Introduction

This document contains instructions for adding Finance as a trusted site, allowing pop-ups for PeopleSoft applications, clearing your browser history, enabling Java Script, printing and copying a PeopleSoft screen and enabling query users to download to Excel.

Supported Versions of Internet Explorer

To determine what version of Internet Explorer you are using, open Internet Explorer, click on the Help menu, then click on About Internet Explorer.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Platform/Version</th>
<th>Browser/Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows (32-bit)</td>
<td>XP</td>
<td>Internet Explorer/7,8</td>
</tr>
<tr>
<td>Vista</td>
<td>Internet Explorer/7,8,9*</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Internet Explorer/8</td>
<td></td>
</tr>
<tr>
<td>Windows x64 (64-bit)</td>
<td>Vista</td>
<td>Internet Explorer/7,8</td>
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<td>Internet Explorer/8,9*</td>
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</tbody>
</table>

*Note: Internet Explorer 9 is currently not supported by the Summit Enterprise Reporting System.

Add Finance 9.1 as a Trusted Site

<table>
<thead>
<tr>
<th>Internet Explorer</th>
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</thead>
<tbody>
<tr>
<td>1. Click the <strong>Tools</strong> dropdown list in the browser menu.</td>
</tr>
<tr>
<td>2. Click the Internet Options list item.</td>
</tr>
<tr>
<td>3. Click the <strong>Security</strong> tab.</td>
</tr>
<tr>
<td>4. Select the <strong>Trusted sites</strong> icon.</td>
</tr>
<tr>
<td>5. Click the <strong>Sites</strong> button.</td>
</tr>
<tr>
<td>6. Verify the <strong>Require server verification for all sites in this zone</strong> box is not selected.</td>
</tr>
<tr>
<td>7. Insert the Finance domain in the <strong>Add this Web site</strong> to the zone field: *.umasscs.net</td>
</tr>
<tr>
<td>8. Click the <strong>Add</strong> button.</td>
</tr>
<tr>
<td>9. Insert the Secure Access Login domain in the <strong>Add this Website</strong> to the zone field: ucollaborate.net</td>
</tr>
<tr>
<td>10. Click the <strong>Add</strong> button.</td>
</tr>
<tr>
<td>11. Click the <strong>Close</strong> button.</td>
</tr>
<tr>
<td>12. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
Allow Pop-Ups
Although for other web sites you will probably want to block pop-ups, you need to allow pop-ups for Finance 9.1 and related applications, such as the UPK on-line tutorials. Follow these instructions to allow pop-ups for PeopleSoft and other administrative applications.

### Internet Explorer

1. Click the **Tools** dropdown list.
2. Click the **Internet Options** list item.
3. Click the **Privacy** tab.
4. Click the **Settings** button under the Pop-up Blocker section.
5. Enter the Secure Login domain name (ucollaborate.net) into the **Address of Web Site to allow** field.
6. Click the **Add** button.
7. Enter the Finance domain name (*.umasscs.net) into the **Address of Web Site to allow** field.
8. Click the **Add** button.
9. Click the **Close** (or OK) button.
10. Click the **OK** button.

Clear Your Browser History
As you use your web browser, locations of web sites you visit and other pieces of information are stored or cached on your computer. Sometimes this information can prevent you from logging into a PeopleSoft application or from using various functions. You may need to clear your browser history to resolve these problems.

### Internet Explorer

**Version 7:**
1. Click the **Tools** dropdown list in the browser menu.
2. Click the **Delete Browsing History** option. The Delete Browsing History window opens.
3. Click the **Temporary Internet Files** button.
4. Click the **Cookies** button.
5. Click the **History** button
6. Click the **Close** button.
7. Close your browser session; reopen your browser to log in to Finance.

**Version 8:**
1. Click the **Safety** dropdown list in the browser menu.
2. Click the **Delete Browsing History** option. The Delete Browsing History window opens.
3. Verify the **Temporary Internet Files, Cookies, and History** checkboxes are selected.
4. Unselect the **Preserve Favorites website data, Form Data, Passwords, and InPrivate Filtering Data** checkboxes.
5. Click the **Delete** button.
6. Close your browser session; reopen your browser to log in to Finance.

Enable Java Script

As PeopleSoft pages run Java Scripts behind the scenes, your browser must be set to enable Java Scripts to ensure pages are displayed properly.

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<tr>
<td>1. Click the <strong>Tools</strong> dropdown list.</td>
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<tr>
<td>2. Click the <strong>Internet Options</strong> list item.</td>
</tr>
<tr>
<td>3. Click the <strong>Security</strong> tab.</td>
</tr>
<tr>
<td>4. Click the <strong>Custom level...</strong> button.</td>
</tr>
<tr>
<td>5. Scroll down until you find the <strong>Scripting</strong> section and then “<strong>Active Scripting</strong>.”</td>
</tr>
<tr>
<td>6. Verify the <strong>Enable</strong> radio button is selected.</td>
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</tbody>
</table>
Printer Settings for Printing a PeopleSoft Screen

Most key PeopleSoft pages have a printer-friendly option available for printing purposes. However, if you do print screens that do not have this option, we recommend following the steps below.

**Option 1: Manual Print Setup (Repetitive Process)**

This section shows you how to manually set up printing properties each time you need to print a screen.

1. Right click in the area you wish to print on the page.
2. Click the **Select All** option.
3. Right click the highlighted area and select **Print Preview**. On the top of the Preview Pane, you will see a dropdown box that says **As laid out on screen**.
4. You may change the orientation to **Landscape** mode (depending on your printing needs).
5. Select the **As selected on screen** option in the dropdown box. You will see a preview of the selected frame you are trying to print.
6. Resize as needed. To resize, select **Shrink to Fit** and select the desired size increase. The preview will adjust to reflect the sizing changes.
7. Click on the **Printer** icon in the upper left corner.
8. Verify all your printer property selections are correct (e.g., printer, number of copies).
9. Click the **Print** button.

**Option 2: Capturing a Screen**

You can also copy/paste a screen to Microsoft Word. You may need to crop the screenshot once you have copied it into Microsoft Word (for example, to remove the menu bar from the screenshot).

**Important:** If you are capturing a long screen where scrolling is required, please use Option 1. Content below the fold will not be captured when using Option 2.

1. Press the **Print Screen** key on your keyboard.
2. Open a blank document in Microsoft Word.
3. Press the **Ctrl + V** keys on your keyboard to paste the screenshot into the document.
4. Crop and resize, as needed.
Set Internet Explorer (versions 7,8, 9) to Download Queries to Excel
This browser setting is required only for users who run queries in Finance 9.1.

1. From the **Tools** dropdown list, select the **Internet Options** list item.
2. Select the **Security** tab.
3. Verify the **Trusted Sites** zone is highlighted.
4. Click the **Sites** button (upper right side).
5. Add https://*.umasscs.net and https://*.ucollaborate.net,
6. Click the **Add** button after each entry.
7. Click **Close**.
8. When returned to the **Trusted Sites** window, click the **Custom level** button.

9. Scroll half way down the **Settings** window.
10. Verify the **Automatic prompting for file downloads** and **File download** radio buttons are set to **Enable**.
11. Click the **OK** button.