Using WebADI – Excel and Internet Explorer Configuration Changes

Version	Date	Who	Notes
1	28 Sept 2016	Simon Irvin	First version following initial site visits
2	11 Jan 2017	Simon Irvin	Updated for use with initial rollout

Important

Several of the steps described in this document will require administrative access to the workstation / PC being used to access the UFS and so should be carried out by a member of the local IT support team. If, after applying the changes described below, it is still not possible to use the WebADI functionality, users should send an email to the **GL Journals Helpdesk** [ufs_glj@admin.cam.ac.uk] with a description of the problem including any error messages being displayed and screenshots where possible.

Introduction

WebADI is a technology available through the UFS which allows users to download and upload data to the UFS via an Excel spreadsheet. This document describes the changes that may be needed to a user's PC configuration before they can successfully access and use WebADI.

The changes listed below fall into two categories - <u>changes to the settings in Excel</u> and <u>changes to</u> <u>the Internet browser</u> being used to access the UFS.

Changes to Excel

The macro settings in Excel may need to be changed:

- 1. Start Excel
- 2. Click File -> Options
- 3. Click **Trust Center** link in the **Excel Options** window.
- 4. Click <u>Irust Center Settings</u>...
- 5. In the Trust Center window click Macro Settings link from the menu on the left.

Trust Center		? ×
Trusted Publishers	Macro Settings	
Trusted Locations	Disable all macros without notification	
Trusted Documents	<u>D</u> isable all macros with notification	
Add-ins	 Disable all macros except digitally signed macros Enable all macros (not recommended; potentially dangerous code can run) 	
ActiveX Settings		
Macro Settings	Developer Macro Settings	
Protected View	$\overrightarrow{\mathbb{V}}$ Trust access to the <u>V</u> BA project object model	
Message Bar		
External Content		
File Block Settings		
Privacy Options		
	ОК	Cancel

- 6. Under Macro Settings make sure that Disable all macros with notification is selected.
- 7. Under **Developer Macro Settings** make sure that **Trust access to the VBA project object model** is ticked.
- 8. Click OK
- 9. You should then close Excel before proceeding.

Browser Configuration Changes

Firefox and Chrome Users

The current advice from Oracle is that Firefox users should be able to use WebADI with the default configuration of Firefox. Internal testing has indicated that Chrome can also be used unmodified.

However, the Internet Explorer trusted site security settings will still need to be set as below and https://ufslive.admin.cam.ac.uk will need to be in the trusted sites list. That is because the status window launched from inside Excel is an instance of the IE Document Object Model and is subject to the IE security settings, regardless of which browser is being used to launch the WebADI session.

MAC OS Users with Safari Browser

WebAdi is not currently supported by Oracle for use on MAC OS.

Internet Explorer Users

- 1. Close all existing Internet Explorer Windows.
- Open a new Internet Explorer Window and select Tools (in some versions of Internet Explorer this is the Cog icon in the top right of the browser window) -> Internet Options -> Security (Tab) from the browser menu.
- 3. Select Trusted Sites

nternet Options	? **
General Secur	ity Privacy Content Connections Programs Advanced
Select a zone	to view or change security settings.
0	🔩 🗸 🚫 📗
Internet	Local intranet Trusted sites Restricted sites
Trus	sted sites
V trust your	zone contains websites that you not to damage your computer or files. nave websites in this zone.
-Security leve	el for this zone
Allowed lev	vels for this zone: All
	1edium - Prompts before downloading potentially unsafe content - Unsigned ActiveX controls will not be downloaded
Enable	e Protected Mode (requires restarting Internet Explorer)
	Qustom level Default level
	Reset all zones to default level
Some se	ttings are managed by your system administrator.
	OK Cancel Apply

- 4. Make a note of the **Security level for this zone** (e.g. "Medium" in the screenshot above)
- 5. Select Sites (button)

You can add and remove we this zone will use the zone's		
dd this website to the zone:		
		Add
/ebsites:		
*.cam.ac.uk		<u>R</u> emove
http://www.java.com	=	=
https://*.sci-ware-customer.com	Ľ	
https://iconnect.aptbacs.co.uk		-
Require server verification (https:		
n Require Server Verification (https:) for all sites in t	his zone
		Close

- 6. Add https://ufslive.admin.cam.ac.uk as a trusted site
- 7. Click on Close
- 8. Select Custom Level (button)
- 9. Under the **Downloads** section, make sure that **File download** is enabled.

Settings			
🔰 R	un antimalware software on ActiveX controls		
(Disable		
0	Enable		
🧃 S	cript ActiveX controls marked safe for scripting*		
0	Disable		
(Enable		
	Prompt		
e Down			
🛃 F	ile download		
0	Disable		
	Enable		
- E	ont download		
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	Enable		
Di curi	Prompt		Ŧ
4	III	+	
*Takes eff	ect after you restart your computer		
Reset custo	m settings		
Reset to:	Medium (default)	Reset	
	ОК	Can	

10. Under the Scripting section make sure that Allow Status bar updates via script is enabled.

ettings	
Prompt	*
Scripting	
S Active scripting	
Disable	
Enable	
Prompt	
Allow Programmatic clipboard access	
Disable	
Enable	
Prompt	
Allow status bar updates cript	
 Disable 	
Enable	
Allow websites to prompt for information using a state of the state	ng scripted winde
Disable	-
Enable III	
	r
*Takes effect after you restart your computer	
eset custom settings	
eset to: Medium (default)	Reset

- 11. Return to the main Internet Options screen and click on Advanced
- 11. Under the **Security** section make sure that **Do not save encrypted pages to disk** is **not** enabled.

