

# OAKS CI Training Guide – First Time User Setup

## State of Ohio Standard Forms and Documents

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### Configuring Your Computer to Use the OAKS CI Application

This document contains job aids to assist you in the configuration of your computer to properly use the OAKS CI application. Each computer that will be utilizing the OAKS CI application will need to use the Sun Java, Internet Explorer Configuration (the job aid used will depend on the version of Internet Explorer installed on the computer).

#### Sun Java

**(IF YOU KNOW THAT YOU ALREADY HAVE SUN JAVA ON YOUR DESKTOP, GO TO PAGE 3)**

1. Click on **Start** and go to **Settings**, then click on **Control Panel**. If you do not see **Settings** in your start menu, just click on **Control Panel**.
2. Double-click on **Add or Remove Programs**. If you do not see **Add or Remove Programs**, click on Switch to Classic View in the left-hand window pane. Then double-click on **Add or Remove Programs**.
3. Look for the installed versions of Java. Sun Java, **any** version after Sun Java 5 and up to Sun Java 6 version 22 is acceptable.

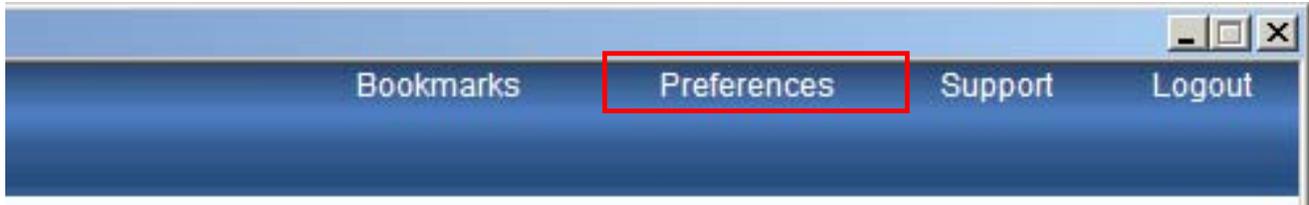
*Note: If you do not have Sun Java on your PC.*

4. Java JRE releases after Update 22 have not yet been certified for use with Unifier. If you have an unsupported version installed, it is recommended that you uninstall your JRE and reinstall one of the supported versions. You can find prior versions at:  
<http://www.oracle.com/technetwork/java/archive-139210.html>.

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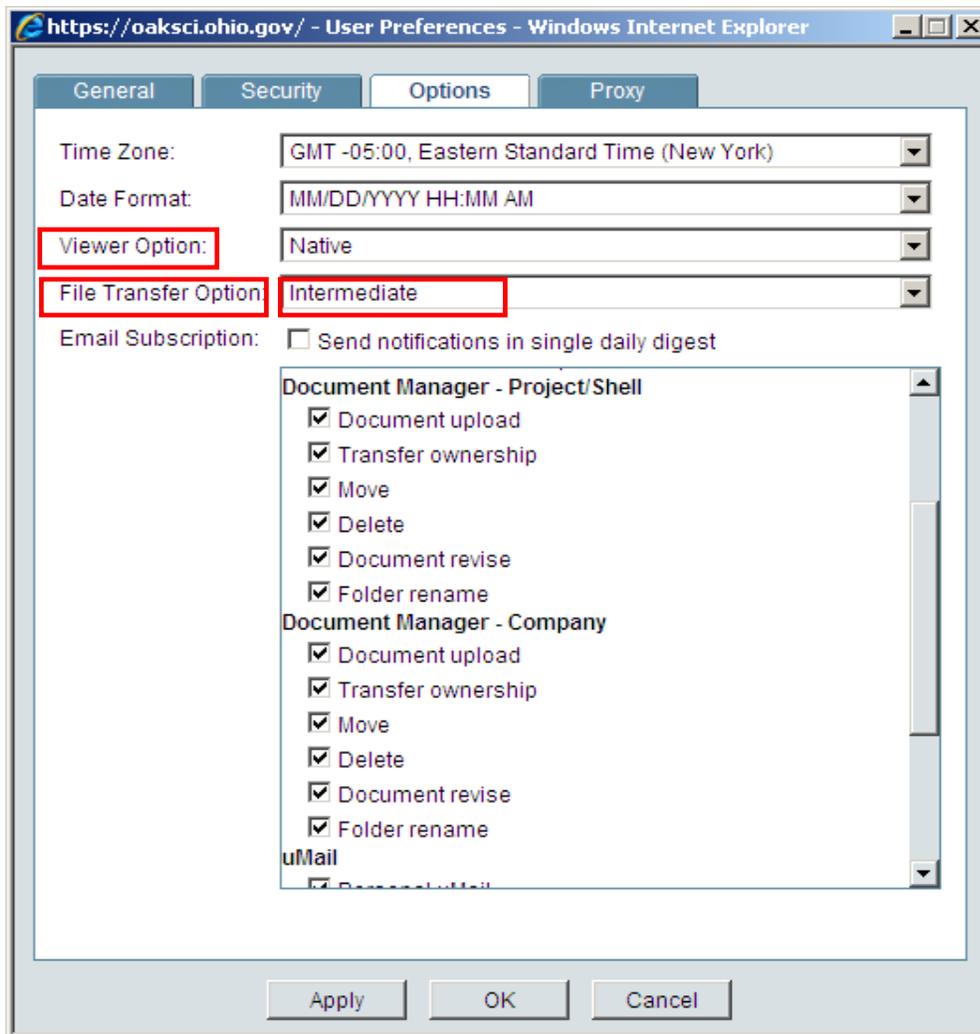
**After** completing the IE6,7 or 8/9 instructions and once you have logged onto OAKS CI, complete the below steps:

**Click on Preferences on the top right hand corner of the Cross Project Home Page**



**Click Options**

**Format your Viewer Option, File Transfer Option and Document Manager information to reflect what is shown below in the example:**

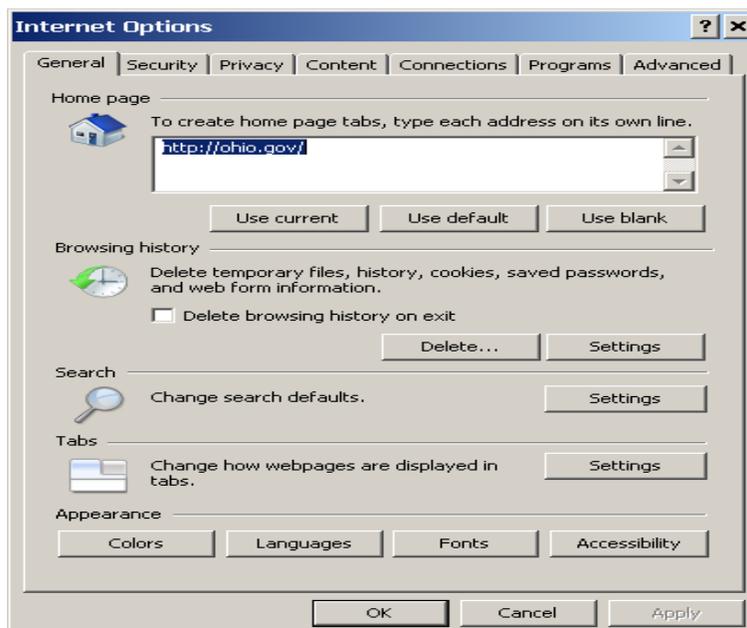


## OAKS CI Training Guide – First Time User Setup

### Configuring the Internet Explorer 6 Browser (IE 7 go to pg.6, IE 8 go to pg.8, IE 9 go to pg.10)

Unifier runs in an Internet Explorer browser window. This document outlines the settings within Internet Explorer that need to be configured in order for Unifier to run successfully. This setup must be performed for each computer on which you will be running Unifier. When you have finished configuring the computer, **log out of Unifier and close the browser completely for the new settings to take effect.**

1. Open Internet Explorer.
2. From the browser menu bar, click **Help** and choose **About Internet Explorer**.
3. Verify your browser version.
4. Click the **Tools** dropdown menu and select **Internet Options**.



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The table below summarizes the settings in the Internet Options window. When you have configured Internet Explorer 6 with the following options, **close the browser and restart your computer.**

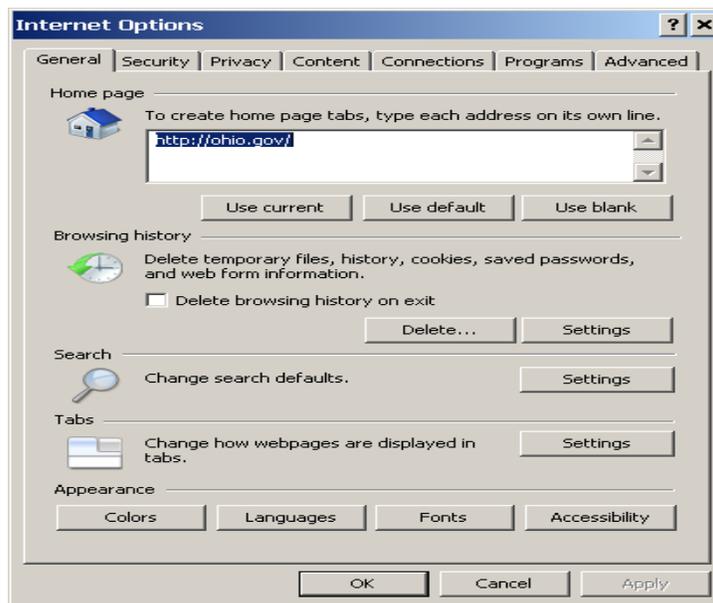
| In this tab | Do this   | Choose this setting   |
|-------------|---|---|
| General     | Under Temporary Internet files, click the Settings button to open the Settings window.  | <ul style="list-style-type: none"> <li>Choose <i>Every visit to the page</i></li> <li>Amount of disk space to use: <i>1000MB or higher (up to 3200)</i></li> </ul>  |
|             | Under Temporary Internet files, click the Delete Files button to open the Delete Files window.  | <ul style="list-style-type: none"> <li>Select <i>Delete all offline content (do this regularly to clear the cache).</i></li> </ul>  |
| Security    | For the “zone,” click: <ul style="list-style-type: none"> <li>Trusted Sites</li> <li>Click the Sites button. Under Websites to add to this zone type <code>https:// *.ohio.gov</code> and click Add to add as a Trusted Site.</li> </ul> Then go to the bottom of the screen and Click Custom Level | Scroll down the list and choose the following settings: <ul style="list-style-type: none"> <li>Automatic prompting for file downloads: <i>Enable</i></li> <li>File download: <i>Enable</i></li> <li>Use Pop-up Blocker: <i>Enable</i></li> <li>Allow script-initiated windows to open without size or position constraints: <i>Enable</i></li> <li>Display mixed content: <i>Enable or Prompt</i></li> </ul>  |
|             | Click the Custom Level button to open the Security Settings window.   | At the bottom of the window: <ul style="list-style-type: none"> <li>Reset custom settings/Reset to (dropdown menu): select <i>Medium</i></li> </ul>   |
| Privacy     | On the Privacy tab:   | <ul style="list-style-type: none"> <li>Move the Privacy Settings slide to <i>Medium</i></li> <li>Under Pop-up Blocker, select <i>Block pop-ups</i></li> </ul>   |
| Advanced    | On the Advanced tab:  | Scroll down the list and do the following: <ul style="list-style-type: none"> <li><i>Deselect</i> “Use JRE [version no.] for &lt;applet&gt; (If you will be running Custom Reports, i.e. Crystal Reports, you will need to Select this option.</li> <li><i>Select</i> “Empty Temporary Internet Files Folder when browser is closed”</li> <li><i>Deselect</i> “Do not save encrypted pages to disk”</li> <li><i>Select</i> “Enable Integrated Windows Authentication”</li> <li><i>Select</i> “Use SSL 2.0”</li> <li><i>Select</i> “Use SSL 3.0”</li> <li><i>Deselect</i> “Use TLS 1.0”</li> </ul> |

# OAKS CI Training Guide – First Time User Setup

## Configuring the Internet Explorer 7 Browser

Unifier runs in an Internet Explorer browser window. This document outlines the settings within Internet Explorer that need to be configured in order for Unifier to run successfully. This setup must be performed for each computer on which you will be running Unifier. When you have finished configuring the computer, **log out of Unifier and close the browser completely for the new settings to take effect.**

1. Open Internet Explorer.
2. Verify your browser version.
3. Click the **Tools** dropdown menu and select **Internet Options**.



## OAKS CI Training Guide – First Time User Setup

The table below summarizes the settings in the Internet Options window. When you have configured Internet Explorer 7 with the following options, **close the browser and restart your computer.**

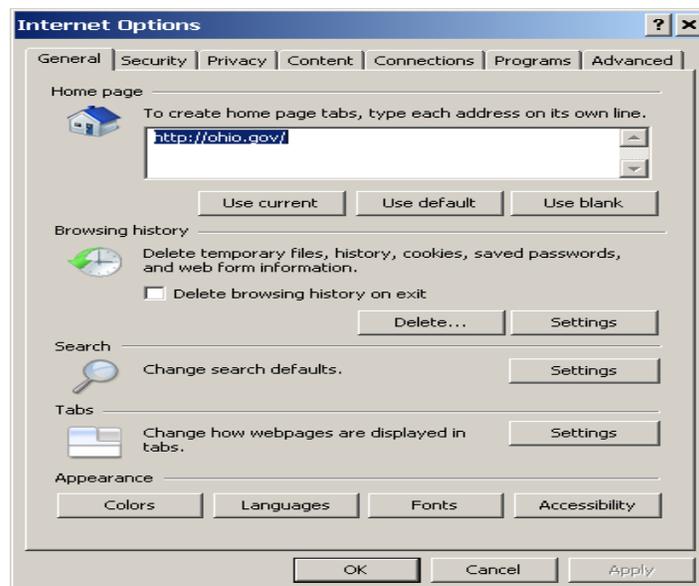
| In this tab | Do this  | Choose this setting   |
|-------------|--|---|
| General     | Under Browser History, click the Settings button to open the Settings window.  | <ul style="list-style-type: none"> <li>Choose <i>Every time I visit webpage</i></li> <li>Amount of disk space to use: <i>1000MB or higher</i></li> </ul>  |
|             | Under Browsing History, click the Delete Files button to open the Delete Browsing History window.  | <ul style="list-style-type: none"> <li>Under Temporary Internet Files, click the <i>Delete Files</i> button (do this regularly to clear the cache).</li> </ul>  |
|             | Under Tabs, click the Settings button.   | <ul style="list-style-type: none"> <li>Choose <i>Let Internet Explorer decide how pop-ups should open</i></li> </ul>  |
| Security    | <p>For the “zone,” click:</p> <ul style="list-style-type: none"> <li>Trusted Sites</li> <li>Click the Sites button. Under Websites to add to this zone type <i>https://*.ohio.gov</i> and click Add to add as a Trusted Site.</li> </ul> <p>Then go to the bottom of the screen and Click Custom Level</p> | <p>Click the Custom Level button to open the Security Settings window. Scroll down the list and choose the following settings:</p> <ul style="list-style-type: none"> <li>Automatic prompting for file downloads: <i>Enable</i></li> <li>File download: <i>Enable</i></li> <li>Allow script-initiated windows without size or position constraints: <i>Enable</i></li> <li>Allow websites to open windows without address or status bars: <i>Enable</i></li> <li>Display mixed content: <i>Enable or Prompt</i></li> <li>Use Pop-up Blocker: <i>Enable</i></li> </ul> <p>At the bottom of the window:<br/>Reset custom settings/reset to (dropdown menu): select: <i>Medium</i></p> |
| Privacy     | On the Privacy tab:  | <ul style="list-style-type: none"> <li>Move the Privacy Settings slide to <i>Medium</i></li> <li>Under Pop-up Blocker, select <i>Turn on Pop-up Blocker</i></li> </ul>  |
|             | Click the Settings button to open the Pop-up Blocker Settings window.  | <ul style="list-style-type: none"> <li>In Address of website to allow type <i>*.ohio.gov</i> and click <i>Add</i></li> <li>Filter level: set to <i>Medium: Block most automatic pop-ups</i></li> <li>Click Close.</li> </ul>  |
| Advanced    | On the Advanced tab:   | <p>Scroll down the list and do the following:</p> <p>Java:</p> <ul style="list-style-type: none"> <li><i>Deselect</i> “Use JRE [version no.] for &lt;applet&gt; (If you will be running Custom Reports, i.e. Crystal Reports, you will need to Select this option.</li> </ul> <p>Security</p> <ul style="list-style-type: none"> <li><i>Select</i> “Empty Temporary Internet Files Folder when browser is closed”</li> <li><i>Deselect</i> “Do not save encrypted pages to disk”</li> <li><i>Select</i> “Enable Integrated Windows Authentication”</li> <li><i>Select</i> “Use SSL 2.0”, <i>Select</i> “Use SSL 3.0”, <i>Deselect</i> “Use TLS 1.0”</li> </ul>                      |

# OAKS CI Training Guide – First Time User Setup

## Configuring the Internet Explorer 8 Browser

Unifier runs in an Internet Explorer browser window. This document outlines the settings within Internet Explorer that need to be configured in order for Unifier to run successfully. This setup must be performed for each computer on which you will be running Unifier. When you have finished configuring the computer, **log out of Unifier and close the browser completely for the new settings to take effect.**

1. Open Internet Explorer.
2. Verify your browser version.
3. Click the **Tools** dropdown menu and select **Internet Options**.



## OAKS CI Training Guide – First Time User Setup

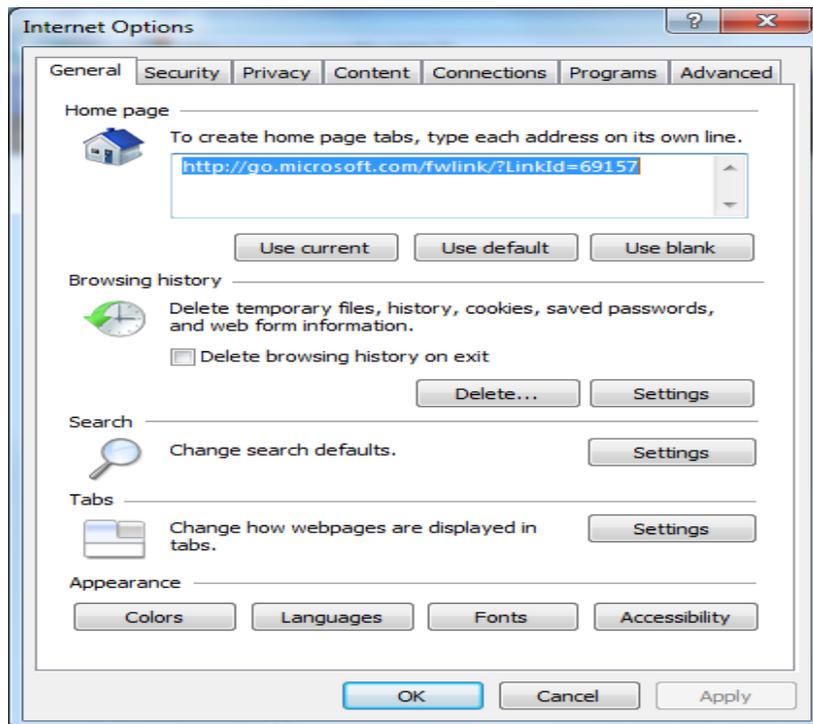
The table below summarizes the settings in the Internet Options window. When you have configured Internet Explorer 8 with the following options, **close the browser and restart your computer.**

| In this tab | Do this  | Choose this setting   |
|-------------|--|---|
| General     | Under Browser History, click the Settings button to open the Settings window.  | <ul style="list-style-type: none"> <li>Choose <i>Every time I visit webpage</i></li> <li>Amount of disk space to use: <i>1000MB or higher</i></li> </ul>  |
|             | Under Browsing History, click the Delete Files button to open the Delete Browsing History window.  | <ul style="list-style-type: none"> <li>Under Temporary Internet Files, click the <i>Delete Files</i> button (do this regularly to clear the cache).</li> </ul>  |
|             | Under Tabs, click the Settings button.   | <ul style="list-style-type: none"> <li>Choose <i>Let Internet Explorer decide how pop-ups should open</i></li> </ul>  |
| Security    | For the “zone,” click: <ul style="list-style-type: none"> <li>Trusted Sites</li> <li>Click the Sites button. Under Websites to add to this zone type <code>https:// *.ohio.gov</code> and click Add to add as a Trusted Site.</li> <li>Then go to the bottom of the screen and Click Custom Level</li> </ul> | Click the Custom Level button to open the Security Settings window. Scroll down the list and choose the following settings: <ul style="list-style-type: none"> <li>Automatic prompting for file downloads: <i>Enable</i></li> <li>File download: <i>Enable</i></li> <li>Allow script initiated windows without size or position constraints: <i>Enable</i></li> <li>Allow websites to open windows without address or status bars: <i>Enable</i></li> <li>Display mixed content: <i>Enable or Prompt</i></li> <li>Use Pop-up Blocker: <i>Enable</i></li> </ul> At the bottom of the window: <ul style="list-style-type: none"> <li>Reset custom settings/reset to (dropdown menu): select: <i>Medium</i></li> </ul> |
| Privacy     | On the Privacy tab:  | <ul style="list-style-type: none"> <li>Move the Privacy Settings slide to <i>Medium</i></li> <li>Under Pop-up Blocker, select <i>Turn on Pop-up Blocker</i></li> </ul>  |
|             | Click the Settings button to open the Pop-up Blocker Settings window.  | <ul style="list-style-type: none"> <li>In Address of website to allow type <code>*.ohio.gov</code> and click <i>Add</i></li> <li>Filter level: set to <i>Medium: Block most automatic pop-ups</i></li> <li>Click Close.</li> </ul>  |
| Advanced    | On the Advanced tab:   | Scroll down the list and do the following: <p>Java:</p> <ul style="list-style-type: none"> <li><i>Deselect</i> “Use JRE [version no.] for &lt;applet&gt; (If you will be running Custom Reports, i.e. Crystal Reports, you will need to Select this option.)</li> </ul> <p>Security</p> <ul style="list-style-type: none"> <li><i>Select</i> “Empty Temporary Internet Files Folder when browser is closed”</li> <li><i>Deselect</i> “Do not save encrypted pages to disk”</li> <li><i>Select</i> “Enable Integrated Windows Authentication”</li> <li><i>Select</i> “Use SSL 2.0”</li> <li><i>Select</i> “Use SSL 3.0”, <i>Deselect</i> “Use TLS 1.0”</li> </ul>  |

## Configuring the Internet Explorer 9 Browser

Unifier runs in an Internet Explorer browser window. This document outlines the settings within Internet Explorer that need to be configured in order for Unifier to run successfully. This setup must be performed for each computer on which you will be running Unifier. When you have finished configuring the computer, **log out of Unifier and close the browser completely for the new settings to take effect.**

1. Open Internet Explorer.
2. Verify your browser version.
3. Click the **Tools** dropdown menu and select **Internet Options**.



## OAKS CI Training Guide – First Time User Setup

The table below summarizes the settings in the Internet Options window. When you have configured Internet Explorer 9 with the following options, **close the browser and restart your computer.**

| In this tab | Do this  | Choose this setting  |
|-------------|--|--|
| General     | Under Browser History, click the Settings button to open the Settings window.  | <ul style="list-style-type: none"> <li>Choose <i>Every time I visit webpage</i></li> <li>Amount of disk space to use: <i>1000MB or higher</i></li> </ul>   |
|             | Under Browsing History, click the Delete Files button to open the Delete Browsing History window.  | <ul style="list-style-type: none"> <li>Under Temporary Internet Files, click the <i>Delete Files</i> button (do this regularly to clear the cache).</li> </ul>   |
|             | Under Tabs, click the Settings button.   | <ul style="list-style-type: none"> <li>Choose <i>Let Internet Explorer decide how pop-ups should open</i></li> </ul>   |
| Security    | For the “zone,” click: <ul style="list-style-type: none"> <li>Trusted Sites</li> <li>Click the Sites button. Under Websites to add to this zone type <i>https:// *.ohio.gov</i> and click Add to add as a Trusted Site.</li> <li>Then go to the bottom of the screen and Click Custom Level</li> </ul> | Click the Custom Level button to open the Security Settings window. Scroll down the list and choose the following settings: <ul style="list-style-type: none"> <li>File download: <i>Enable</i></li> <li>Allow script initiated windows without size or position constraints: <i>Enable</i></li> <li>Allow websites to open windows without address or status bars: <i>Enable</i></li> <li>Display mixed content: <i>Enable or Prompt</i></li> <li>Use Pop-up Blocker: <i>Enable</i></li> </ul> At the bottom of the window: <ul style="list-style-type: none"> <li>Reset custom settings/reset to (dropdown menu): select: <i>Medium</i></li> </ul> |
| Privacy     | <b>On the Privacy tab:</b>   | <ul style="list-style-type: none"> <li><b>Move the Privacy Settings slide to <i>Medium</i></b></li> <li><b>Under Pop-up Blocker, select <i>Turn on Pop-up Blocker</i></b></li> </ul>   |
|             | <b>Click the Settings button to open the Pop-up Blocker Settings window.</b>   | <ul style="list-style-type: none"> <li><b>In Address of website to allow type <i>*.ohio.gov</i> and click <i>Add</i></b></li> <li><b>Filter level: set to <i>Medium: Block most automatic pop-ups</i></b></li> <li><b>Click <i>Close</i>.</b></li> </ul>   |
| Advanced    | On the Advanced tab:   | Scroll down the list and do the following: <p>Security</p> <ul style="list-style-type: none"> <li><i>Select</i> “Empty Temporary Internet Files Folder when browser is closed”</li> <li><i>Deselect</i> “Do not save encrypted pages to disk”</li> <li><i>Select</i> “Enable Integrated Windows Authentication”</li> <li><i>Select</i> “Use SSL 2.0”</li> <li><i>Select</i> “Use SSL 3.0”, <i>Deselect</i> “Use TLS 1.0”</li> </ul>  |

**NOTE: MOST OF THE ISSUES THAT USER’S MAY HAVE WITH IE9 are due to Privacy settings and PoPU blocker**