

# R3 Technical Readiness

---

Workstation Readiness

April 4, 2023

# Objectives

---

- Review Desktop Readiness Requirements
- Provide Action Items for Desktop Support Personnel
- Provide contacts to answer questions

# Workstation Readiness

---

Arvind Wathore, FBR Technical Lead

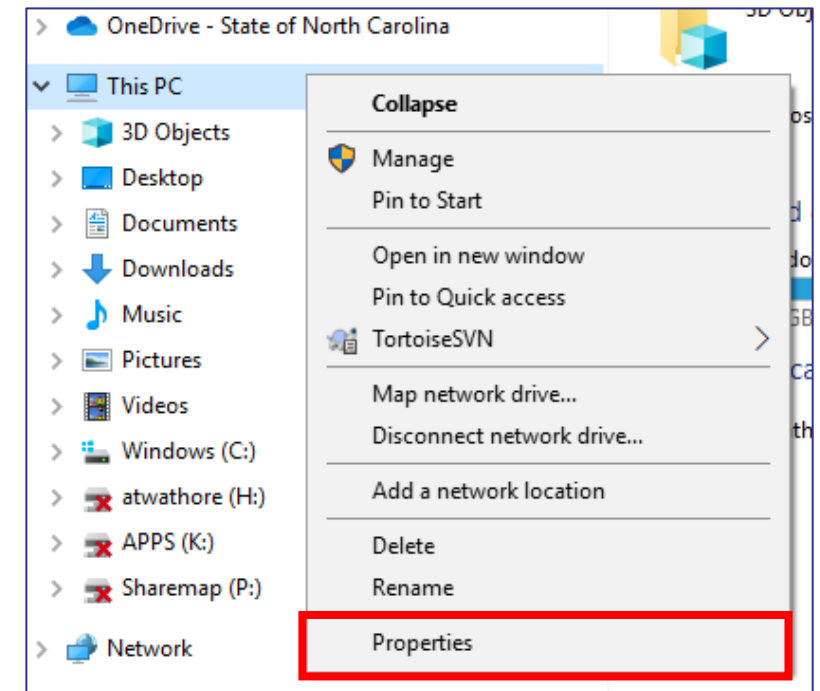
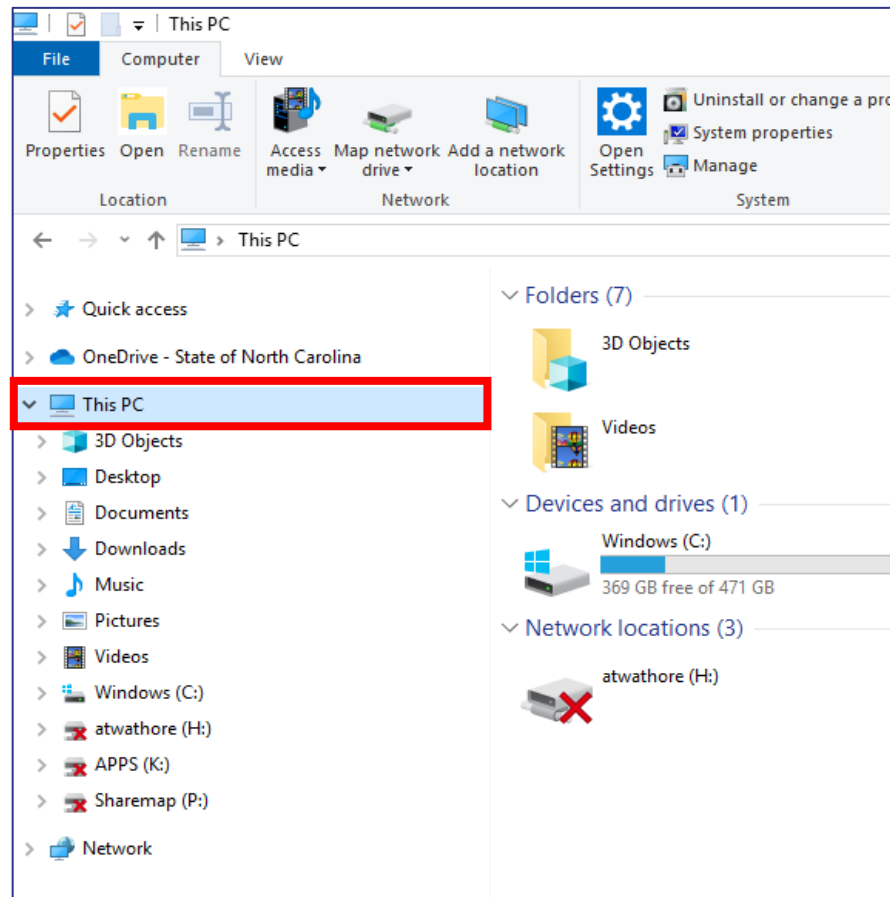
# R3 Workstation Readiness Checklist

#	Workstation Requirement	For anyone participating in UAT starting 4/21/23	For anyone attending End User Training starting 07/17/23
1	Windows 10 or higher	X	X
2	Microsoft Office 2013 or higher	X	X
3	One of the supported browsers, Chrome, Firefox, Edge, or Safari (no IE)	X	X
4	Browser setting for Pop-ups, downloads, and Cache	X	X
5	Browser set to update automatically	X	X
6	Bookmark NCFS login Page	X	X
7	<i>Oracle Excel plugin is installed *</i>	X*	X*

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

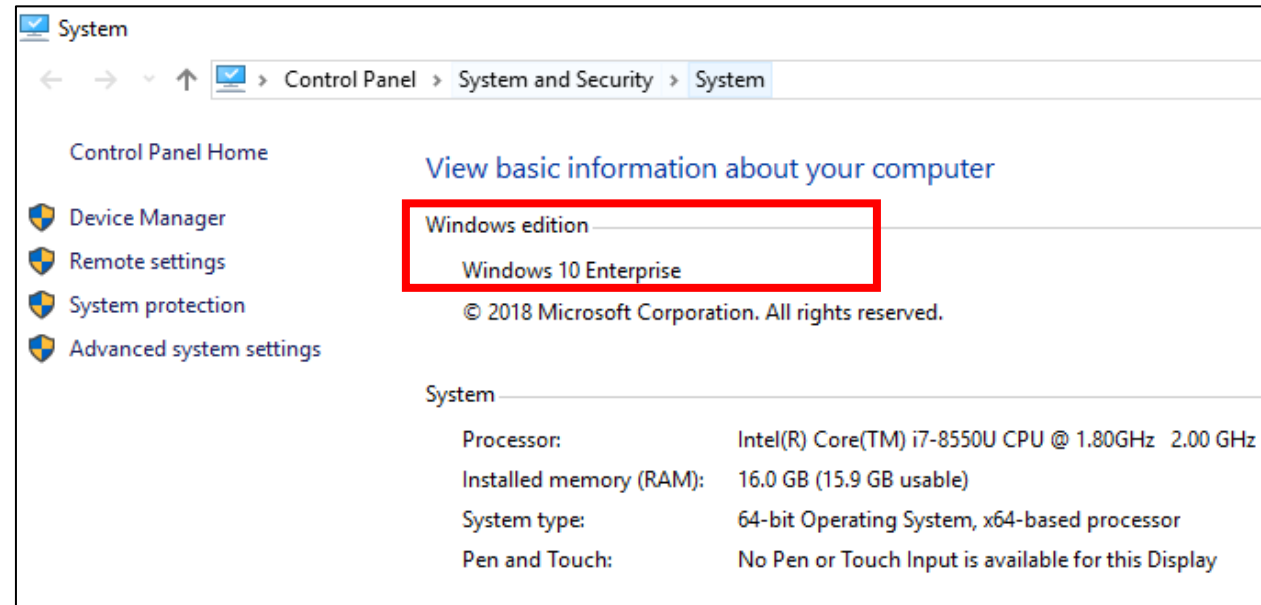
# #1 - Workstation Windows 10 or Higher

1. Start Windows Explorer. In left navigation pane, Select "This PC" and right click on it.
2. Then click on "Properties"



# #1 - Workstation Windows 10 or Higher

3. You will see information about Windows version you are using. You should be using Windows 10 or higher.

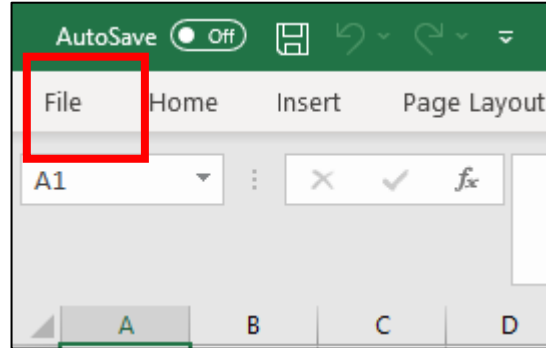


4. Workstation microphone and speaker are not needed for using NCFS application. However, it is recommended for online meeting with FBR team to troubleshoot issues.
5. A broadband internet connection is recommended for using NCFS application. **Using hot spot or Mi-fi connection may not be optimal.**

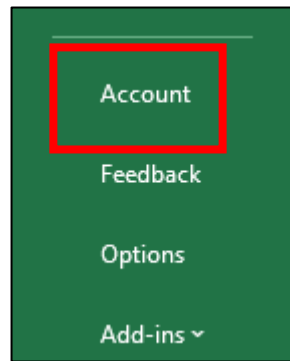
# #2 - Running Office 2013 or Higher

---

1. Open a new empty Excel Sheet
2. Click on File



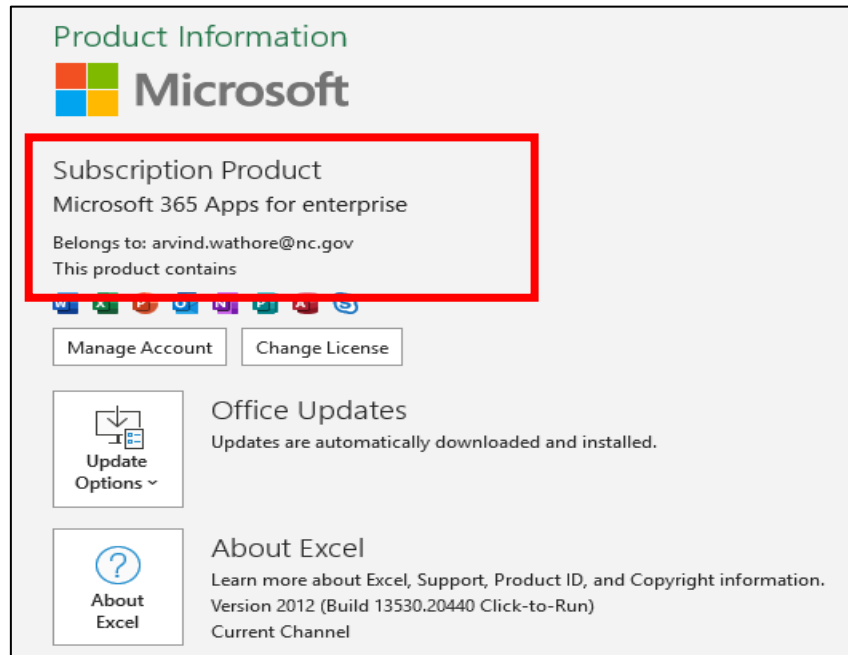
3. Click on Accounts



# #2 - Running Office 2013 or Higher

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

Workstation using Office 365- cloud subscription

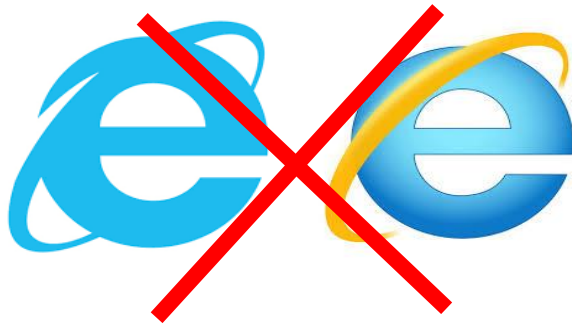




# #3 - Running Supported Browsers

- 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 Microsoft Edge.
- Install and use one of the supported browsers.0

**Microsoft Internet Explorer**



**Microsoft Edge (OLD)**



**Microsoft Edge (NEW)**



**Google Chrome**



**Mozilla Firefox**



**Apple Safari**



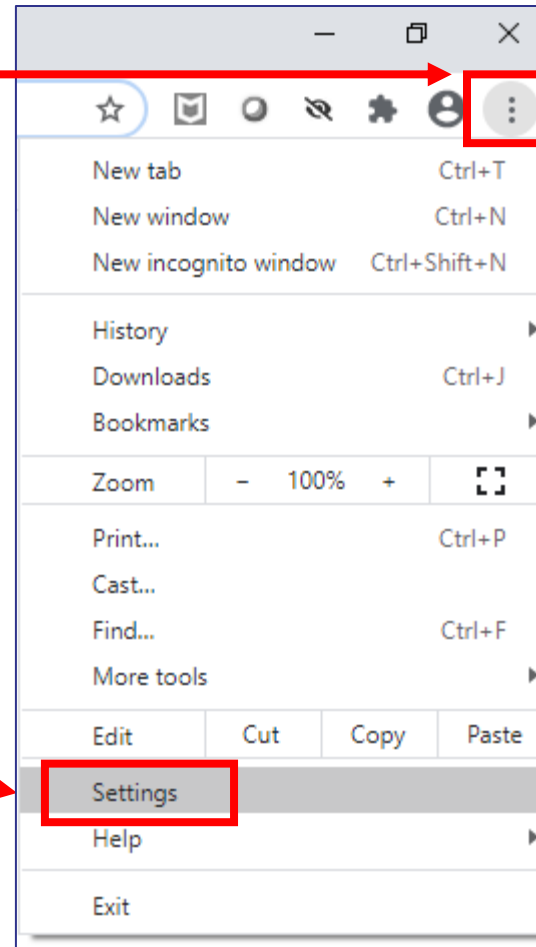
# #4 Browser Setting for Pop-Ups and File Download

---

- While using NCFS application, if a user wants to run a report, or clicks on the help icon (?) or Application Help link under preference, the application will open a new browser window.
- If your browser has pop-ups disabled, you will not see a new browser window. Once you enable pop-ups from Oracle's website <https://oraclecloud.com> and <https://oracle.com> , you will see a new browser window.
- 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.

# #4 - Enabling Pop Ups - Chrome

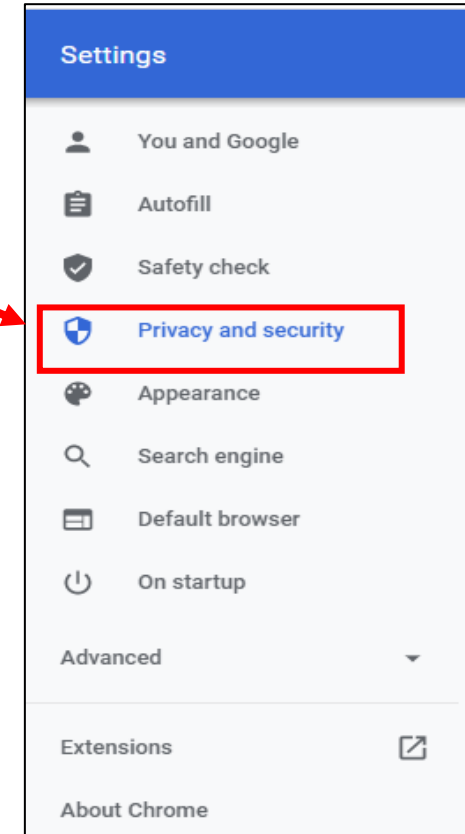
1. Click on three dots on top right corner



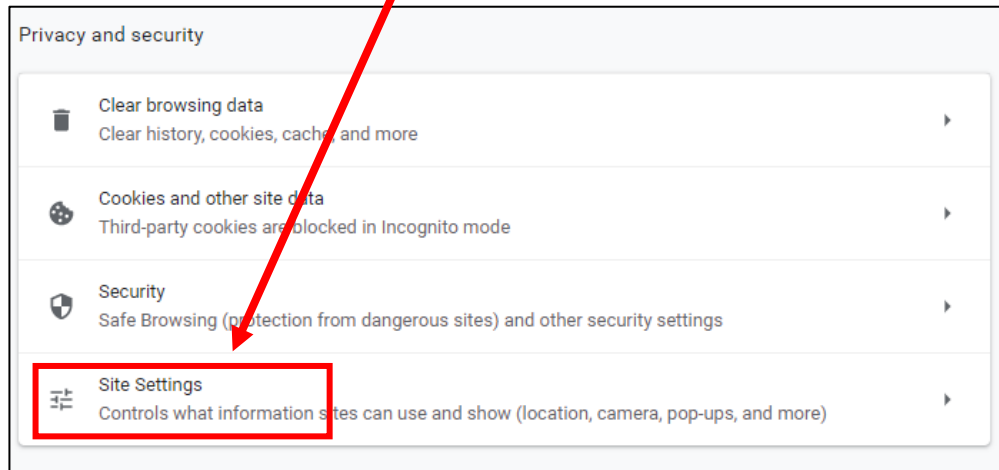
2. Select "Settings"

# #4 - Enabling Pop Ups - Chrome

3. In left navigation pane click on "Privacy and Security".

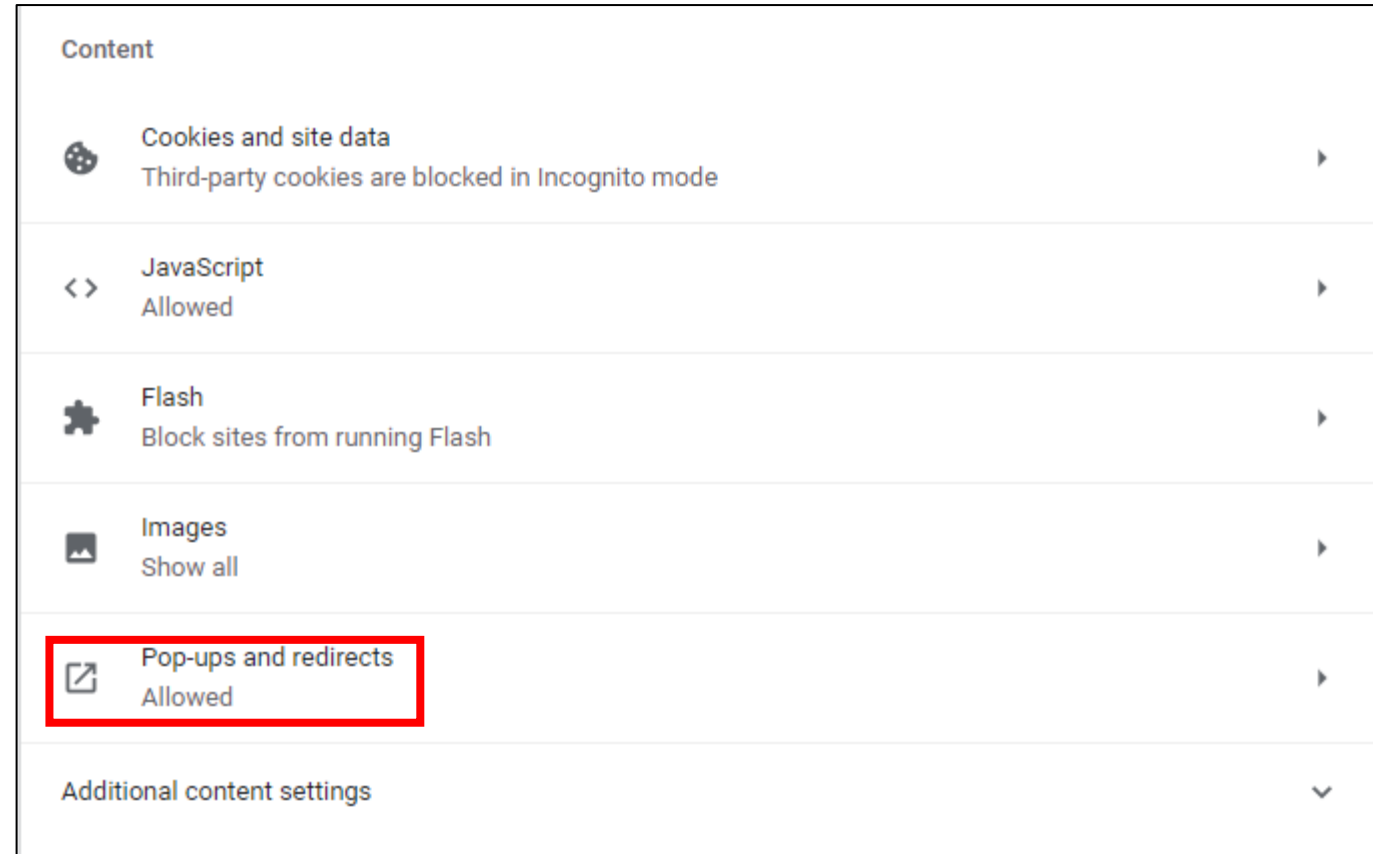


4. Then click on "Site Settings"



# #4 - Chrome - Enabling Pop Ups

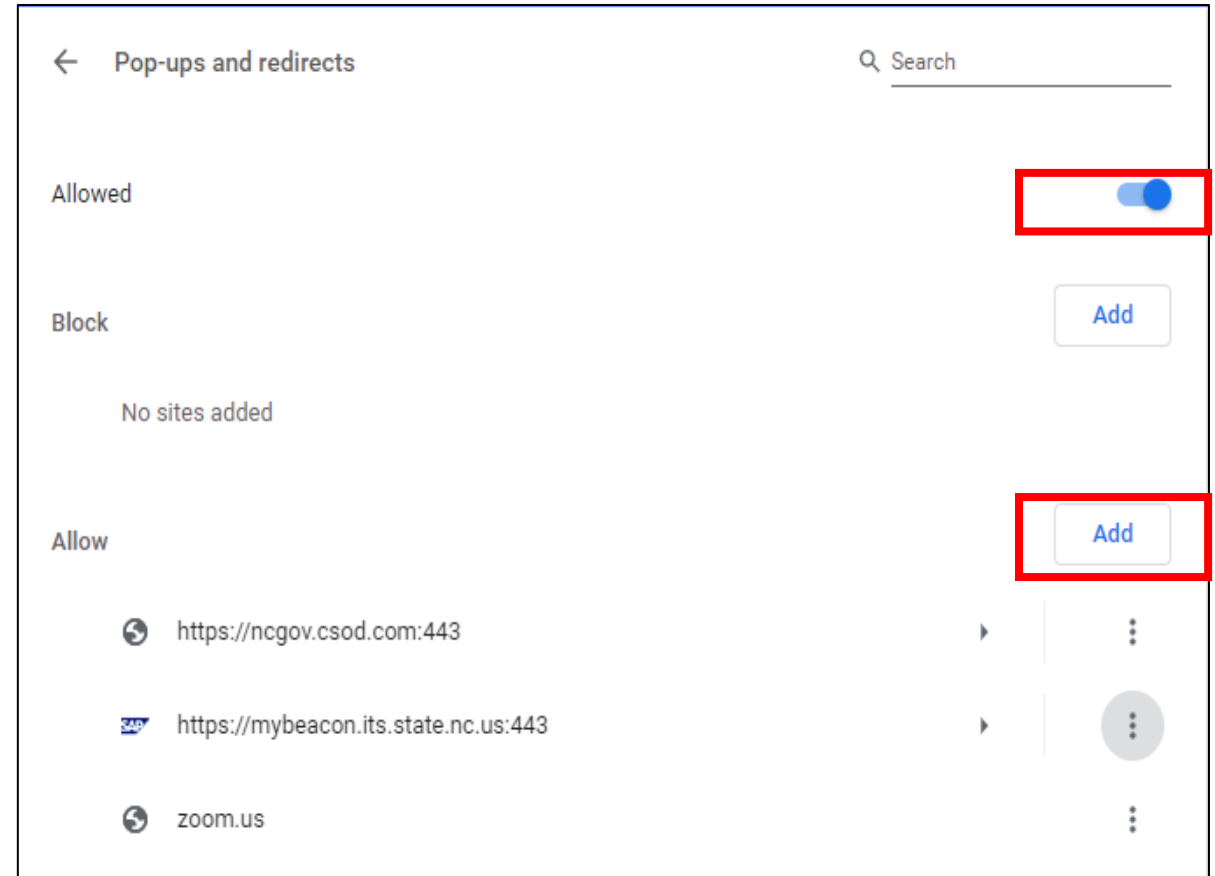
5. Then click "Pops and Redirects"



# #4 - Chrome - Enabling Pop Ups

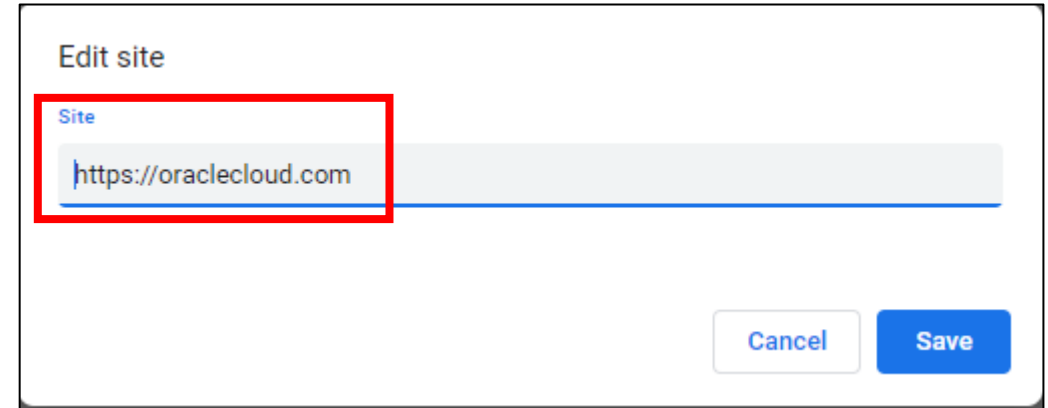
6. Make sure "Allowed" is checked.

7. The under Allow click "Add" button.

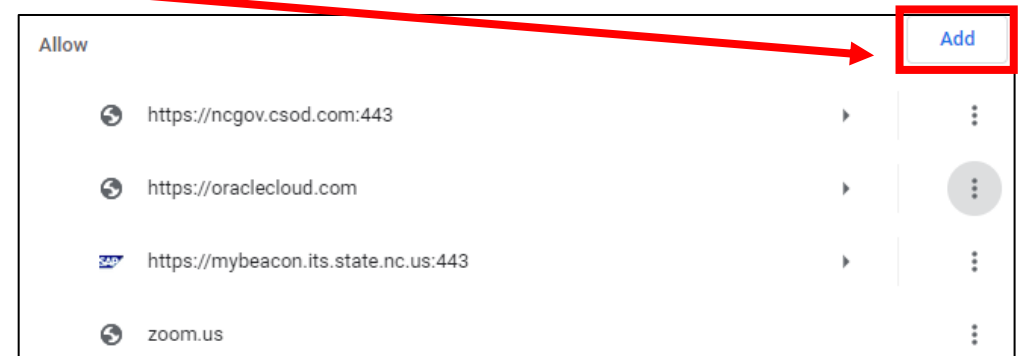


# #4 - Chrome - Enabling Pop Ups

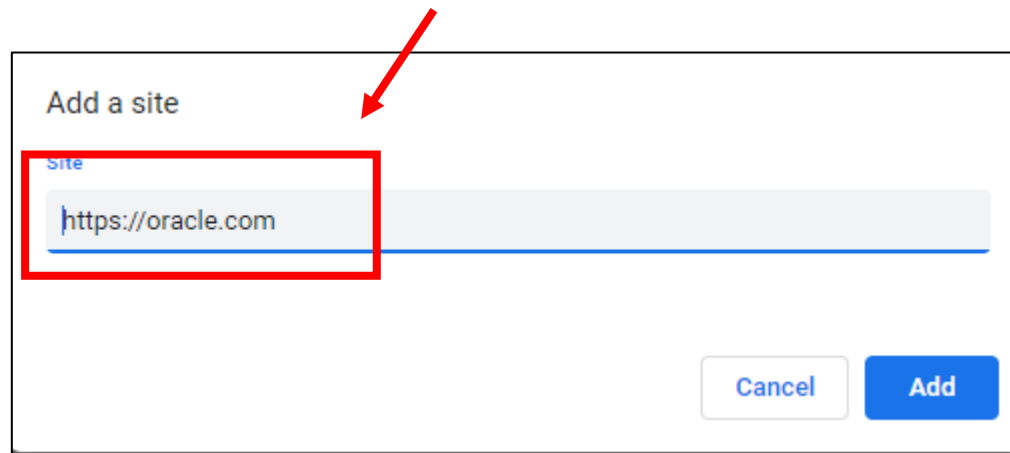
8. Add website <https://oraclecloud.com> and click "Add" button



9. Click "Add" button

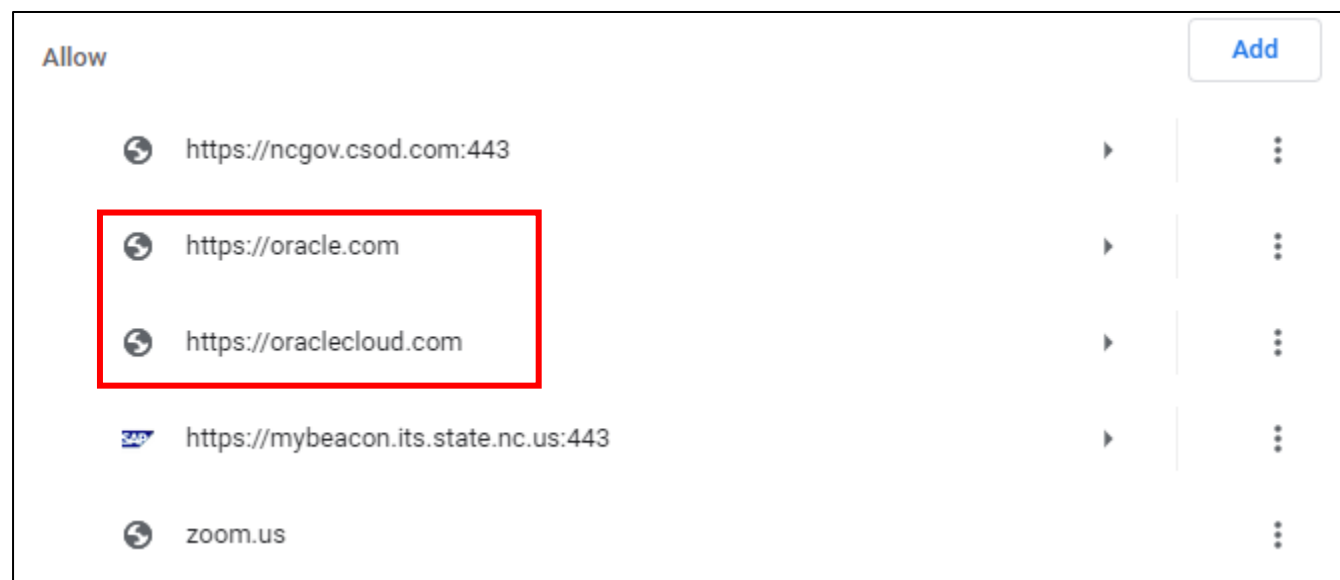


10. Add website <https://oracle.com> and click "Add" button.



# #4 - Chrome - Enabling Pop Ups

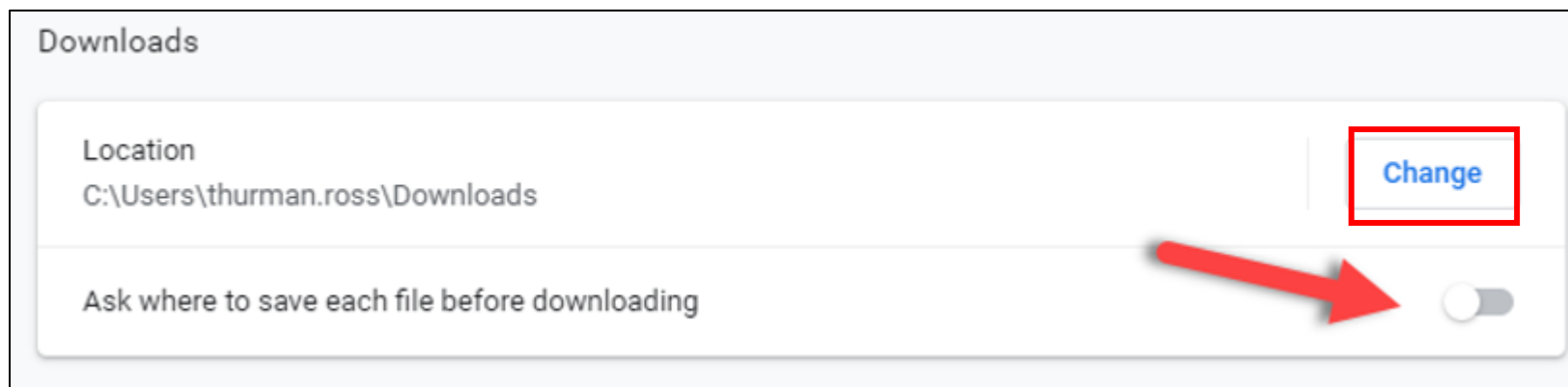
- Now you should see <https://oraclecloud.com> and <https://oracle.com> under the allow section.





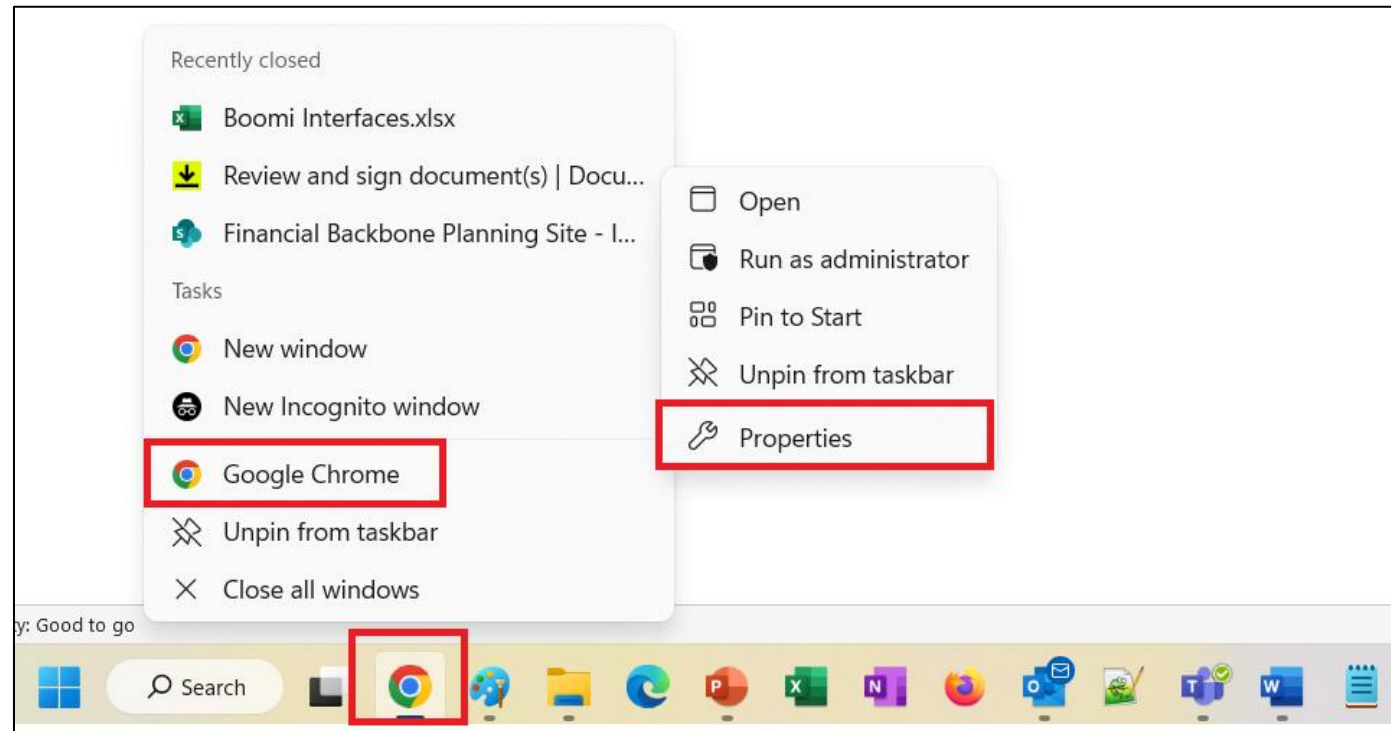
# #4 - Chrome – Downloads

1. Click on three dots on top right corner. Click on “Settings”.
2. Click on “Downloads”.
3. Click on the “Ask where to save each file before downloading” toggle switch so that it is “off” as shown below.
4. Close your browser completely and reopen the browser.



# #4 - Chrome - Set Disk Cache Size to 1024MB

1. Go to your Desktop. Right Click on the Google Chrome icon in desktop. Select Properties.
2. If you don't have Chrome icon on Desktop, then right click on Chrome icon on toolbar at the bottom of laptop and Google Chrome icon will appear in a window. Right click on that Google Chrome icon and Select properties.



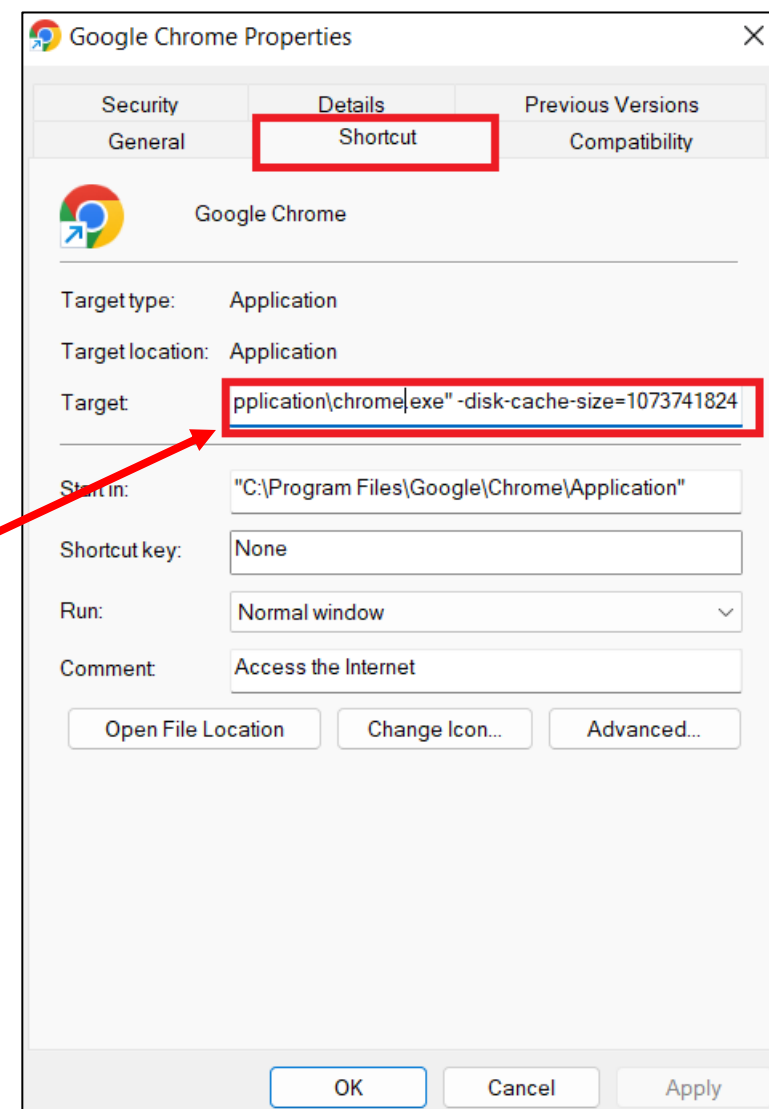
# #4 - Chrome - Set Disk Cache Size to 1024MB

3. Click on Shortcut Tab. Click on the Target Box and scroll to right.
4. At the end of the Target box, AFTER the double quotes, add -disk-cache-size=1073741824.


It should look like this

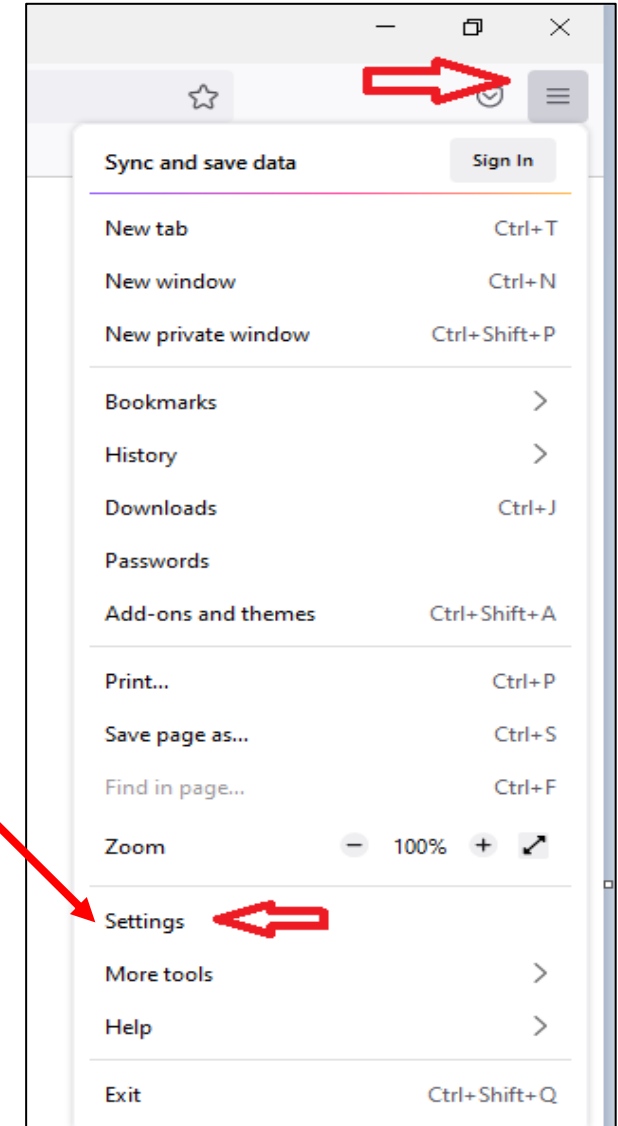
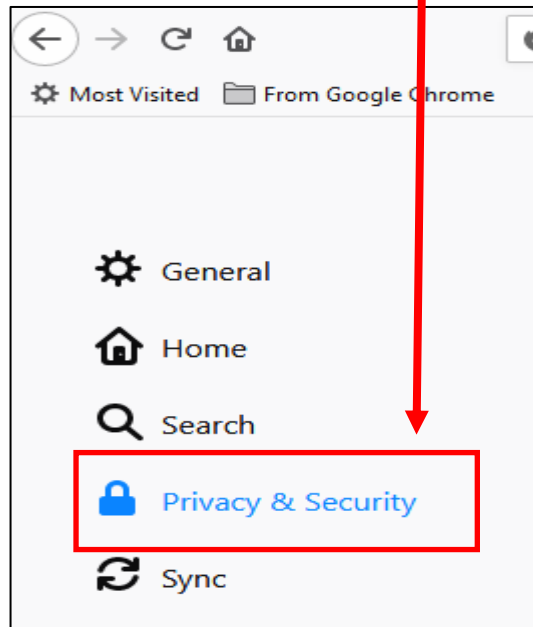
- ".....\Application\chrome.exe" -disk-cache-size=1073741824

5. Click "OK"
6. Close the browser and restart the browser.



# #4 - Firefox - Enabling Pop Ups

1. Click on Menu icon  on top right corner and select "Settings".
2. Click on "Privacy & Security".



# #4 - Firefox - Enabling Pop Ups

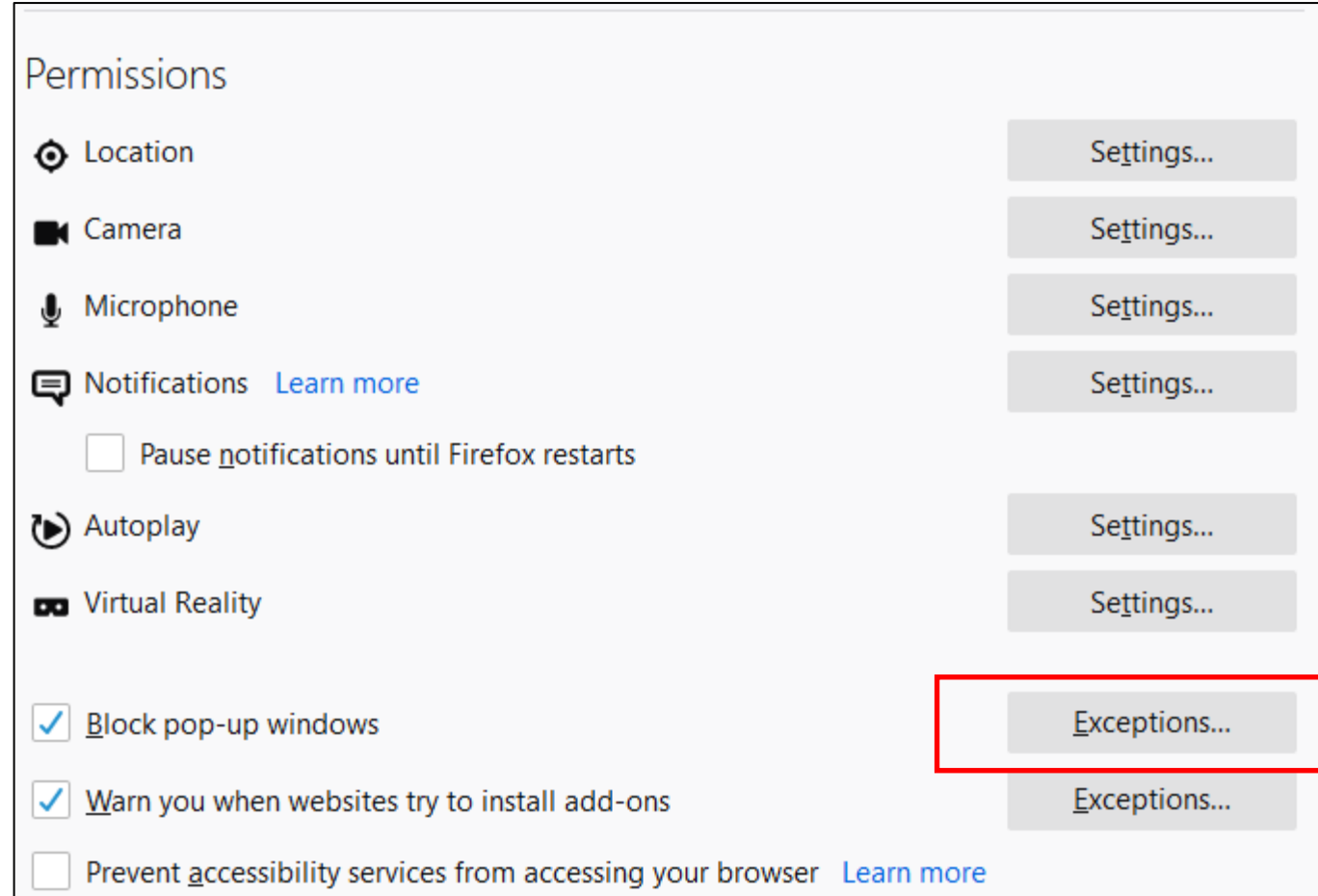
3. Scrolls down and look for Pop-up. If in your browser “Block pop-up windows” is unchecked and “Exception” button is grayed out, then pop-ups are already allowed.



4. Do not make any changes.

# #4 - Firefox - Enabling Pop Ups

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

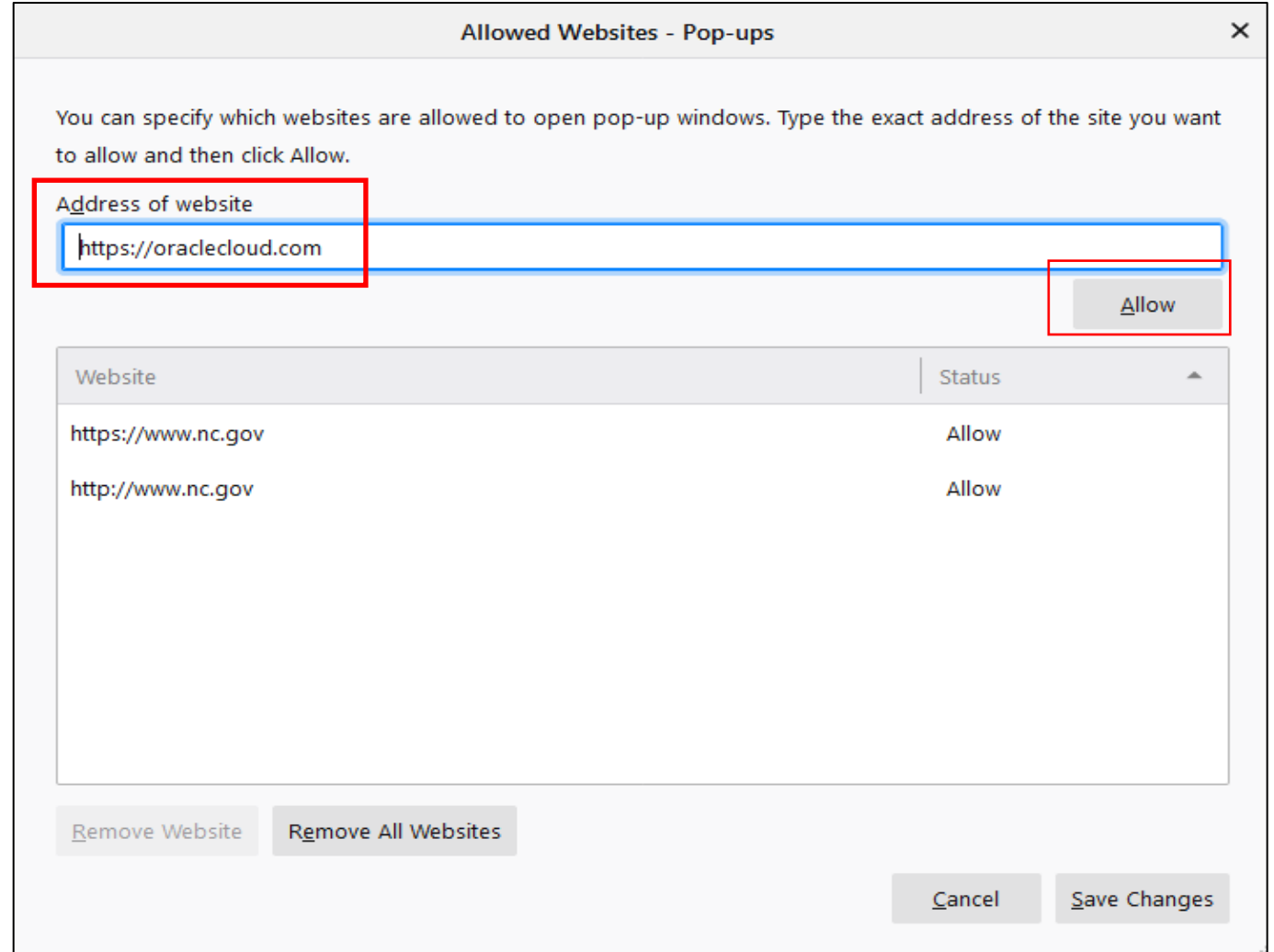


The screenshot shows the Firefox 'Permissions' settings page. The 'Block pop-up windows' option is checked, and its corresponding 'Exceptions...' button is highlighted with a red rectangle. Other permissions listed include Location, Camera, Microphone, Notifications, Autoplay, and Virtual Reality, each with a 'Settings...' button. The 'Warn you when websites try to install add-ons' option is also checked and has an 'Exceptions...' button. The 'Prevent accessibility services from accessing your browser' option is unchecked and has a 'Learn more' link.

Permission	Action
Location	Settings...
Camera	Settings...
Microphone	Settings...
Notifications <a href="#">Learn more</a>	Settings...
<input type="checkbox"/> Pause notifications until Firefox restarts	
Autoplay	Settings...
Virtual Reality	Settings...
<input checked="" type="checkbox"/> Block pop-up windows	Exceptions...
<input checked="" type="checkbox"/> Warn you when websites try to install add-ons	Exceptions...
<input type="checkbox"/> Prevent accessibility services from accessing your browser <a href="#">Learn more</a>	

# #4 - Firefox - Enabling Pop Ups

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

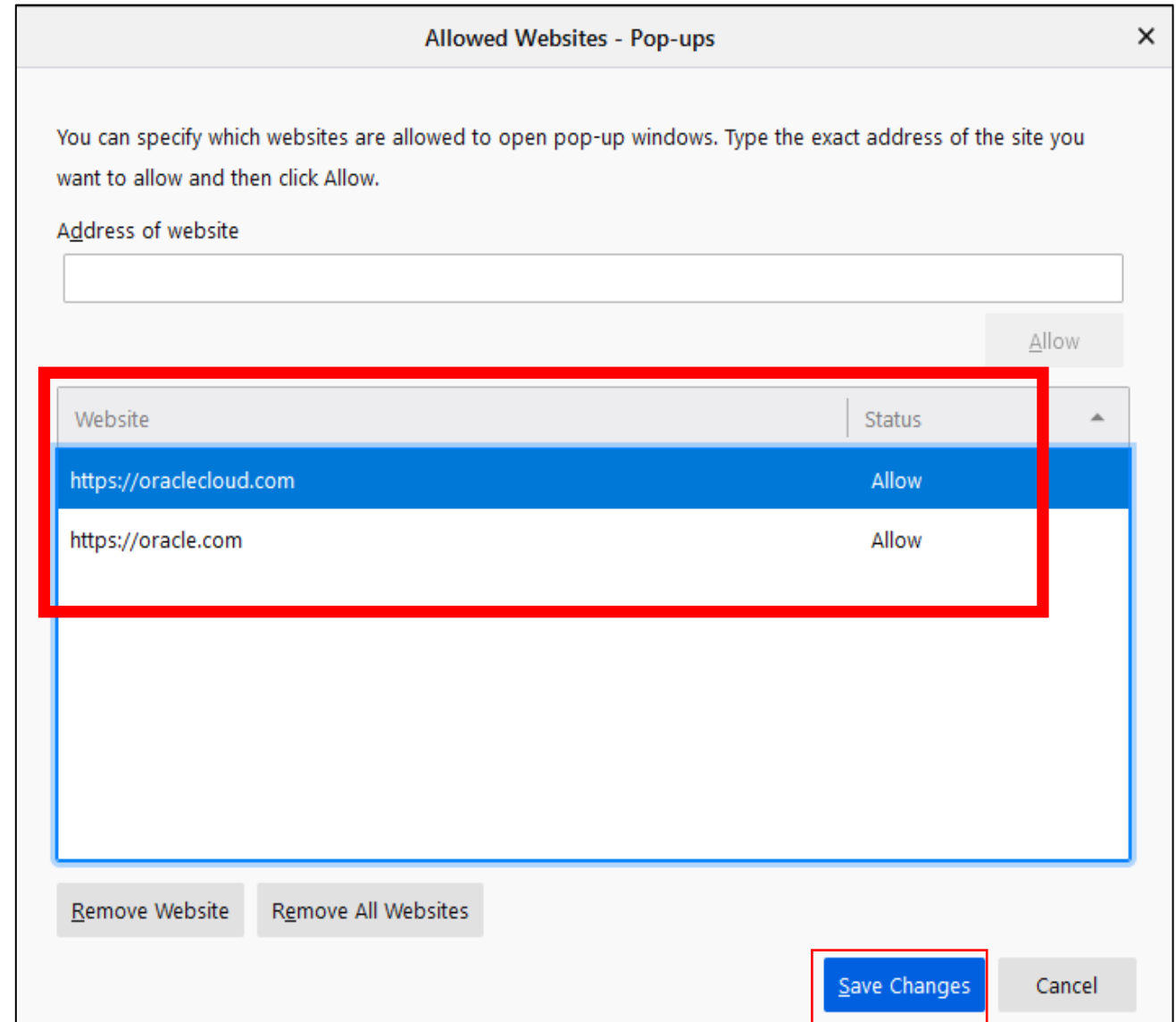


The screenshot shows the 'Allowed Websites - Pop-ups' dialog box in Firefox. The title bar reads 'Allowed Websites - Pop-ups'. Below the title bar, there is a text area with the instruction: 'You can specify which websites are allowed to open pop-up windows. Type the exact address of the site you want to allow and then click Allow.' Below this text is a text input field labeled 'Address of website' containing the URL 'https://oraclecloud.com'. To the right of the input field is an 'Allow' button. Below the input field and button is a table with two columns: 'Website' and 'Status'. The table contains two rows: one for 'https://www.nc.gov' with status 'Allow', and one for 'http://www.nc.gov' with status 'Allow'. At the bottom of the dialog, there are four buttons: 'Remove Website', 'Remove All Websites', 'Cancel', and 'Save Changes'.

Website	Status
https://www.nc.gov	Allow
http://www.nc.gov	Allow


# #4 - Firefox - Enabling Pop Ups

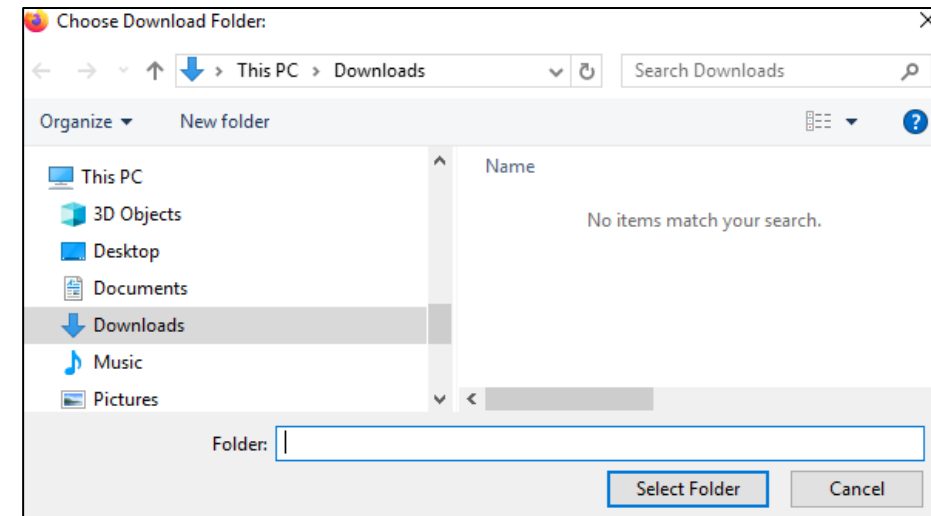
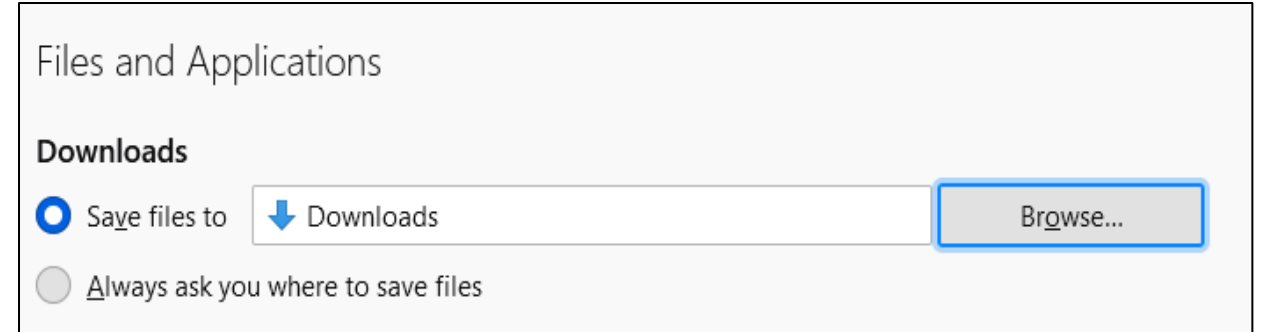
8. Now the site <https://oraclecloud.com> and <https://oracle.com> should show in the list.
9. Click “Save Changes” button and exit.





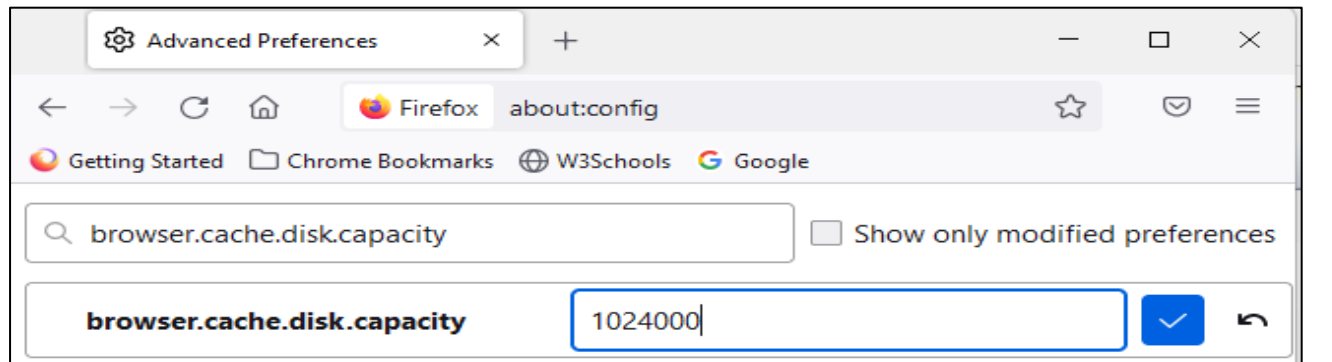
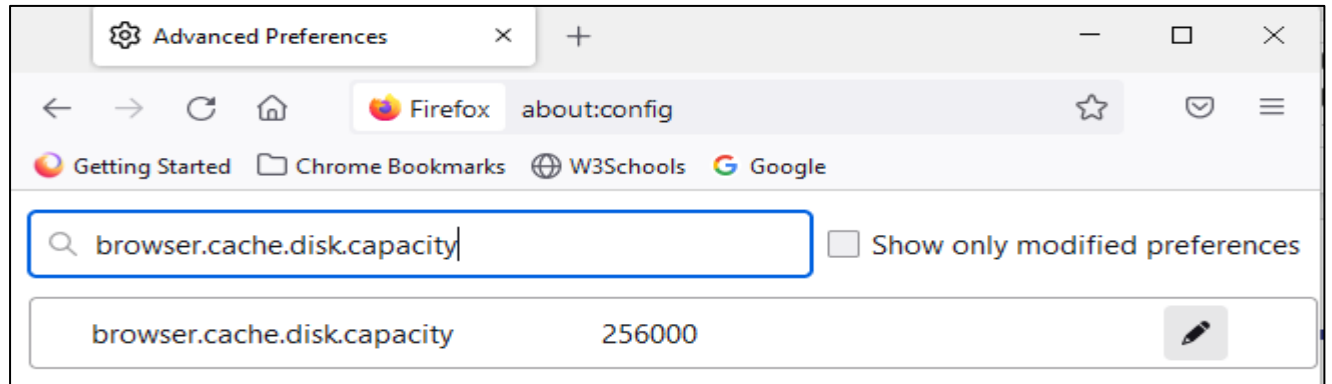
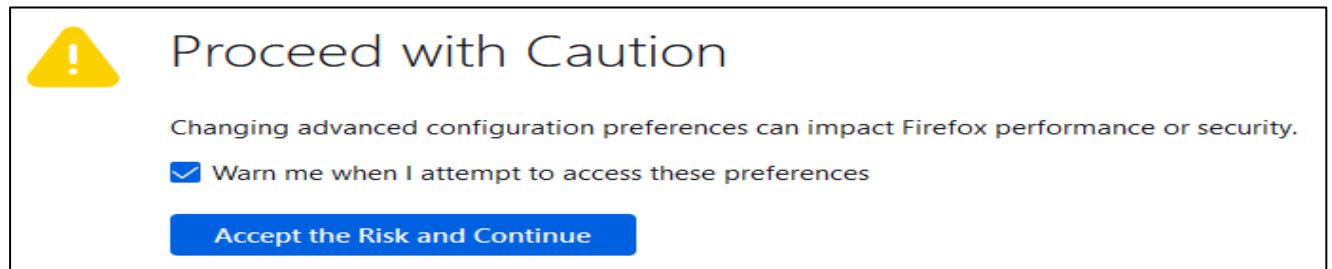
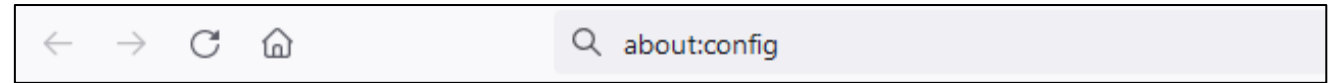
# #4 - Firefox - Downloads

1. Click on Menu icon  on top right corner and select "Settings".
2. Scroll down to "Files and Application" Section.
3. Make sure "Always ask you where to save files" is not checked, "Save Files To" is checked and folder name is "Downloads".
4. You can select the "Downloads" folder by clicking on the "Browse" button.



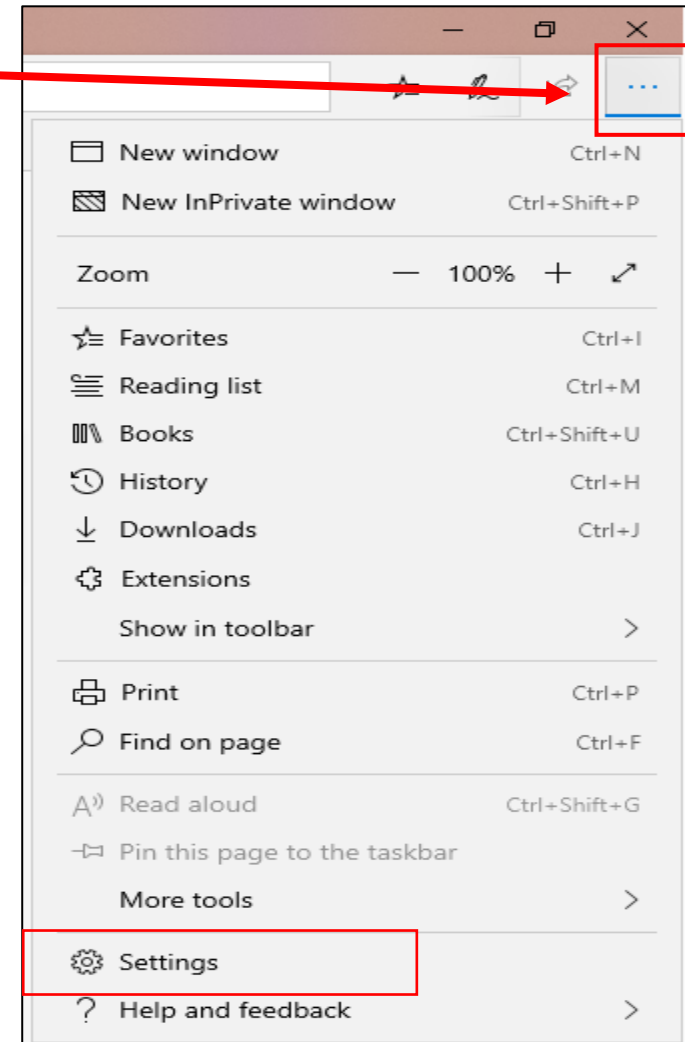
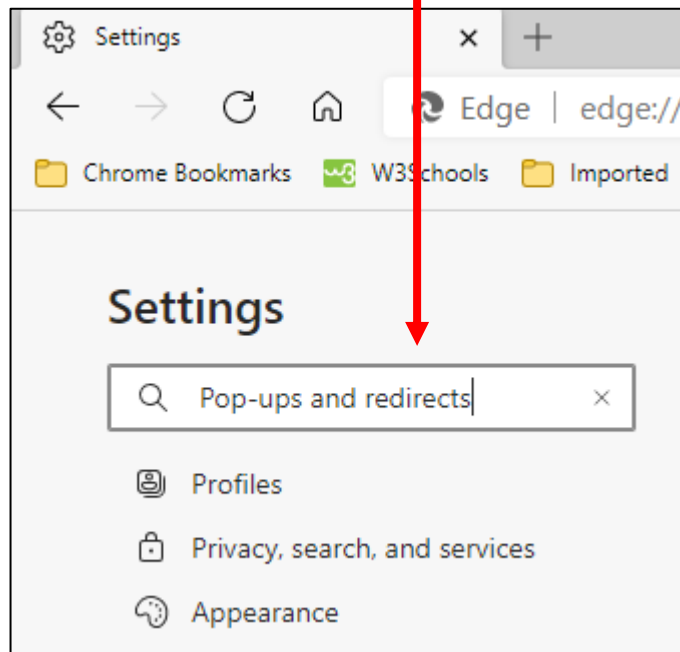
# #4 - Firefox - Set Disk Cache Size to 1024MB

1. Open the Firefox browser.
2. Type about:config into the address bar.
3. Hit Enter.
4. Click on “Accept the Risk and Continue”.
5. In the Search Window type browser.cache.disk.capacity
6. Hit Enter.
7. Click on the Pencil icon to edit.
8. Type in 1024000.
9. Click the Checkbox.
10. Close and restart the browser.



# #4 - Edge - Enabling Pop Ups

1. Click on three dots on top right corner and select "Settings".
2. In Search enter "Pop-ups and redirects".

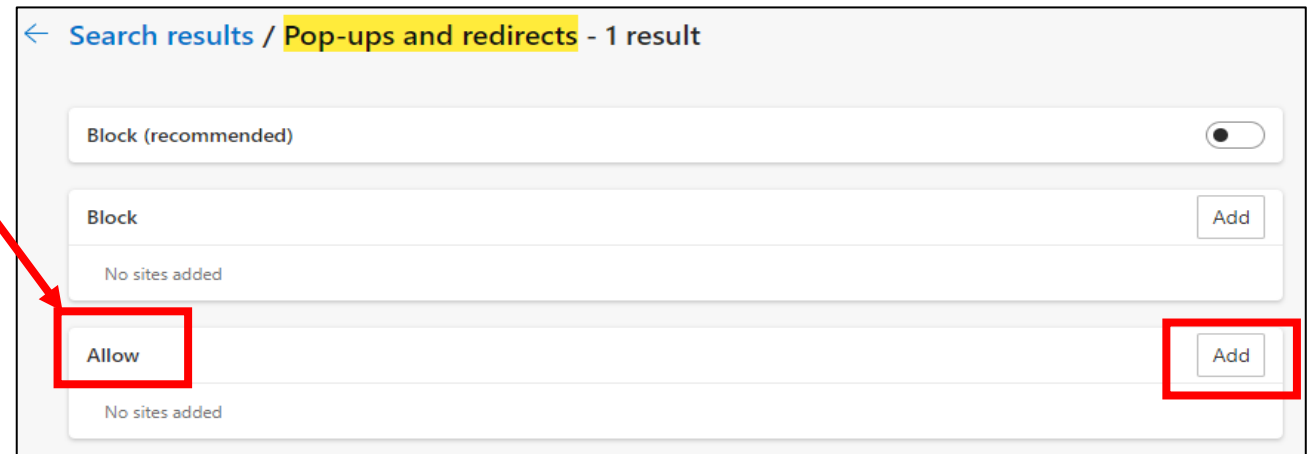


# #4 - Edge - Enabling Pop Ups

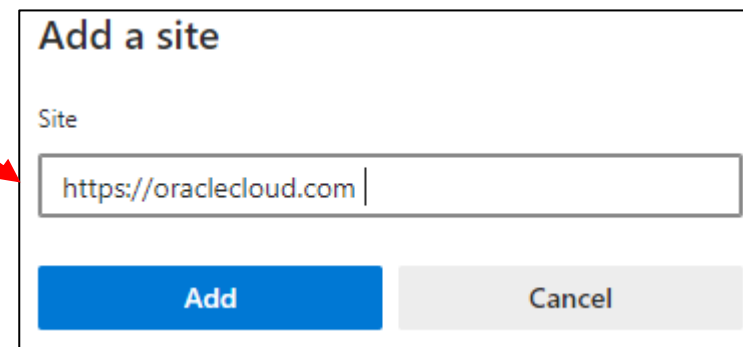
3) Click on "Pop-ups and redirects".



4) Click on the "Add" button under allow.

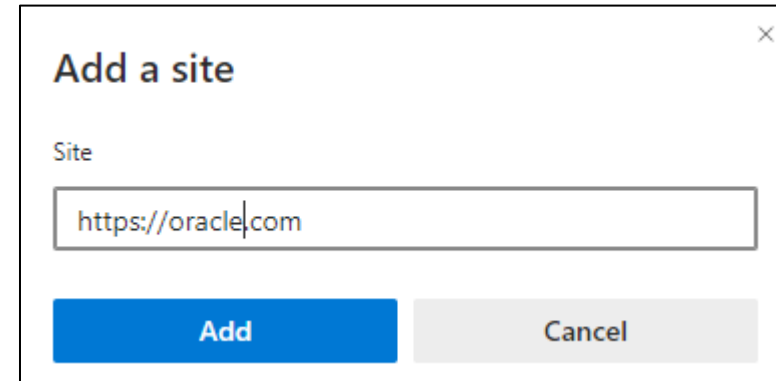


5) Add website <https://oraclecloud.com> and click "Add" button.



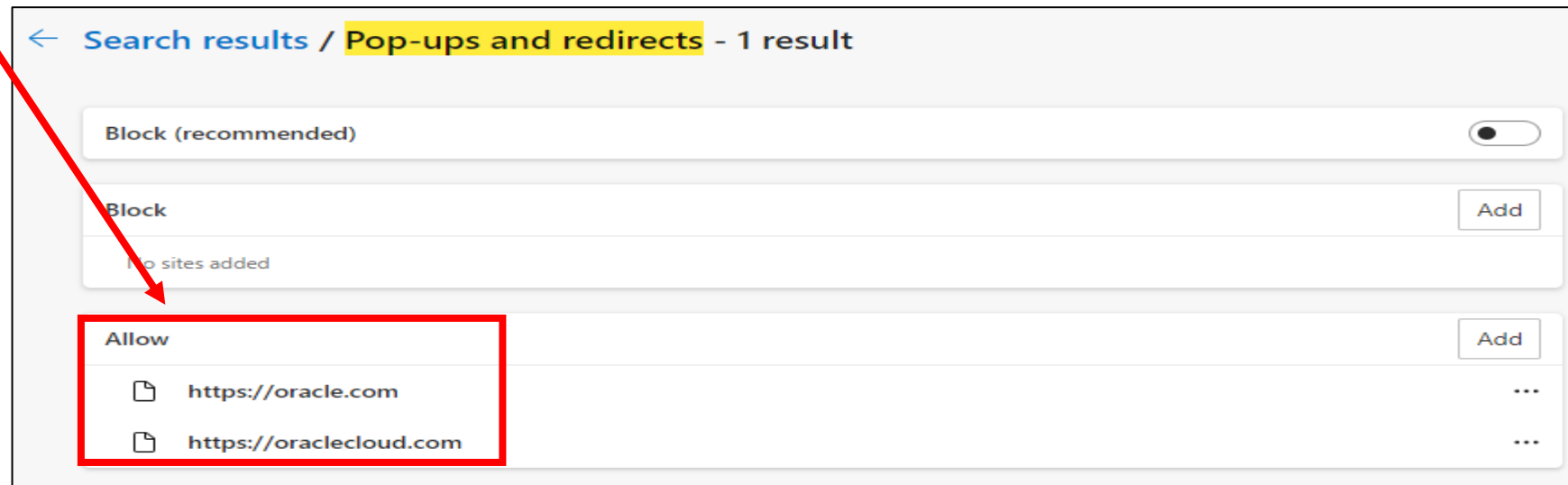
# #4 - Edge - Enabling Pop Ups

6) Add website <https://oracle.com> and click "Add" button.



The screenshot shows a dialog box titled "Add a site" with a close button (X) in the top right corner. Below the title is a label "Site" followed by a text input field containing the URL "https://oracle.com". At the bottom of the dialog are two buttons: a blue "Add" button and a grey "Cancel" button. A red arrow from the text above points to the "Add" button.

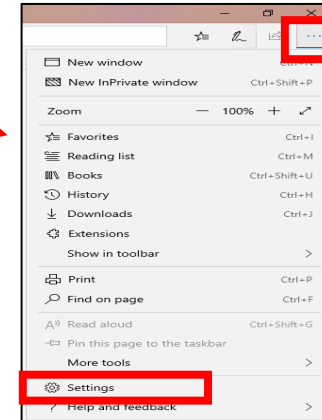
7) Now the site <https://oraclecloud.com> and <https://oracle.com> should show under Allow.



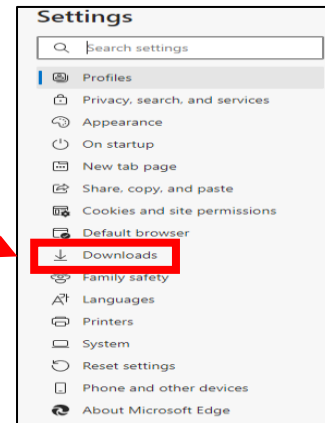
The screenshot shows the "Pop-ups and redirects" settings page in Microsoft Edge. The page title is "Search results / Pop-ups and redirects - 1 result". At the top, there is a toggle switch for "Block (recommended)" which is currently turned off. Below this, there are two sections: "Block" and "Allow". The "Block" section has an "Add" button and the text "No sites added". The "Allow" section is highlighted with a red box and contains two entries: "https://oracle.com" and "https://oraclecloud.com", each with a document icon and a three-dot menu icon to its right. A red arrow from the text above points to the "Allow" section.

# #4 - Edge - Downloads

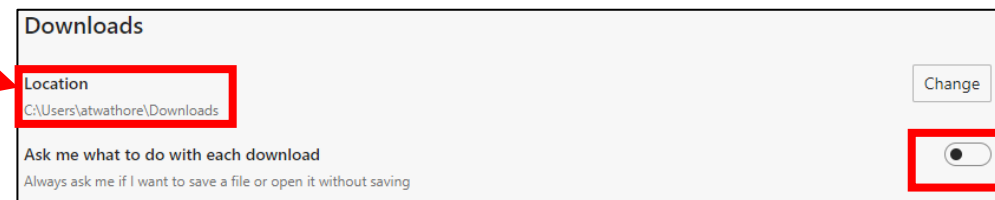
1) Click on three dots on top right corner, 2) Select "Settings".



2) Click on "Downloads".



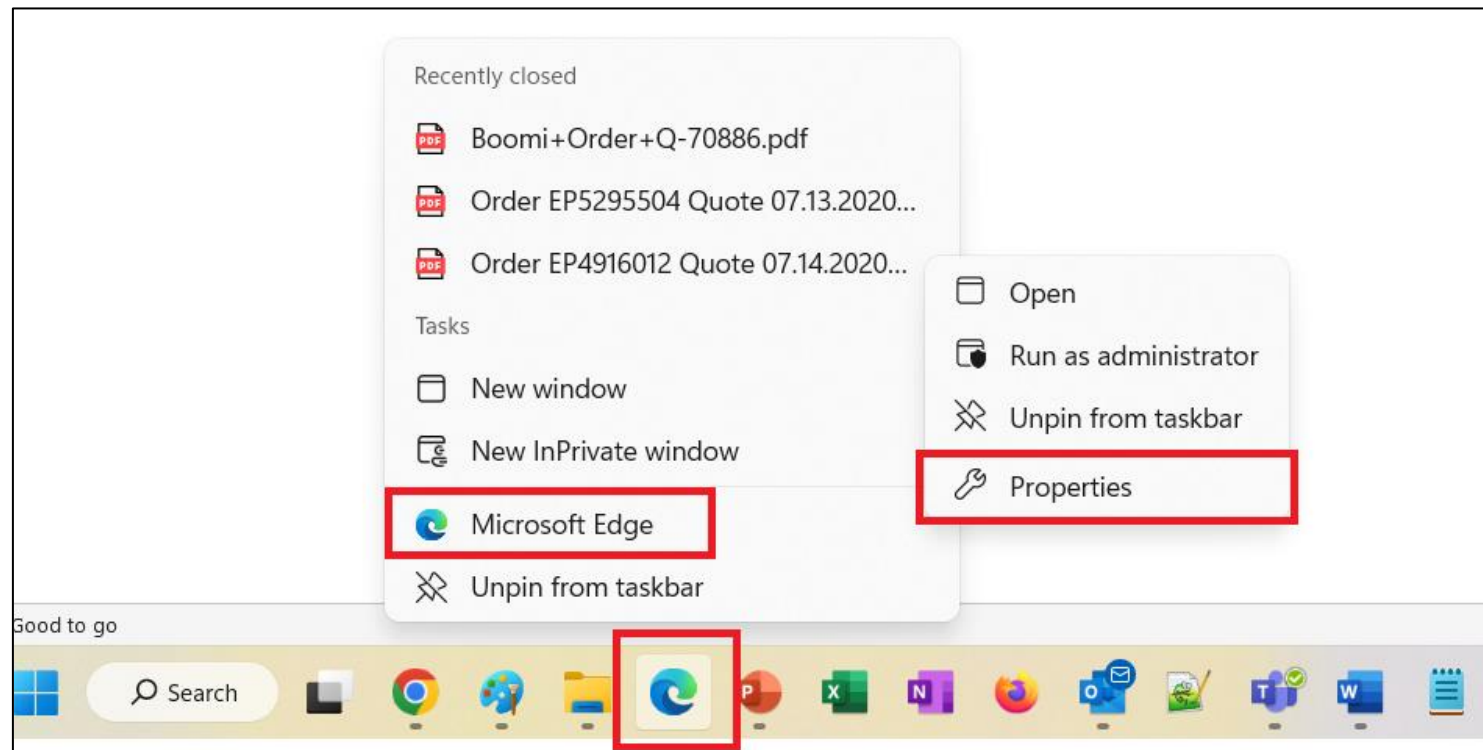
3) Make sure directory shown on the location is "C:\Users\your userid\Downloads" If it is not, click on Change button to select Downloads folder.



4) Also make sure "Ask me what to do with each download" is turned off.

## #4 - Edge - Set Disk Cache Size to 1024MB

1. Go to your Desktop. Right Click on the Edge icon in desktop. Select Properties.
2. If you don't have Edge icon on Desktop, then right click on Edge icon on toolbar at the bottom of laptop and Edge icon will appear in a window. Right click on that Edge icon and Select properties.



## #4 - Edge - Set Disk Cache Size to 1024MB

3. Click on Shortcut Tab. Click on the Target Box and scroll to right.

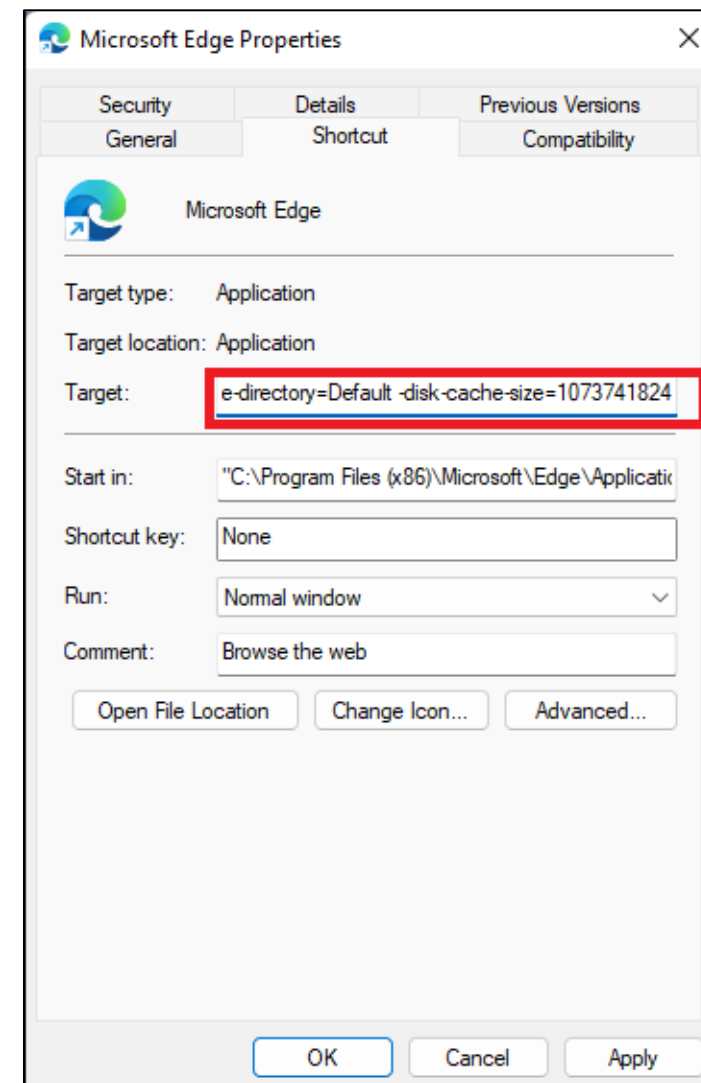
4. At the end of the Target box add `-disk-cache-size=1073741824`.

It should look like this

- `".....\msedge.exe" --profile-directory=Default -disk-cache-size=1073741824`

5. Click "OK"

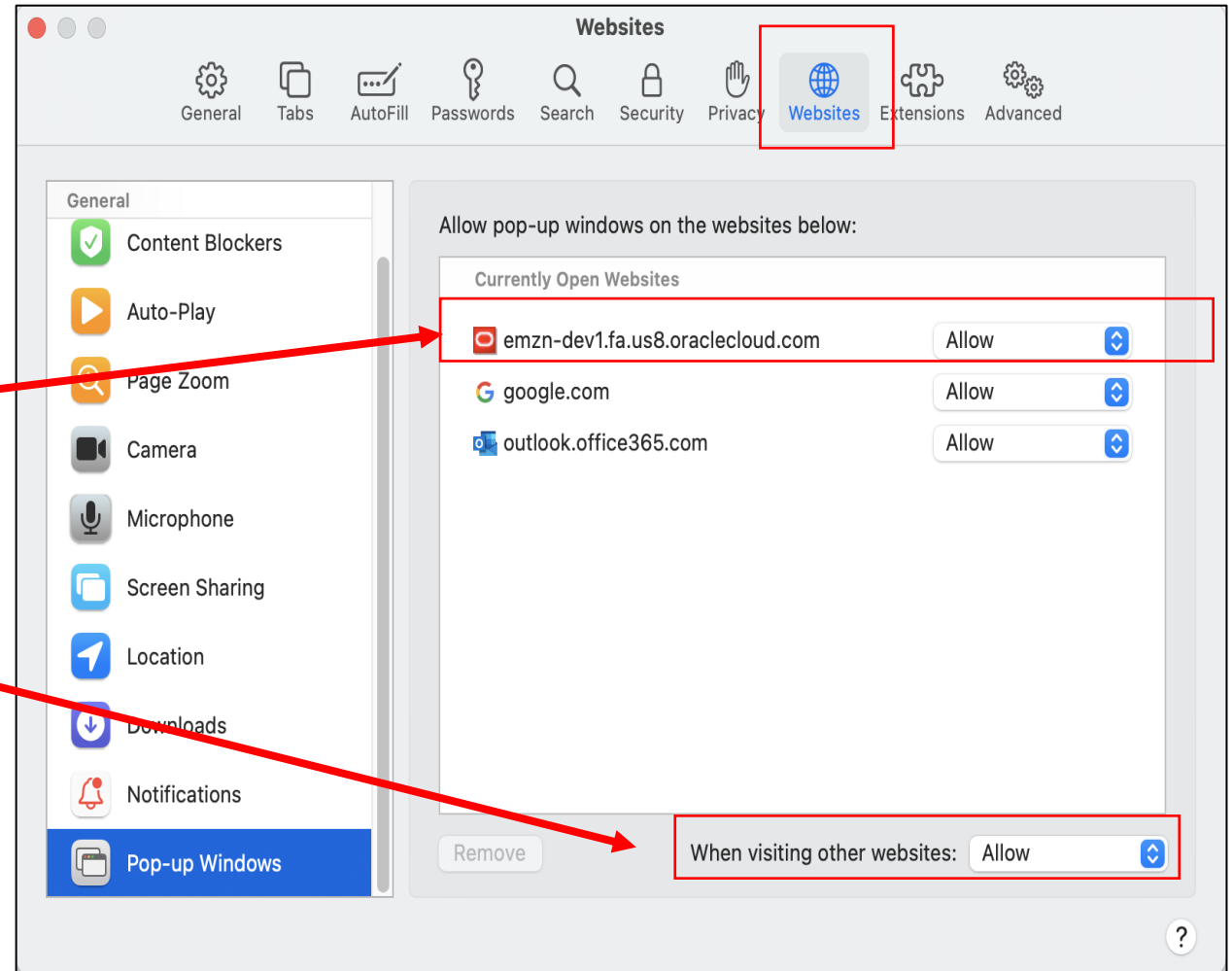
6. Close the browser and restart the browser.





# #4 - Safari - Enabling Pop Ups

1. Open Safari Browser and click on > Safari > Settings
2. Click on "Website" Tab.
3. IF you are already in Oracle application, then click on that application(s) and select "Allow"
4. At bottom right corner click on "When visiting other websites" and select "Allow".



## #4 - Safari – Downloads and Cache Size

---

- In Safari, the Downloads are automatically stored in “Downloads” folder. No action is required.
- As per Oracle you don’t have to set Disk Cache size for Safari.

# #5 - Enabling browser auto update

---

- Browser update for Chrome, Firefox, and Edge is controlled your Desktop team, there is no action required on your part.
- To Update Safari
  - Go to Apple menu > System Preferences.
  - Click on “Software Update”.
  - If you want to keep Safari up to date, check the “Automatically keep my Mac up to date” box in Software Update.

# #6 - Install Oracle Excel Plugin

- Please note that everyone does not need an Excel Plugin.
- If your role requires you to upload transactions in NCFS using Excel, then you need an Excel Plug-in called "ADFDi"
- You must use Microsoft Windows for Excel uploads. You cannot use iOS(Apple) for Excel based uploads.

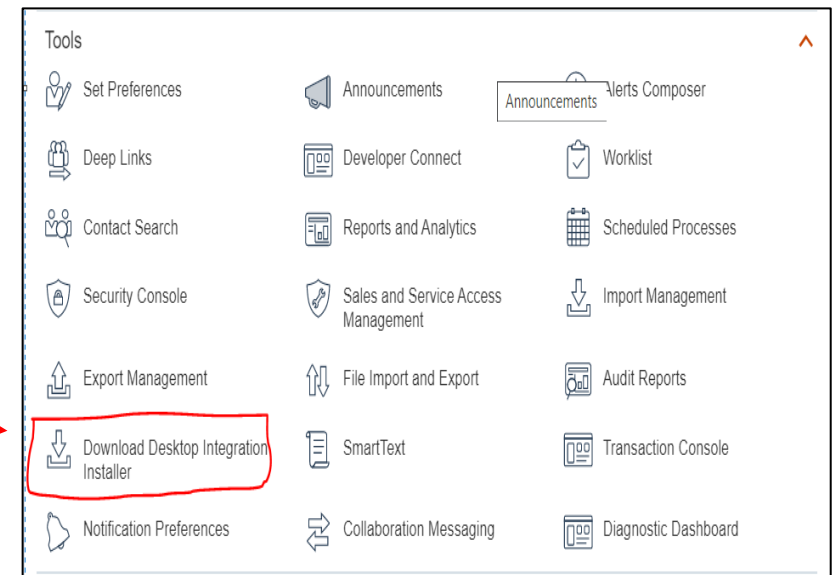
## There are two ways to download Excel Plugin

1) Go to OSC NCFS website - <https://www.osc.nc.gov/state-agency-resources/north-carolina-financial-system-ncfs-resources>

- Unzip the file. Double click to run the "adfdi-excel-addin-installer.exe" file
- Click "Install".

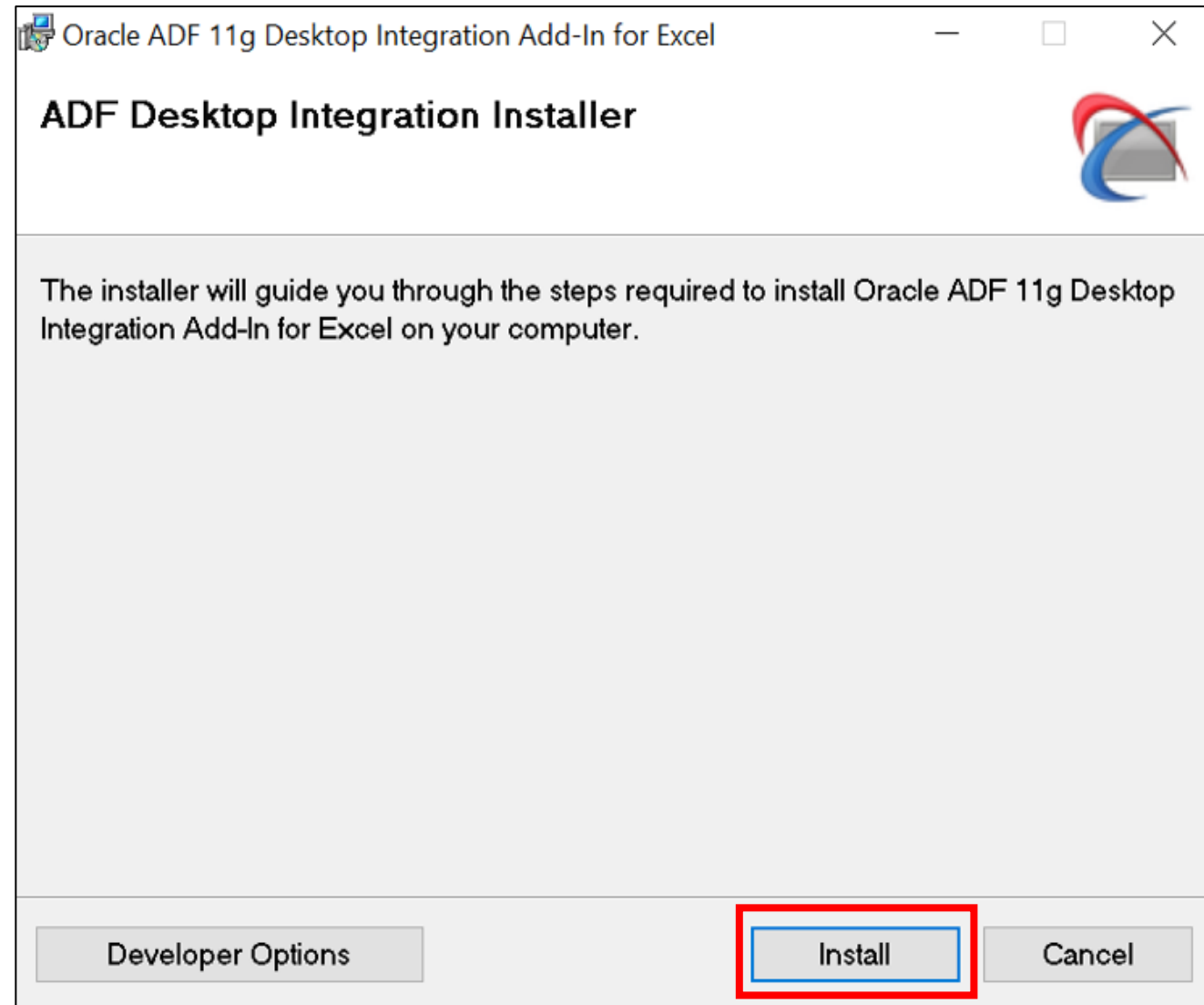
2) From NCFS Oracle Application

- Log in NCFS Oracle application.
- Click on the Menu icon on top left.
- Expand "Tools" Section
- Click "Download Desktop Integration Installer"



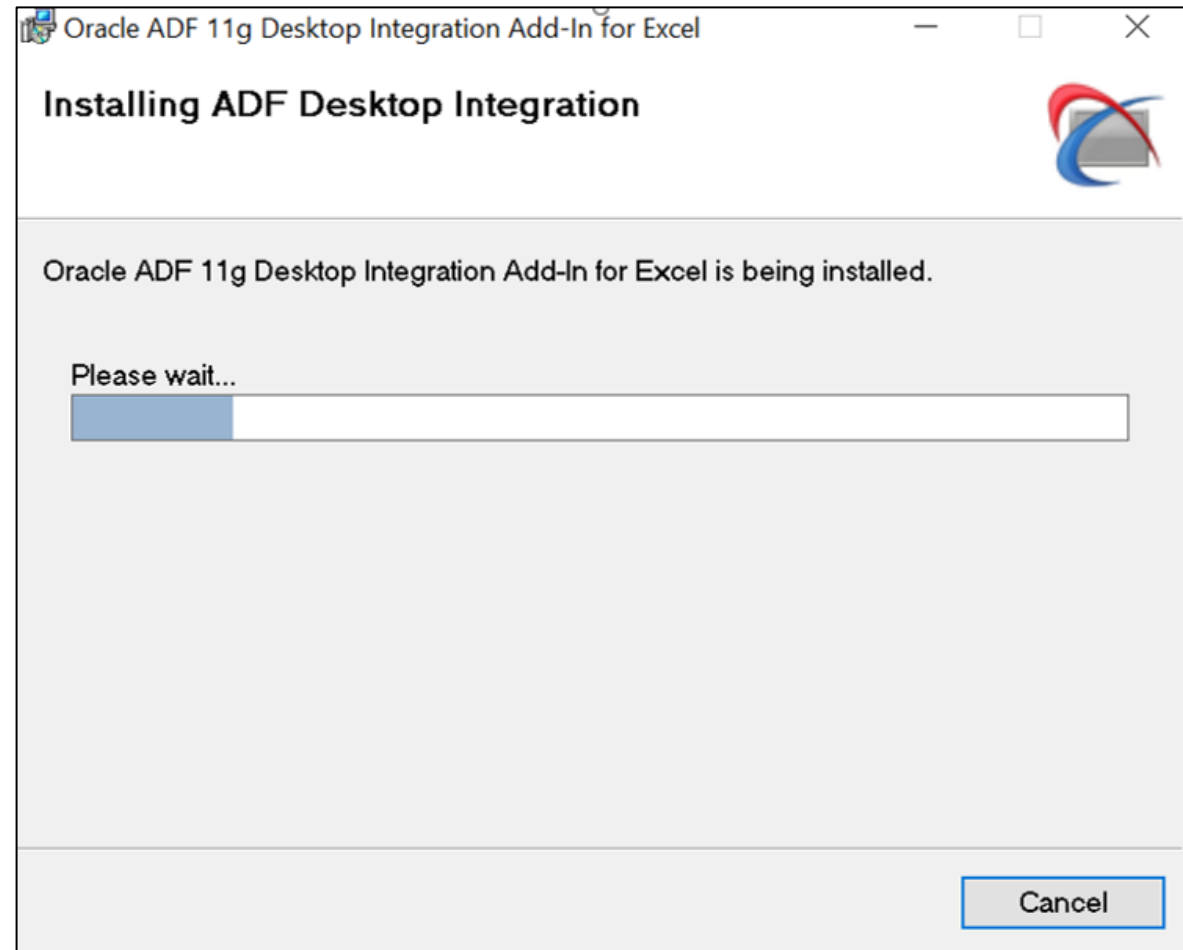
# #6 - Install Oracle Excel Plugin

1. Close all Microsoft Excel instances prior to downloading the executable.
2. 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>.
3. Unzip the file. Double click to run the "adfdi-excel-addin-installer.exe" file.
4. Click "Install".



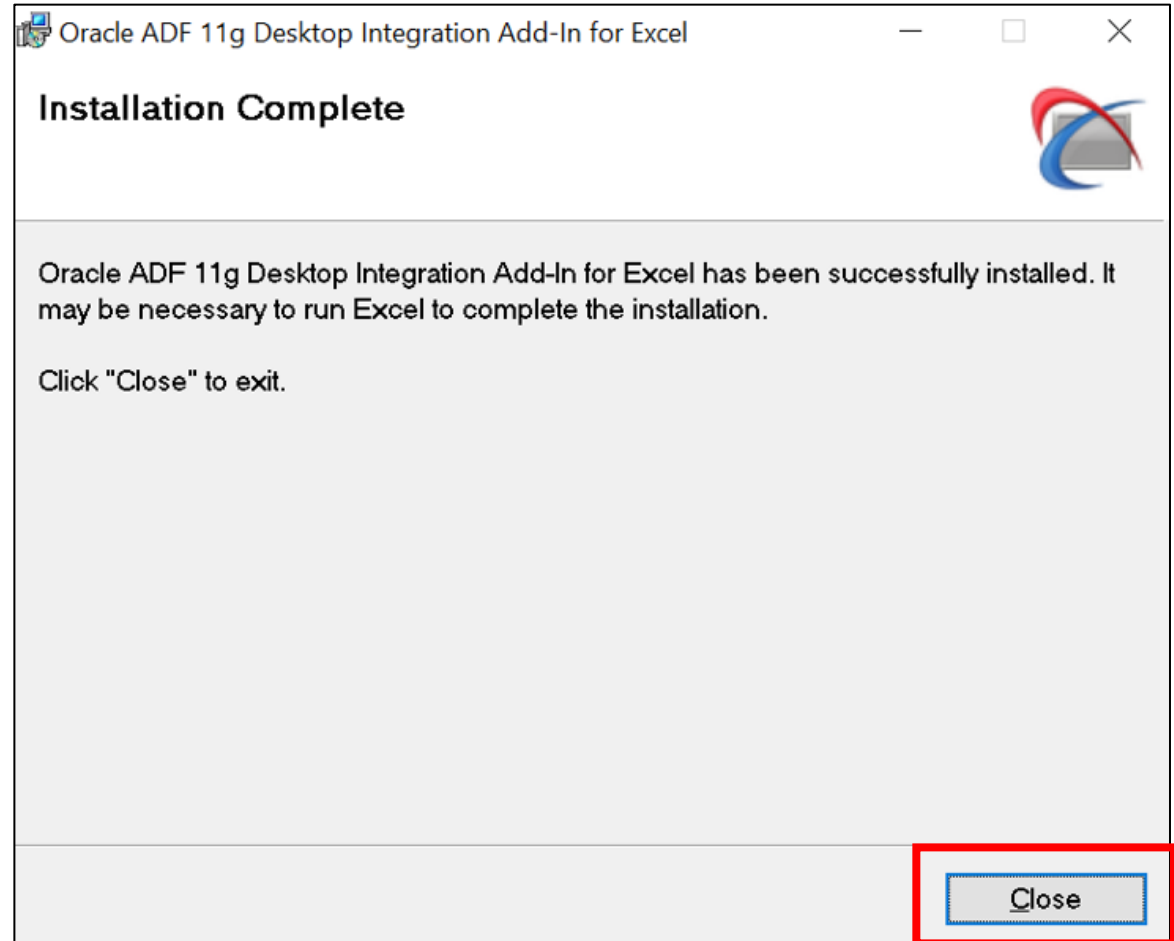
# #6 - Install Oracle Excel Plugin

5. You see the process bar as the desktop integration installs on your machine.



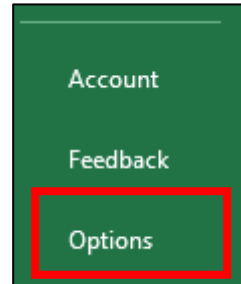
# #6 - Install Oracle Excel Plugin

6. Once the process is completed, you see the "Installation Complete" message.
7. Click "Close".



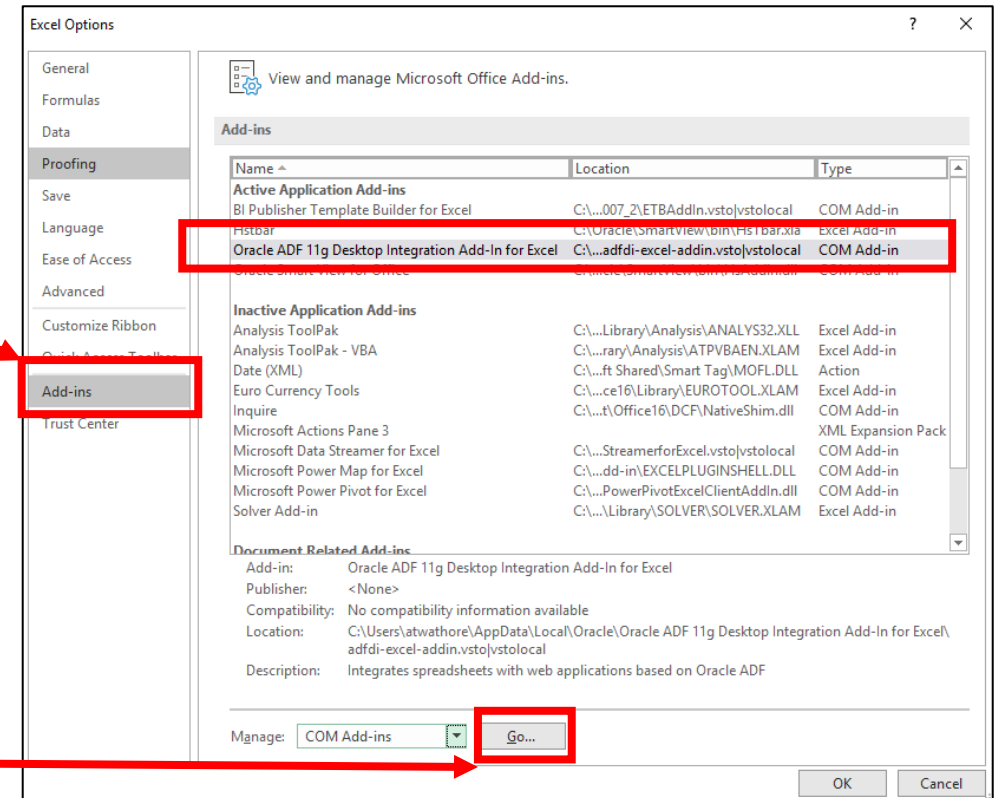
# #6 - Install Oracle Excel Plugin

8. Open an empty Excel file and click on File > Options.



9. Click on "Add-ins".

10. Make sure you can see "Oracle ADF 11g Desktop Integration Add-In for Excel" is in the list. **This means, the Excel plug in is installed.**



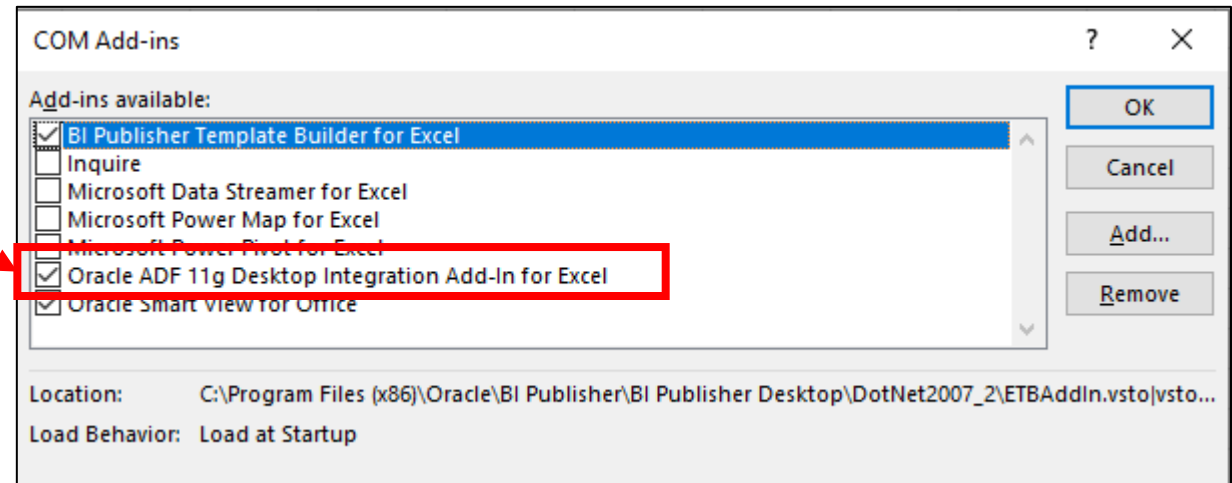
11. Select "COM Add-ins" in the Manage dropdown.

12. Click "Go".



# #6 - Install Oracle Excel Plugin

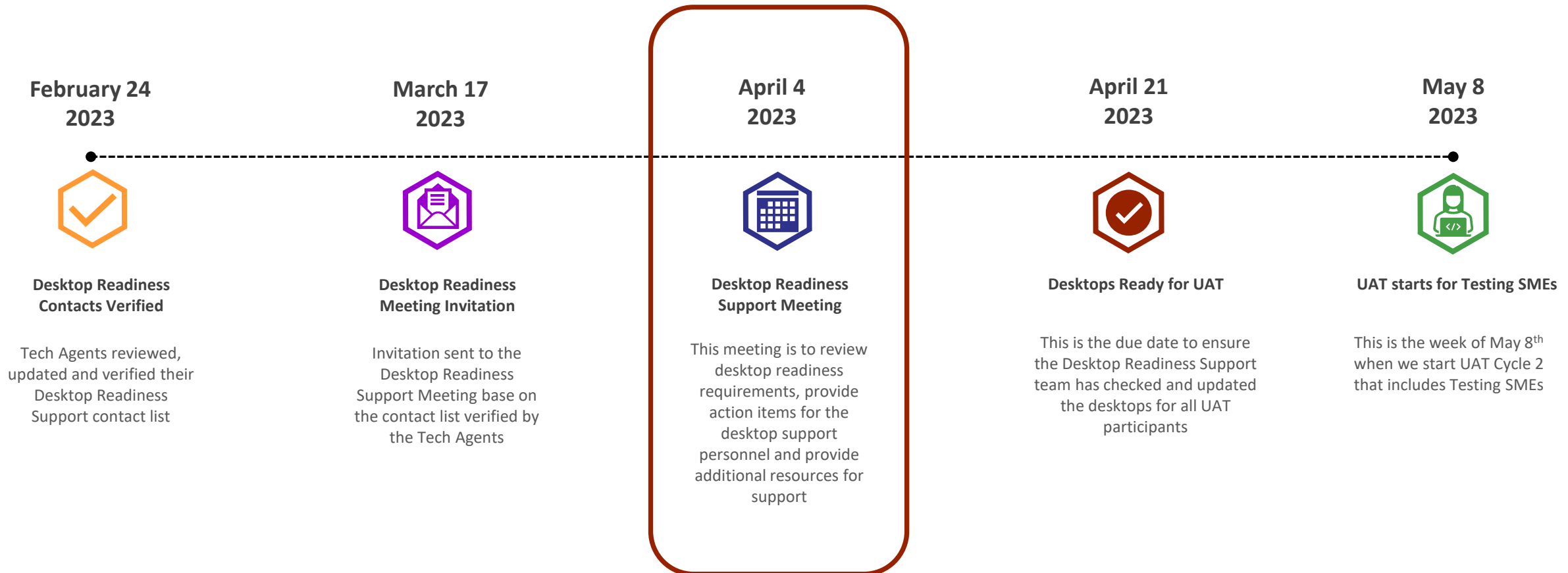
13. Make sure “Oracle ADF 11g Desktop Integration Add-In for Excel” Add-in is checked. **This means, the Excel plugin is enabled for use.**



# Next Steps

---

# Desktop Readiness – Important Dates



# Track desktop readiness using Dynamic View (DV)

- Use the DV to keep track of SMEs you have completed
- Communicate with your PC and Tech Agent if adjustments to the list or needed

☆ AGR - R3 Desktop Readiness SMEs ⓘ

▼ Filter [Icons]

Completed Desktop Readiness	Contact	Email	Test & Train SME for Desktop Readiness Due 4/21/23	Testing SMEs for Desktop Readiness Due 4/21/2	Training SMEs for Desktop Readiness Due 6/26/23
<input type="checkbox"/>	DANA WHEELER	DANA.WHEELER@NCAGR.GOV	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CARRIE STICKLIN	CARRIE.STICKLIN@NCAGR.GOV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	JEFF WITHEROW	JEFF.WITHEROW@NCAGR.GOV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	JILL AMERICK	JILL.AMERICK@NCAGR.GOV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	MELINDA GREEN	MELINDA.GREEN@NCAGR.GOV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ANDY MCKINNEY	ANDY.MCKINNEY@NCAGR.GOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CATHERINE STOGNER	CATHERINE.STOGNER@NCAGR.GOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HEATHER BRUCE	HEATHER.BRUCE@NCAGR.GOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	MELISSA GRAY	MELISSA.GRAY@NCAGR.GOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>