



R1 Workstation Readiness Checklist

Document Control Information

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1 R1 Workstation Readiness Checklist

1.1 Purpose of the Document

The purpose of this document is to define the steps required to get user's Workstation/desktop ready for using Release 1 of North Carolina Financial System (NCFS).

1.2 Audience

The target audience for this deliverable will be primarily be following roles.

- Agency Desktop Support.
- Agency Technical Point of Contact.
- NCFS users who have administrative rights on their Workstation.

1.3 Checklist

The NCFS application requires user's Workstation/desktop to have following configurations for optimal experience while using the application. The workstation requirements are described by the events over two months.

#	Workstation Requirement	Need for Training 2/15/21	Need for 04/05/21 Go live
1	Windows 10	X	X
2	Microsoft Office 2013 or higher	X	X
3	One of the supported browsers	X	X
4	Google Chrome Browser	X	X
5	Browser Pop-ups and downloads	X	X
6	Browser set to update automatically	X	X
7	Oracle Excel plugin is installed *		X*

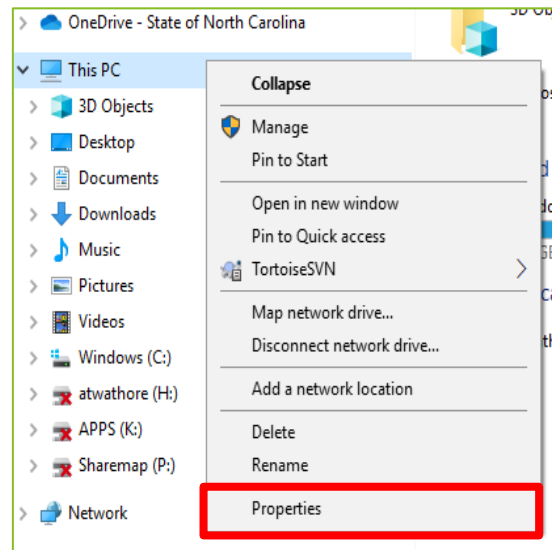
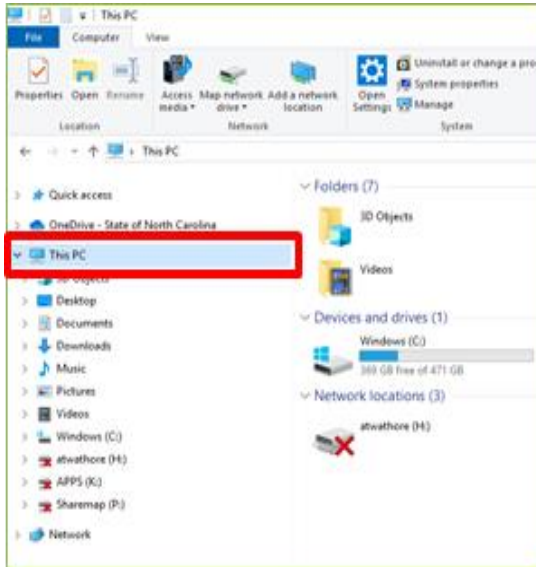
* Oracle Excel plugin is required to do Excel uploads to NCFS. If your job role does not require to upload transactions via Excel, you do not need Excel plug in.

2 Steps to Verify Checklist

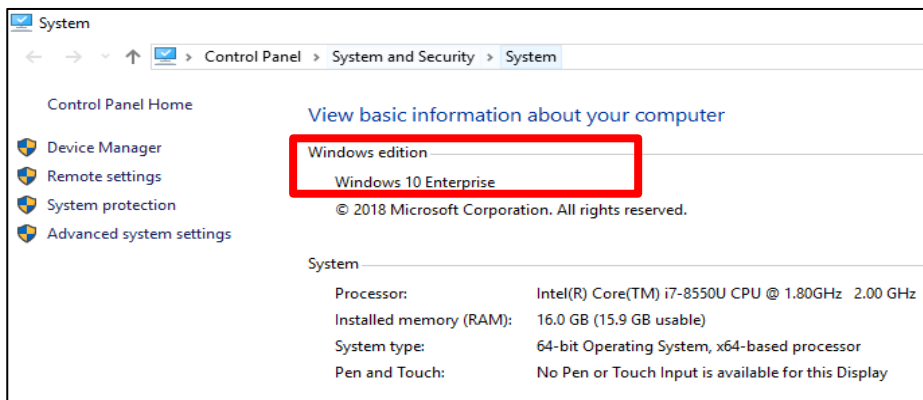
This section describes steps to configure Workstation as per checklist.

2.1 Workstation is Running Windows 10

- Start Windows Explorer. In left navigation pane, select “This PC” and right click on it.
- Then click on “Properties”.



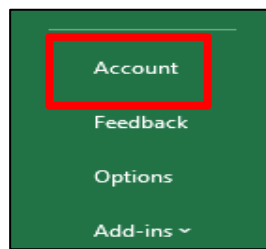
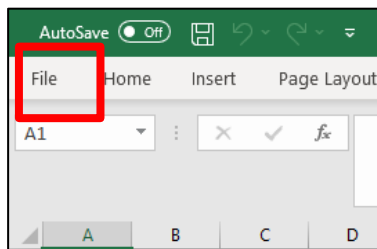
- You will see information about your computer. It tells you Windows version you are using. You should be using Windows 10.



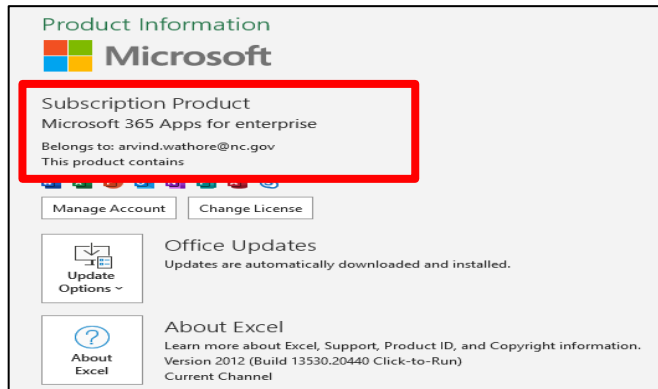
- Workstation microphone and speaker are not needed for using NCFS application. However, it is recommended for online meeting with FBR team to troubleshoot issues.
- A broadband internet connection is recommended for using NCFS application. Using hot spot or Mi-fi connection may not be optimal.

2.2 Workstation is Running Microsoft Office 2013 or Higher

- Open a new empty Excel Sheet. Click on File. Click on Accounts.



The product information screen will show the version of Microsoft Office you are using.

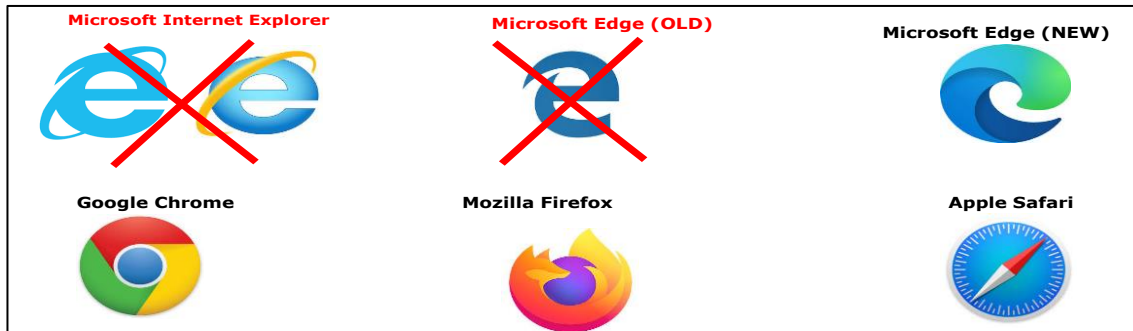


2.3 Workstation is Running One of the Supported Browsers

- By looking at the icon of your browser you can find out which browser you are using.
- **Microsoft Internet Explorer is not supported. Microsoft has two versions of Edge browser. Both are called Edge. Old Edge icon looks like Internet**

Explorer. New Edge Icon is different, it is based on Chromium. Avoid using old version of Microsoft Edge.

- Install and use one of the supported browsers.



2.4 Google Chrome for Training on 15-Feb-2021

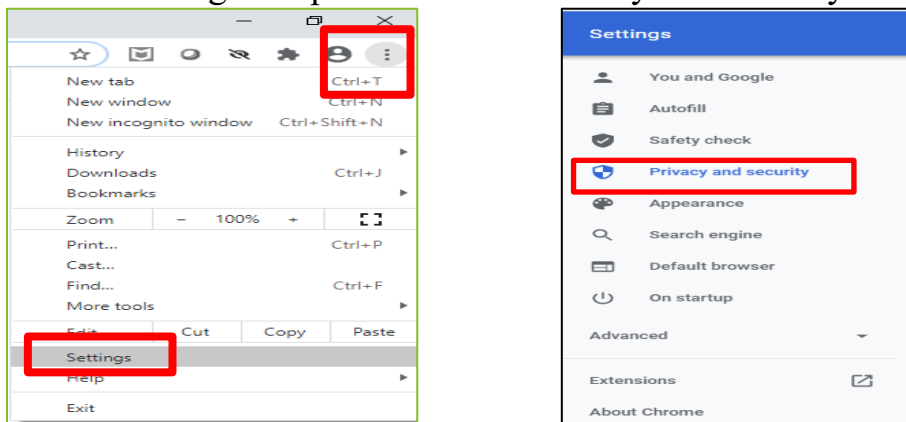
- For training on 02/15/21, the FBR team will be using GoToMeeting. GoToMeeting recommends using Chrome. Some of the features do not work in Firefox or other browsers.

2.5 Enable Pop-ups in a Browser

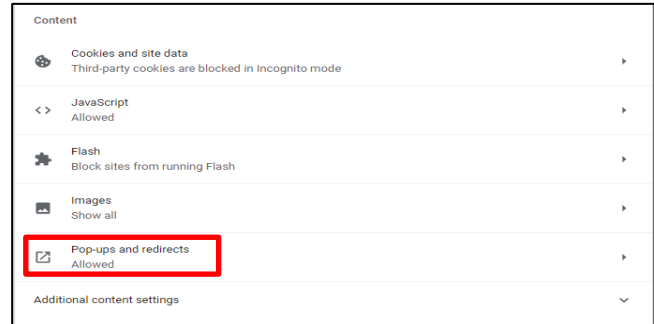
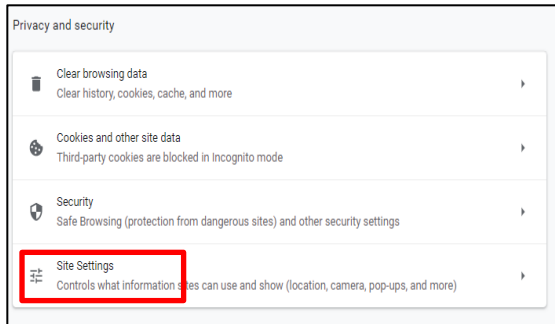
- While using NCFS application, if a user clicks on the help icon (?) or Application Help link under preference, the application will open a new browser window. To open the new browser window, pop-ups should be enabled, from Oracle’s website <https://oraclecloud.com> and <https://oracle.com>.

2.5.1 Enabling Pop-ups in Chrome

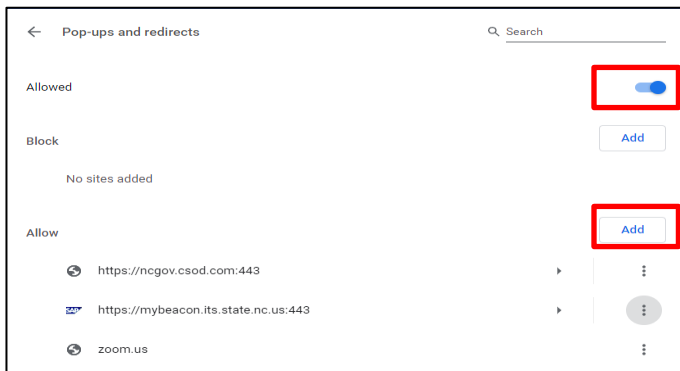
- Click on three vertical dots on top right corner and select “Settings”.
- In left navigation pane click on “Privacy and Security”.



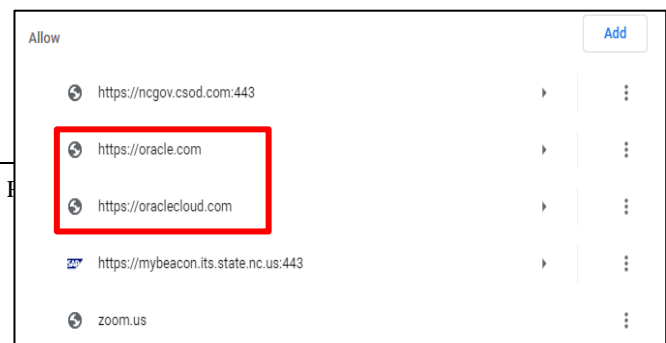
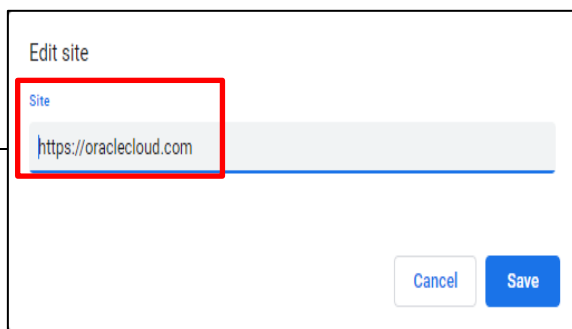
Then click on “Site Settings”. Then click “Pops and Redirects”



- Make sure “Allowed” is checked. The under Allow click “Add” button.

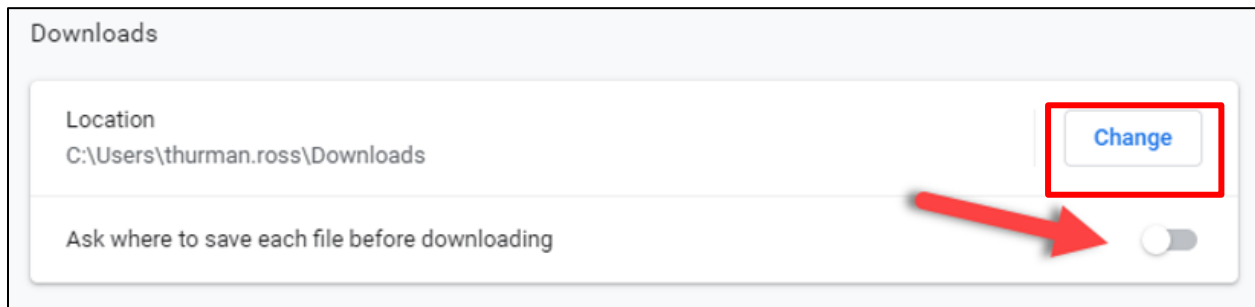


Add website <https://oraclecloud.com> and click “Add” button. Then click “Add” button. Add website <https://oracle.com> and click “Add” button. Now you should see <https://oraclecloud.com> and <https://oracle.com> under the allow section.



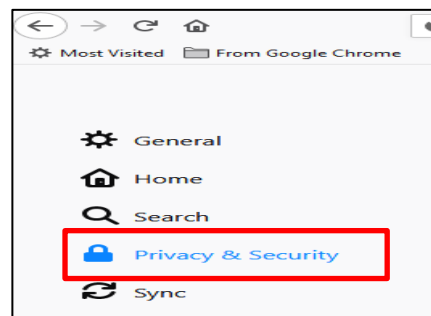
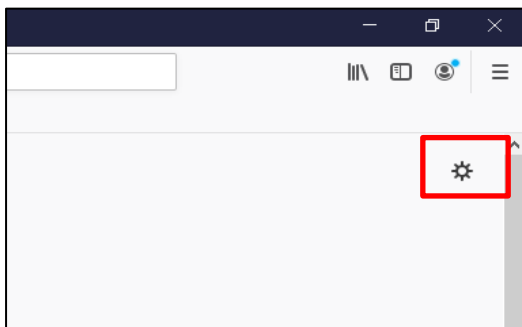
Chrome - Downloads

- When user runs reports in Oracle, your browser may ask if you want to save or open the file. Setting default as save in download folder will eliminate this message.
- Click on three dots on top right corner. Click on “Settings”. Click on “Advanced”. Click on “Downloads”.
- Click on the “Ask where to save each file before downloading” toggle switch so that it is “off” as shown below.
- Close your browser completely and reopen the browser.



2.5.2 Enabling Pop-ups in Firefox

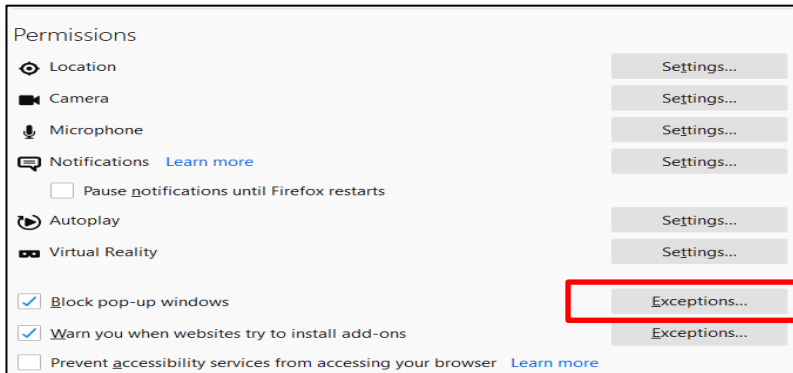
- Click on Gear icon on top right corner. Click on “Privacy & Security”.



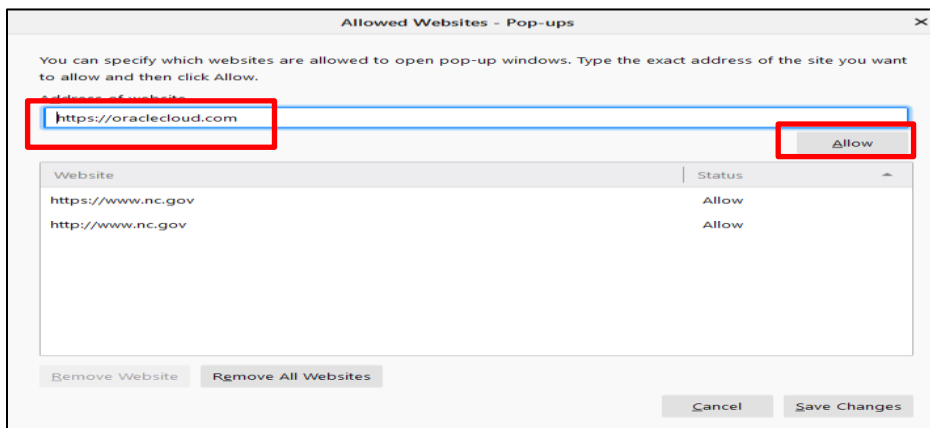
- If in your browser “Block pop-up windows” is **unchecked** and “Exception” button is grayed out, then pop-ups are already allowed. Do not make any changes.



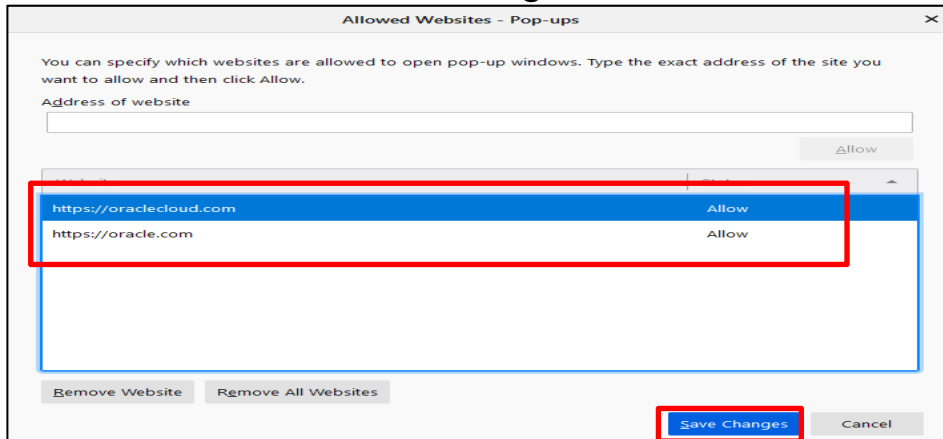
- If in your browser “Block pop-up windows” is **checked** then click on “Exceptions” button.



6) Add website <https://oraclecloud.com> and click “Allow” button. Add website <https://oracle.com> and click “Allow” button.

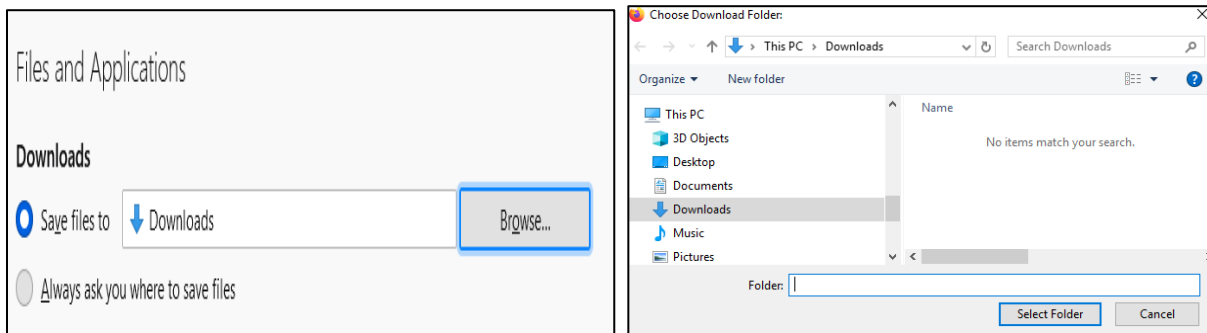


- Now the site <https://oraclecloud.com> and <https://oracle.com> should show in the list. Click “Save Changes” button and exit.



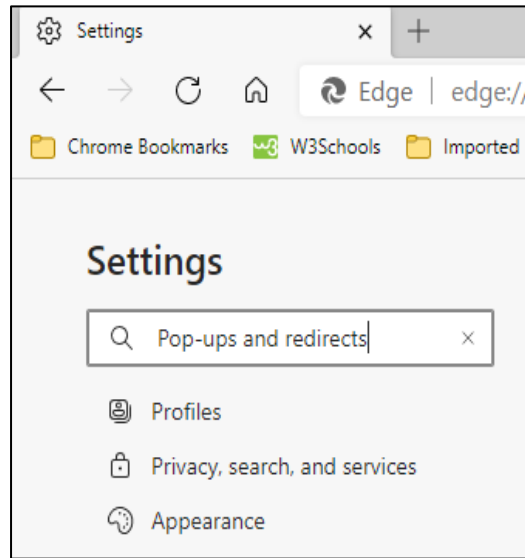
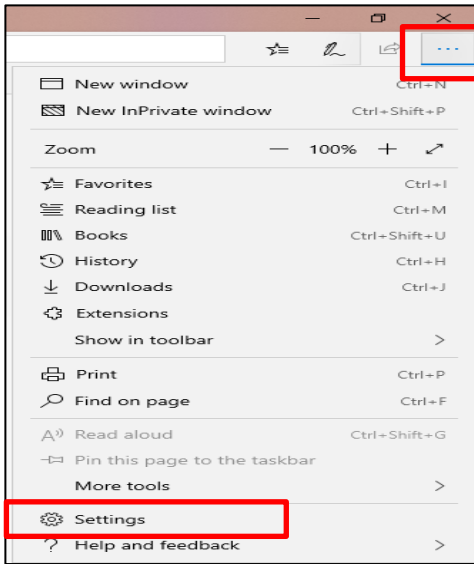
Firefox - Downloads

- Click on Gear icon on top right corner.
- Scroll down till you see “Files and Application” Section.
- Make sure “Always ask you where to save files” is not checked, “Save Files To” is checked and folder name is “Downloads”.
- You can select the “Downloads” folder by clicking on the “Browse” button.



2.5.3 Enabling Pop-ups in Edge

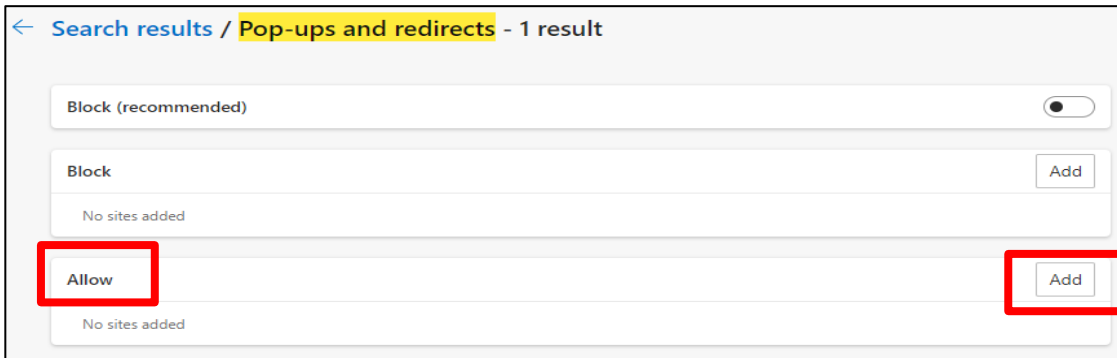
- Click on three horizontal dots on top right corner. Select “Settings”.
- In “Settings” enter “Pop-ups and redirects”.



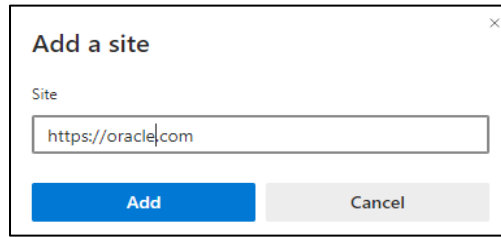
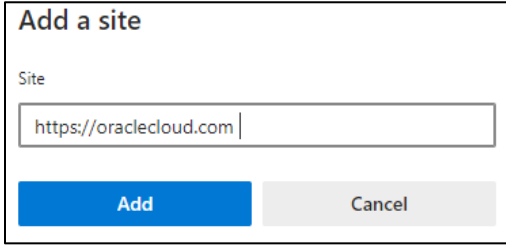
- Click on “Pop-ups and redirects”.



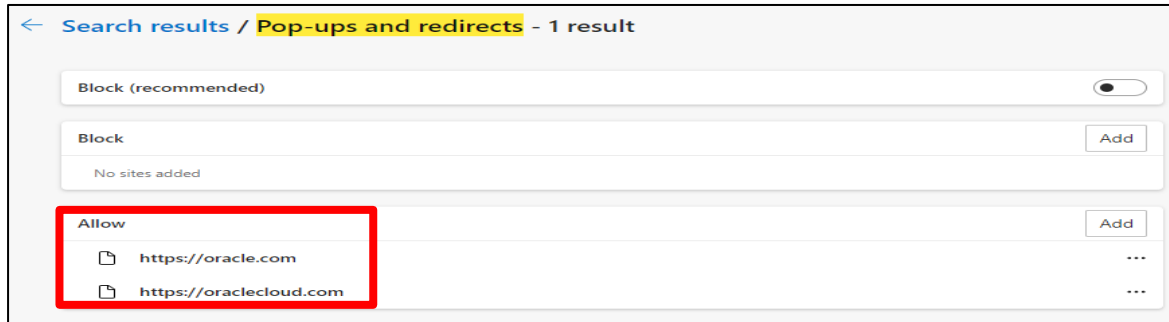
- Click on the “Add” button under allow.



- Add website <https://oraclecloud.com> and click “Add” button.
- Add website <https://oracle.com> and click “Add” button

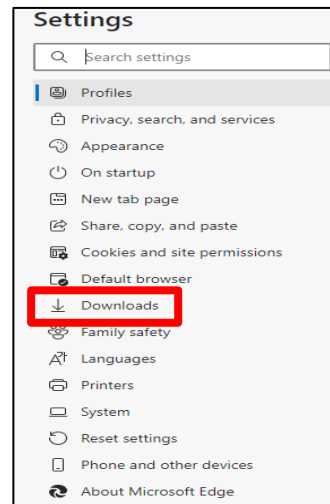
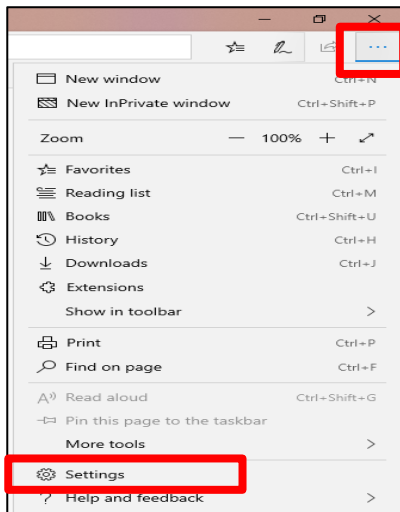


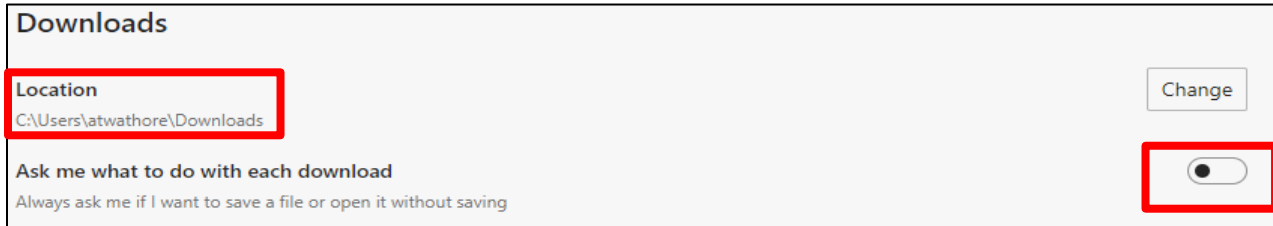
- Under Allow, you should see both **https://oraclecloud.com** and **https://oracle.com**



Edge - Downloads

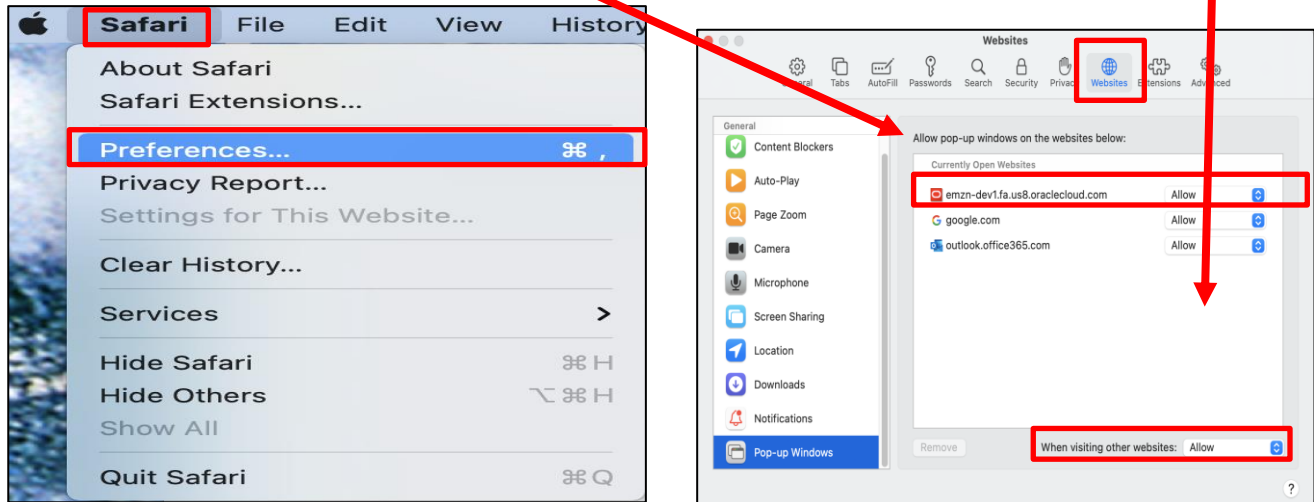
- Click on three dots on top right corner.
- Select “Settings”. Click on “Downloads”.
- Make sure directory shown on the location is “C:\Users\your userid\Downloads” If it is not, click on Change button to select Downloads folder.
- Also make sure “Ask me what to do with each download” is turned off.





2.5.4 Enabling Pop-ups in Safari

- Please do not use Safari browser on Microsoft Windows Workstation/desktop. Apple no longer offers Safari updates for Windows. You must use Microsoft Windows for Excel upload. Oracle does not support Excel uploads in Safari.
- Open Safari Browser and click on > Safari > Preferences.
- Click on “Website” Tab. At bottom right corner click on “When visiting other websites” and select “Allow”.
- **IF** you are already in Oracle application, then click on that application(s) and select “Allow”.

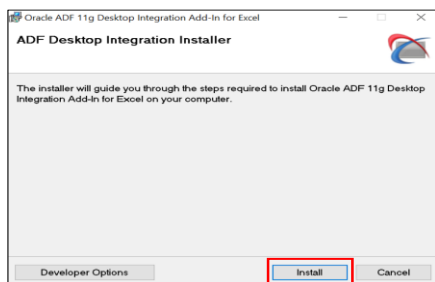


2.6 Browser Set to Update Automatically

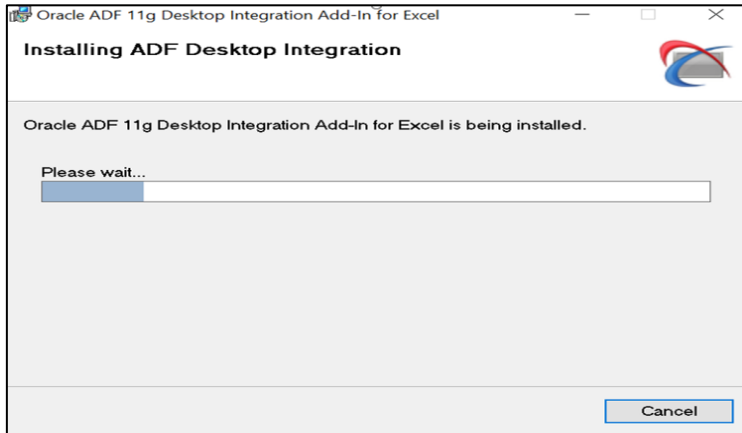
- By default, Chrome, and Edge update automatically. There is nothing to setup.
- Firefox does not update automatically. You must uninstall Firefox and install new version.
- To Update Safari
 - Go to Apple menu > System Preferences.
 - Click on Software Update.
 - Check the “Automatically keep my Mac up to date” box in Software Update.

2.7 Install Oracle Excel Plugin

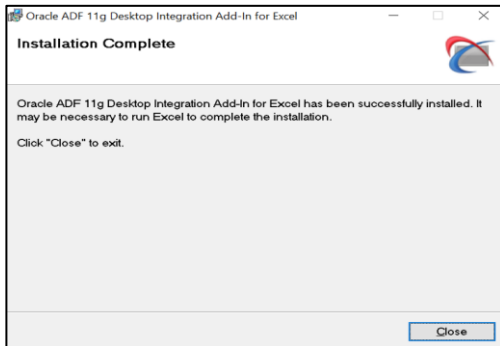
- Oracle Excel plugin is required for using Excel uploads in NCFS. Use of Apple Mac to do Excel uploads is not supported. If your role does not require you to upload transactions using Excel, then you do not need Excel plugin.
- Close all Microsoft Excel instances prior to downloading the executable.
- Download Oracle Excel Plugin “adfdi-excel-addin-installer.zip” from OSC website, <https://www.osc.nc.gov/state-agency-resources/north-carolina-financial-system-ncfs-resources>
- Unzip the file and double click to run the adfdi-excel-addin-installer.exe file. Click “Install”.



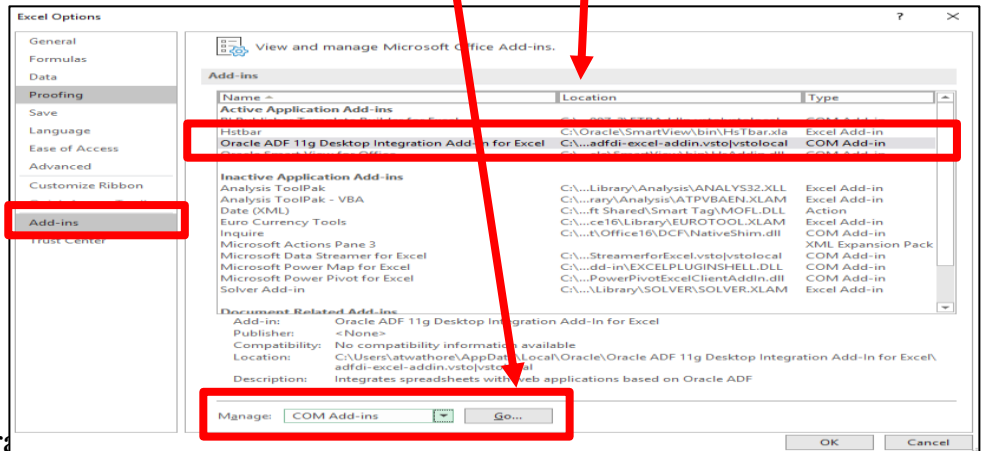
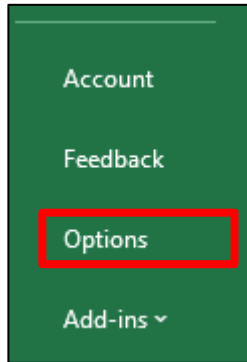
- You see the processing bar as the desktop integration installs on your machine.



- Once the process is completed, you see the **Installation Complete** message. Click **Close**.



- Open an empty Excel file and click on File > Options > click on “Add-ins”.
- Make sure you can see “Oracle ADF 11g Desktop Integration Add-In for Excel” is in the list. This means the Oracle Excel plugin was installed.
- Select “COM Add-ins” in the Manage dropdown. And Click “Go



- Make sure “Oracle ADF 11g Desktop Integration Add-in for Excel” checkbox is checked. This means the Oracle Excel plugin is enabled for use.

