 1 1 5A * | | - |
|---|----------------------------------|---|
| | Preview User Point of View | 1 |
| Version: Recipient Working Version Recipient: Algoma DSAB | Available: Version (1-20 of 32) | |
| | Find: Name 💌 * 🚧 🗹 Use Wildcards | |
| | 🟱 🚰 🚽 Rows Per Page: 20 💌 | |
| | Name Default | |
| | E-B Version | |
| | 🛱 🚰 🛇 Submission Versions | |
| | 🕂 🔁 🔍 Recipient Versions | |
| | V10W Recipient Working Version | |
| | V10D01 Recipient Draft 1 | |
| | N10D02 Recipient Draft 2 | |
| | V10D03 Recipient Draft 3 | |
| | V10D04 Recipient Draft 4 | |
| | 🗉 🗄 📖 🔊 🕜 Recipient Draft 5 | |

5.2.2. Generating Report Books

To generate a complete set of reports for all forms, select **Reports** \rightarrow **Report Book**



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

to change screen shot to reflect First Nation user

| Preview User Point of \ | liew | × |
|---|--|---|
| This report/book will run for below. | the members on the user point of view listed | |
| Database Connection | | |
| MCCTEST_Planning_Main | ~ | |
| Version | | |
| Recipient Working Version | Select | |
| Recipient | | |
| Algoma DSAB | Select | |
| Edit Member Names | | |
| Help | OK Cancel | 1 |

Tips

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 book will generate a Table of Contents in a new tab. You can open a single report by double- clicking the report ICON (\blacksquare) to the left of the report.

Alternatively, you can open <u>all the reports</u> in your submission by selecting *File* \rightarrow *Open In* \rightarrow *Complete Book in PDF*, in the upper tool bar.

| () Oracle Enterprise Performance Management System Wo | rkspace, Fusion Edition - Mozilla Firefox | Picket Internet | and the second se | |
|---|---|------------------|---|------------------------|
| File Edit View History Bookmarks Tools Help | | | | |
| Oracle Enterprise Performance Manage + | a grow grow grow it | 10 m (2 m 1 | - Annual - | |
| + https://test.efis.fma.csc.gov.on.ca/workspace/ind | lex.jsp | | r 🗟 🚼 = Google | ۸ م |
| | nt System Workspace, Fusion Edition | | Logged in as EFIS.TRAINER01@GMAIL.C | COM Help Log Off 으 |
| Navigate File View Favorites Tools Help | | | | |
| 🔥 😆 Open 🔸 🚲 | | | | |
| Open In 🔸 🚽 HTML Preview | | | | |
| Home Close PDE Preview | pport Programs Submission - Financial Statements - View * | | Search | Advanced |
| /P1415 Save As Complete Book in PDF | nancial Statements | | | |
| Vers Preferences 190003 | | | | < > |
| Log Off | | | | |
| Egit | | | | Show Report |
| Book Table of Contents: 2015 Family Support Programs St | ubmission - Financial Statements | | | |
| Name | | Member Selection | Report Location | |
| Family Support Programs – Data Elements | | | /P1415FSP/Common/EN | |
| Family Support Programs – Operational Support – Pr | rogram Staff | | /P1415FSP/Common/EN | |
| Family Support Programs – Administration – Program | n Staff | | /P1415FSP/Common/EN | |
| Family Support Programs – Adjusted Gross Expendit | tures | | /P1415FSP/Common/EN | |
| Family Support Programs – Entitlement | | | /P1415FSP/Common/EN | |
| Errors | | | /P1415FSP/Common/EN | |
| Warnings | | | /P1415FSP/Common/EN | |
| Location Schedule | | | /P1415FSP/Common/EN | |
| | | | | |

The full report will be generated as a PDF document with an interactive Table of Contents. Click on any of the reports listed in the table of contents to open that particular report.

To change screen shot to reflect First Nation User



5.2.3. Opening a report in Excel

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



Select Open with or Save

| Opening Schedule 3_0. | xls | | | | | |
|--|---|--|--|--|--|--|
| You have chosen to | open: | | | | | |
| Schedule 3_0.xls | | | | | | |
| which is a: Mi | crosoft Excel Comma Separated Values File | | | | | |
| from: https://t | est.efis.fma.csc.gov.on.ca | | | | | |
| What should Firefor | do with this file? | | | | | |
| ◎ <u>O</u> pen with | Microsoft Excel (default) | | | | | |
| Save File | | | | | | |
| Do this <u>a</u> utomatically for files like this from now on. | | | | | | |
| | OK Cancel | | | | | |

The PDF report will be exported to Excel where all the normal excel functionalities can be used.



Submission Version: Recipient Working Version Recipient Name: Algoma DSAB Year: 2014 Cycle: Revised Estimates

Schedule 3.0 - Allocations for Operating and Other Purposes

| 12 | Page.Recipient working version, Algoria DSAb | |
|----------------------|---|------------|
| 13 | | Allocation |
| 14 | Core Service Delivery Operating Allocations | |
| 15 1.1 | Core Services Delivery 100% | 0 |
| 16 1.2 | Core Services Delivery - Cost Share Requirement 80:20 | 1,416,942 |
| 17 1.3 | Core Services Delivery - Cost Share Requirement 50:50 | 194,388 |
| 18 | | |
| 19 | Total Operating Sectors for Allocation Excluding TWOMO (100% Provincial Contribution) | |
| 20 2.1 | Language | 110,450 |
| 21 2.2 | Aboriginal | 6,252 |
| 22 <mark>2</mark> .3 | Cost of Living | 55,181 |
| 23 2.4 | Rural and Remote | 1,787,509 |
| 24 2.5 | FDK transition | 89,644 |
| 25 2.6 | Transformation | 11,884 |
| 26 2.7 | Capacity Building | 11,785 |
| 27 2.8 | Small Water Works | 4,125 |
| 28 2.9 | Repairs and Maintenance | 4,872 |
| 29 2.10 | Utilization Adjustment | 312,702 |
| 30 2.11 | Capping Adjustment | -55,226 |
| 31 | | |
| 32 3 | Total Operating Sectors for Allocation Excluding TWOMO | 3,950,508 |
| 33 | | |
| 34 | Total Capital Sectors for Allocation | |
| 35 4.1 | Capital Retrofits | 15,178 |
| 36 | | |
| 37 5 | Total Sectors for Allocation Excluding TWOMO | 3,965,686 |
| 38 | | |
| 39 6.1 | TWOMO | 120,039 |
| 40 | Total Sectors for Allocation | 4 085 725 |
| 42 | | 1,000,120 |

6. Submission Management

6.1. Overview of Versions

Submission Management allows you (the "Recipient") to manage the versions or submissions that you are working on. The tools provided in EFIS 2.0 give you the ability to copy data between versions and ultimately to promote the Recipient Working Version for approval (using the Workflow / Approvals Management process).

| Desistent Marsia | | | |
|------------------|-------------------------------|--|--|
| Recipient Versio | ns | | |
| V10W | Recipient Working Version *** | This version allows the Recipient 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 written or copied to | Versions Recipient User can write to |
| V10FOV | Recipient FA Viewable Version | Version for review by FA. The FA does not have access to view Recipient Working Version. If a Recipient User needs the FA to review the data in that version for any reason, they would copy the data into "FA Viewable Version". This allows for the FA to review and give feedback to the Recipient User. | |
| V10 | Recipient Active Version | The final version which is submitted to the Ministry. Once the Recipient User promotes the Recipient Working Version, an approver is responsible for approving the data and promoting it to the Recipient Active Version. | |
| V10I01 | Recipient Inactive Version 1 | | |
| V10I02 | Recipient Inactive Version 2 | | |
| V10I03 | Recipient Inactive Version 3 | | Versions |
| V10I04 | Recipient Inactive Version 4 | | Versions Decinient Lloor |
| V10I05 | Recipient Inactive Version 5 | Versions used as a historical / audit record of previously active versions. | con road from |
| V10I06 | Recipient Inactive Version 6 | | canreaution |
| V10I07 | Recipient Inactive Version 7 | | |
| V10I08 | Recipient Inactive Version 8 | | |
| V10109 | Recipient Inactive Version 9 | | |
| FA Versions | | | |
| V20 | FA Active Version | The final version which is submitted by the Ministry for payout purposes. | |

verify versions - still only FA viewable???

6.1.1. Copy Data from Working Version to FA Viewable Version

This functionality allows you to copy your current data into a file where your Financial Analyst will have the ability to go into the file to assist you with any issues you may be encountering. Please note that your Financial Analyst will **not** be able to change any of your data. He/She will simply be able to look at your entered data and guide you along to help you resolve your problem. You will then have to go back into your Working Version to make any necessary changes.

These are the steps to copying your data from Working Version to FA Viewable:

 Under My Task List, open the following task: Submission Management – Modifier → Submission Management → Copy Data to Recipient FA Viewable Version

| HomePage TRAINFSP - Task List Status * | | |
|--|---|-------------------|
| | | |
| € For <u>m</u> s | Task List Status | |
| My Task List | Task - Copy Data to Recipient FA Viewable Version-COPY_V10FOV Task 1 | Instructions |
| ➡ ■ Submission Input and Query_Soumission Entrée et requête ➡ ■ Submission Management - Modifier_Gestion de la soumission - Modificateur | WearTotal1 Wear: 2014-15 WearScenario: Final Trainer Recipient ▼ ● | ancial Statements |
| Submission Management Submission Description and Summary Soft Copy Data to Recipient FA Viewable Version Soft Flag Submission for Approval Soft Validate and Promote for Approval Soft Section de la soumission | THIS PROCESS WILL REPLACE ALL DATA IN 'Recipient FA Viewable Version' WITH DATA FROM 'Recipient Working Version'. PLEASE CONFIRM . CE PROCESSUS VA REMPLACER TOUTES LES DONNÉES dans la Version visible par AF AVEC LES DONNÉES de Version de travail de la destinataire. VEUILLEZ LE CONFIRMER . Are you sure you want to replace all data in FA Viewable Version? | No Category |
| | Latest copy date | 2015/05/15 |

Click on the red cell beside "Are you sure you want to replace all data in FA Viewable Version?"

- 2. and select "Yes/Oui" from the drop-down
- 3. Click the Save button
- 4. A new window will pop up stating that the calculation is in progress



5. When the process completes the following message will appear



6. The "Latest Copy Date" cell will be updated with today's date

| ···· / ··· · / ···· · · · · · · · | |
|-----------------------------------|------------|
| Latest copy date | 2015/05/15 |
| | |

6.2.1. Version Description and Summary Dashboard in the task list

The **Version Description and Summary – Submission Dashboard** allows you to keep track of the versions you are working with. It is a place that allows you to see the current status of your submission (whether it is active or not) and allows you to add descriptions to each of the Draft versions available. This way, you can know where your data is currently stored/saved 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.

| ORACLE Enterprise Performance Management System Wo | rkspace, Fusion Edition | | | | Logged in as EFIS.TRAINER | R01@GMAIL.COM H | lelp Log Off |
|--|---|-----------------------------|--|---|---------------------------|-----------------------|-----------------------|
| Navigate Ele Edt View Favorites Iools Help 🔺 💕 🏕 Explore 🗒 🕫 🚄 📝 👫 | 41 | | | | | | |
| HomePage P1415FSP - Task List Status × | | | | | Search | | 🕖 Advar |
| | | | | | | | |
| Forms | Task List Status | | | | | | |
| My Task List | Task - Version Description and Summary-Submission | Dashboard Task Instructions | | | | | |
| a) ■ Submission Tuput and Query_Soumission Entrée et requête E ■ Submission Input and Query B ■ Pruput and Results B ■ Reports | Submission Status | Period: YearTotal1 | Year: 2014-15 | Sategory: No Category | 9. SubCat | egory: No SubCatego | ry |
| B Valdaton Formats B Valdaton Formats B Submission Enrice at requise Submission Management - Modifier_Gestion de la soumission - Modif B <u>Submission Management</u> B <u>Valdaton Beerription and Summary</u> Rig Submission for Approval R <u>Valdates and Promote for Approval R <u>Valdates and Promote for Approval R Valdates and Promote for Approval B <u>Valdates and Promote for Approval B Valdates and Promote for Approval B <u>Valdates and Promote for Approval B Valdates and Promote for Approval B <u>Valdates and Promote for Approval B Valdates and Promote for Approval B <u>Valdates and Promote for Approval B Valdates and Promote</u></u></u></u></u></u> | V2D/Racipient Active Version Not Active/Inactif V2D/FA Active Version Not Active/Inactif | | | | | | |
| | Version Description and Summary | | | | | | |
| | Version De Add Comments here 200V:Recipient Working Version 20:FA Active Version | | V108Rc0;Rec() V10.Rec() V1003Rec() V1003Rec() V1003Rec() V1003Rec() V1003Rec() V1003Rec() V1007Rec() V1007Rec() | Hert Error Override Version Active Version and Inactive Version 1 ent Inactive Version 2 ent Inactive Version 3 ent Inactive Version 4 ent Inactive Version 5 ent Inactive Version 6 ent Inactive Version 7 | Activation Date | Version Description | E |
| | | | V10108:Recipi | ent Inactive Version 8 | | | - |
| Preferences | | | | Complete Previous Incomplet | e Previous Next Inco | mplete <u>N</u> ext T | ask List <u>H</u> ome |

6.2. Approvals Process – Modifier

The Submission Management task list is used to manage sign-off and approvals as you complete the cycle. Once your submission is ready for approval, there are a number of steps to promote the submission.

The first requirement is that all the data that must be submitted must be in "Recipient Working Version". This is the only version that can be promoted to the approvals process which starts off with the Validation of the file.

When all the data in the Recipient Working Version is ready, it is recommended that you first review and address any Errors and Warnings and Input Validation errors prior to beginning the Sign-off and Approvals process.

The file validation is initiated and completed by running the following steps:

6.2.1. Flag Submission for Approval

Select **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 and click the **Save** button.

It is very important to note that each time a change is made to your submission after you have already "flagged" the submission for approval for example you corrected invalid data, the flag must be re- flagged. This ensures that the most recent data is being validated.



6.2.2. Validate Submission

This process validates your entire file prior to submission. It is here that **all** remaining errors and warnings, which were not addressed earlier, will be captured and highlighted for you to go and correct.

If there are any errors found in your submission, you will not be able to submit your file to the Ministry. To validate your submission:

Select Submission Management and open the Validate and Promote for Approval task



Select your Recipient name shown under **Planning unit** and click on **Actions** \rightarrow **Validate**

| Homeson P1415FSP - Task List Status * | | Search | |
|---|--|--|--|
| | | | |
| fi Forms | Task List Status | | |
| ly Task List | Task - Validate and Promote for Approval-Manage Approvals Task Instructions | | |
| Submission Input and Query_Sourceson Entries et requite Entries Touristics Touristics Council | Scenario Financial Statements 💓 Version Recipient Working Version 💓 | | Qut of Office Aud |
| at P Input and Results | 🚦 Process Status | | Vev |
| 🔊 🌌 Reports | Chart Type Pie 🐷 Group By | | |
| E Validation Formats | | | |
| E P Sourission Entrée et requite | | | |
| Submission Management - Modifier_Gestion de la soumission - Modifi | | | |
| * Venion Description and Summary | | | |
| R 🎯 Pag Submission for Approval | | 140 | |
| T 😌 Validate and Promote for Approval | | | |
| R B Gestion de la soumission | | | |
| | Actions + Verr + D 12 1 D 2 10 P Detach | | |
| | Disease link | A Y Approvals Status Y Sub-Status Y Current Owner Y Location | V Path Detail |
| | DSAB | Not Signed Off MCC_M90003W 3SA8 | 2 |
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| racle Enterprise Performance Manage 4 | | | - |
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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**.

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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..

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Selecting the error task in the Task list will take you 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 Schedule 2.3. The user must navigate to Schedule 2.3 to remove the error.

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

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

NOTE: To continue on with the submission process, after any errors or warnings have been corrected, you **must re-set** the *Flag Submission for Approval* to **Yes**.

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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*.

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6.2.3. Promote Submission

To promote the submission to the Recipient Approver, select **Submission Management** \rightarrow **Validate and Promote for Approval**, and select your Recipient name under the Planning Unit.

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Once the Recipient name under the Planning Unit is selected, select Actions \rightarrow Change Status.

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The Change Status screen will appear. Select **Promote** from the **Select Action** list.

"Select **Next Owner**" will be pre-populated with <u>Automatic</u> and should remain as is. Enter comments, if required, then click **OK**

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The submission will be promoted to your Approver and the Recipient Working Version will now be changed to a "Read Only" file, that is, you will not longer be able to make any changes to the file.

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Please note that if you attempt to promote a submission when there are validation errors, the Sub- Status will be displayed as *Failed: Invalid Data.* You will be required to correct the validation errors and then re-do the Promote process.

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6.3. Manage Approvals – Approver

Once a submission has been promoted by the Modifier, the 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:

1. Continue on with the sign-off process of the submission or

2. Reject the submission

If the Approver decides to reject the submission, the submission returns back to the Modifier to make any necessary adjustments.

If the Approver continues with the sign-off process and approves of the file, the data is automatically copied from the Recipient Working Version to the Recipient Active Version.

At this point, you have officially submitted your EFIS file to the Ministry and the status of the submission is changed to "Active". Your Financial Analyt will then start the review process.

6.3.1. Approve and Sign-off

Select Submission Management \rightarrow Recipient 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.

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

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6.3.2. Reject and return submission to the Modifier

If the Approver decides that the submission is not acceptable and not ready for sign-off, the approver can return the submission to the Modifier.

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

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Once the Recipient name under Planning Unit is selected, select Actions
Change Status.

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The Change Status screen will appear, select Reject from the Select Action list.

Select Next Owner should be populated with **Automatic**. If necessary, enter comments, then select **OK**.

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The Approvals status will change to Not Signed Off.

The Owner will revert back to the Modifier and the Recipient Working Version will no longer be read- only, so changes can be made.



6.3.3. Submission with Error Override

Under special circumstances a Recipient may need to promote a Submission that contains errors. In these rare instances, the Modifier in the Errors Tab, will set the **Recipients Accepts Error Flag** to **Yes** then follow the normal submission process. In this case, the data is automatically copied from the Recipients Working Version into the Recipients 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 Recipients 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 Recipients Error Override into Recipients Active Version and FA 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 → Errors and Warnings Error → Errors and Warnings select Yes from the Recipient Accepts Error drop down list and click Save

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Modifier follows the normal Promotion process.

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

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The Approver follows the normal sign-off process

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

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The Recipient must contact the Ministry to request the over-ride approval.

6.3.4. Checking the Submission History

In this section you will be able to view the your submission's history. Select: **Validate and Promote for Approval** and click the **Details** button.

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