I+IT Community Services Cluster

Ontario

Ministry of Municipal Affairs and Housing

Financial Information Return (FIR) User Registration Instructions (External Users)

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Document History

Document History			
Version	**Date**	**Changed by**	**Description of changes**
0.1	January 2016	Al McLaren	Initial Draft
0.2	April 2016	Al McLaren	Updated to include Registry changes
0.3	April 2016	Al McLaren	Updated Registry Changes
0.4	September 2016	Al McLaren	Updated for new registration App
0.5	October 2016	Al McLaren	Update with system requirements
0.6	November 2016	Al McLaren	Update .NET Framework install
0.7	November 2016	Al McLaren	Updated Smart View disable for office
1.0	November 2016	Al McLaren	Final updates
1.1	January 2017	Al McLaren	Add for EFIS User
2.0	January 2022	Sue Martin	Smart View Version 21.100 and general updates.
2.1	February 2023	Sue Martin	New version of Smart View (Version 22.100) Update GO Secure to OPS BPS Secure

1. System Requirements

The Modernized Smart FIR remains in Excel but now includes the ability to connect directly to the OPS database to initialize and submit the Financial Information Return data.

To use the Smart FIR, an Oracle Excel Add-in is required. System requirements and installation information is provided below.

1.1 Hardware Specification

- **Core Processor**: Official Oracle document specifies the minimum requirement of 1.6 GHz processor.

1.2 Windows / Office Support

- SV 22.100 is supported on Windows 10
- SV 22.100 is supported on Windows 11

MS Office 2013, 2016 ,2019, 2021 and Office 365:

1.3 .NET Framework

For Smart View 22.100, Oracle recommends using .NET Framework version 4.8 or higher. To check the current version installed on your computer, select **Control Panel --> Programs --> Programs and Features,** and locate the version of Microsoft .NET Framework that is installed. If the version is lower than 4.8 you will need to update the .NET Framework version.

If you do not see Microsoft .Net Framework, look for Microsoft ASP .NET

Mental Health	MGCS	2021-10-07	177 KB	1.00
Microsoft 365 Apps for enterprise - en-us	Microsoft Corporation	2022-01-04		16.0.13127.21846
Microsoft ASP.NET MVC 2	Microsoft Corporation	2020-06-23	850 KB	2.0.60926.0
Microsoft Azure Information Protection	Microsoft Corporation	2021-10-12	442 MB	2.12.62.0

1.4 DDE Setting

The DDE setting in Excel must be unchecked. In Excel select **--> File --> Options**

Select **--> Advanced** scroll to the **General** section and ensure **Ignore other applications that use Dynamic Data Exchange (DDE)** is unchecked

Excel Options
General
Formulas
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Number of calculation threads
Use all processors on this computer: 4
Manual 2
Allow user-defined XLL functions to run on a compute cluster
Cluster type:
Options...
When calculating this workbook:
Book1
Update links to other documents
Set precision as displayed
Use 1904 date system
Save external link values
General
Provide feedback with sound
Provide feedback with animation
Ignore other applications that use Dynamic Data Exchange (DDE)
Ask to update automatic links
Show add-in user interface errors
Scale content for A4 or 8.5 x 11" paper sizes
Show customer submitted Office.com content
At startup, open all files in:
Web Options...
Enable multi-threaded processing
Disable undo for large PivotTable refresh operations to reduce refresh time
Disable undo for PivotTables with at least this number of data source rows (in thousands): 300
Create lists for use in sorts and fill sequences:
Edit Custom Lists...
Lotus compatibility
Microsoft Excel menu key: /
Transition navigation keys
OK
Cancel

2. Software Install

You will need Administrator rights to install Smart View and .NET Framework. If you do not already have Administrator access, please contact your local IT support desk to provide the Administrator access. If you have an older version of Smart View, you will need to uninstall that version and reinstall the newer version

Updating Previous SmartView Version

If you currently have an earlier version of Smart View, uninstall the current Smart View to install new Smart View version 22.100

In Microsoft Excel, go to “Smart View” pane and click [? Help] then [About(z)…]

You will be able to locate and determine the current version of Smart View. If the version is not version 22.100, you must uninstall the older version.

To uninstall close all Microsoft Office products, navigate to **Control Panel -> Programs and Features**

Locate “Oracle Smart View for Office” and click uninstall

Install Smart View

Copy or type in the URL and press Enter. The following screen will appear.

https://efis.fma.csc.gov.on.ca/SmartView/SmartView.zip

If you Save the file, once it has been downloaded, proceed to open it.

If you decided to open the file, or to save it, the following screens are the same.

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
SmartView	Application	138,801 KB	No	139,801 KB	1%	01/17/2014 2:41 PM

Double click on the Smart View icon to run it.

You will be prompted to run the file. Click on Run and follow the prompts.

Verify the installation

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

Disable SmartView Add-in in Other Microsoft Office Applications

When Smart View is installed, it will be installed in all Microsoft Office applications. It is recommended that the Add-in be disabled in Outlook, Word, and PowerPoint. See Appendix A forinstructions

3. User Registration

To use the Smart FIR, a one-time registration process is required. This document outlines the steps required to register your user account and access the Smart FIR.

This registration process will require you to go through the following steps:

1. Register for an OPS BPS Secure account
2. Validate your OPS BPS Secure account
3. Request access to Smart FIR
4. Validate your Smart FIR access.
5. Validate your registration settings

To assist you with this process the Smart FIR Registration Application has been provided to you. Follow the steps below to complete the registration and set up of the Smart FIR. See section 3 for details of error and warning messages you may receive during the process.

Should you encounter any issues or have questions as you go through this registration process, please send an email to: FIR.MAH@Ontario.ca.

Current EFIS User

If you are already an EFIS user and have an OPS BPS secure account (formerly GO Secure) you do not have to register for OPS BPS Secure again.

To request access to the Smart FIR please complete the account confirmation form for your municipality. The form can be downloaded from the FIR website:

https://efis.fma.csc.gov.on.ca/fir/index.php/en/municipal-reporting/help/

After submitting the account confirmation form send an email to FIR.MAH@Ontario.ca, requesting access to the Smart FIR. The email should include:

- Municipality name
- First Name
- Last Name
- Email address

You will receive a confirmation e-mail once your account has been provisioned to have access to the Smart FIR. Continue theregistration process at Step 4, of this guide.

Step 1: Register for an OPS BPS Secure account

To register for your new OPS BPS Secure account, open the Smart FIR Registration Application that was included as part ofthe registration package. If the Protected View Warning appears select ***Enable Editing*** to continue. Please ensure that Smart View appears in the Excel ribbon (See Page 10). Select your **Municipality** from the dropdown and then **Click** on the **Smart FIR Registration** button.

The following message will be displayed, please ensure you have completed all the steps in ***Section 1. Smart View Install*** above before you proceed

Select OK to continue. On the OPS BPS Secure login screen click on '***Register new account'.***

Once you select 'Register new account', you will be prompted with the GO Secure ***Basic Information*** screen. Enter allrequired fields and select ***Next.*** *(Note: you will still see some GO Secure screens. These will be replaced in a future release of OPS BPS Secure.)*

You will be asked to enter a GO Secure ID and Password. The GO Secure ID <u>must</u> be a valid <u>email address</u>. The Password must meet the criteria listed on the screen. Finish all the required fields and click on ***Register.***

To complete, read and ***Accept*** Terms and Conditions

After accepting the Terms and Conditions, you will receive the following 'Congratulations' screen confirming that you have successful registered your Go Secure (OPS BPS Secure) account.

Step 2: Validate your OPS BPS Secure account

After accepting the Terms and Conditions at the end of Step 1, an email response will be sent to the email address previously provided in Step 1. Login to your email account, to confirm that you have received the email. Open the email and 'Click' on the link provided in the email. If you do not receive a confirmation email, check your Junk Mail folder. If you still have not received the confirmation email, please contact FIR support (FIR.MAH@ontario.ca).

The link will bring you back to Go Secure ***Sign In*** page. Enter the username and password you provided during the registration process and click on ***Sign In.***

Once you've successfully signed in, you will see the ***GO Secure Login- Email Validation*** screen.

Step 3: Request access to Smart FIR

Once you receive the ***GO Secure Login - Email Validation*** screen, please send an email to: **FIR.MAH@ontario.ca** to notify us that your OPS BPS Secure registration has been completed. The email should Include the following information:

- Municipality name
- First Name
- Last Name
- Email address

Click on ***"Logout"***.

Proceed to **Step 4: Login to Smart FIR and validate access**

Step 4: Login to Smart FIR and validate access

Once your request has been received, the FIR Adminstrator will provision your account. You will then receive a confirmation email. You should receive this email within 48 hours of submitting your request. Please check you Junk mail folder if you have not received the email.

Your account has been set up.

Please use the registration app (Excel) included as part of the registration package to validate your access. This will also check your computer's registry settings and make any necessary adjustments.

Please refer to the registration guide beginning on page 19 for instructions on the use of the registration app.

Prior to running the app, please ensure that Smart View appears in the ribbon of Excel.

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Excel macros must also be enabled.

If you have any problems, please let me know.

Open the Smart FIR Registration app again and select the ***Smart FIR Registration*** button select your **Municipality** and log in to Go- Secure

The following message will be displayed. Please ensure you have completed all the steps in Section 1., Smart View Install, before you proceed.

The OPS BPS Secure login screen will be displayed,

The Smart Fir Registration Application will update the ***Check List*** with checks in each of the boxes Select ***OK*** to continue.

Excel must be restarted after the registration is completed, select --> **Yes.** Excel will close.

If you select --> **No**, the following message will be displayed

Select **--> OK** and Excel will shutdown

Congratulations! You have now completed the registration process and are ready to use the Smart FIR.

4. Initialize Smart FIR

When the Smart FIR is released on the FIR website you will receive notification. Please download the Smart FIR and initialize.

https://efis.fma.csc.gov.on.ca/fir/index.php/en/financial-information-return-en/

Follow the instructions in the User Guide section 2.1 to initialize your Smart FIR

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5. Error and Warning Messages

Smart View Installation Messages

Issue

Smart View is either not installed or is not currently enabled.

Corrective Action

The following versions of Smart View are supported: "11.1.2.5.520", "11.1.2.5.600", "11.1.2.5.710", "21.100", “21.200” and “22.100” however **we recommend that Smart View 22.100 be installed**. Follow the instructions in section ***2. Smart View Install***.

If an Older Version of Smart View is installed, uninstall the older version then install version 22.100.

If Smart View is installed but is not appearing in the ribbon, it may not be enabled.

To Enable the Smart View Add-in, **Select --> File --> Options**

Select **Add-ins → Manage: COM Add-ins** (from Dropdown menu) and click **GO,** then **OK.**

Check the Oracle Smart View for Office box and click OK.

After clicking **OK** you will be returned to the previous page.

Select **Add-ins → Manage: Excel Add-ins** (from Dropdown menu) and click **GO,** then **OK.**

Click on the Oracle Smart View for Office box and click OK

Restart Excel and Smart View should be visible in the ribbon indicating the **Smart View Add-in** is enabled.

Registration Incomplete

Issue

User is not registered with OPS BPS Secure or the user cancelled the login process.

Corrective Action

Complete Step 1 to register for an OPS BPS Secure account and then re-run the Smart FIR Registration app (Step 4).

Appendix A

Disable Smart View in Outlook

If Smart View is enabled in Outlook, you will see the **Smart View** menu item on the menu bar at the topof the page. **Select --> File --> Options**

The Outlook Options control panel will be displayed. **Select --> Add-ins**

The Add-ins Management panel will be displayed. **Select --> COM Add-ins** from the dropdown then **select --> Go**

Scroll down until you find the **Oracle Smart View for Office** Add-in, uncheck the box and **select--> OK**

The Smart View menu item will no longer be displayed.

Disable Smart View in Word

If Smart View is enabled in Word, you will see the **Smart View** menu item on the menu bar at the top of the page. **Select --> File --> Options**

The Outlook Options control panel will be displayed. **Select --> Add-ins**

The Add-ins Management panel will be displayed. **Select --> COM Add-ins** from the dropdown then **select --> Go**

Scroll down until you find the **Oracle Smart View for Office** Add-in, uncheck the box and **select--> OK**

Return to the Add-ins Management panel. **Select --> Actions** from the dropdown then **select --> Go**

Scroll down until you find the **Hyperion Smart View Recognizer** Add-in, uncheck the box and **select-->OK**

The Smart View menu item will no longer be displayed

Disable Smart View in PowerPoint

If Smart View is enabled in PowerPoint, you will see the **Smart View** menu item on the menu bar at the top of the page. **Select --> File --> Options**

The Outlook Options control panel will be displayed. **Select --> Add-ins**

The Add-ins Management panel will be displayed. **Select --> COM Add-ins** from the dropdown then **select --> Go**

Scroll down until you find the **Oracle Smart View for Office** Add-in, uncheck the box and **select--> OK**

Return to the Add-ins Management panel. **Select --> Actions** from the dropdown then **select --> Go**

Check the **Enable additional actions in the right click menu** box then scroll down until you find the **Hyperion** Add-in, uncheck the box and **select--> OK**

The Smart View menu item will no longer be displayed