

HEED Online – Recommended Internet Explorer settings

This document describes how to implement some recommended settings in Internet Explorer. The implementation of the recommended settings is necessary due to changes to default settings in recent versions of Internet Explorer that has resulted in a degraded experience when using HEED Online, particularly when running reports with an Excel output. The behaviour of Internet Explorer is driven by Microsoft's modifications to recent versions of Internet Explorer and/or by internet security policies implemented by some organizations. Clearly EST has no control over these activities however this document will provide advice on how to modify settings to ensure that useful functionality is not lost when using HEED Online.

The issues appear to be much less prevalent in other internet browsers (e.g. Google Chrome). Therefore a simple resolution could be to use an alternative browser to Internet Explorer. However if it is not possible to switch to an alternative browser, it is highly recommended that you modify your Internet Explorer settings as recommended in this document.

NB. Some organizations do not grant individuals the necessary permissions to set their own Internet Explorer settings. If you experience difficulty in modifying your Internet Explorer settings, it is recommended that you speak to an IT administrator in your organization before taking any further action. An IT Administrator should be able to modify the relevant settings on your behalf.

See next page

Add HEED Online 3 into your Trusted Sites list

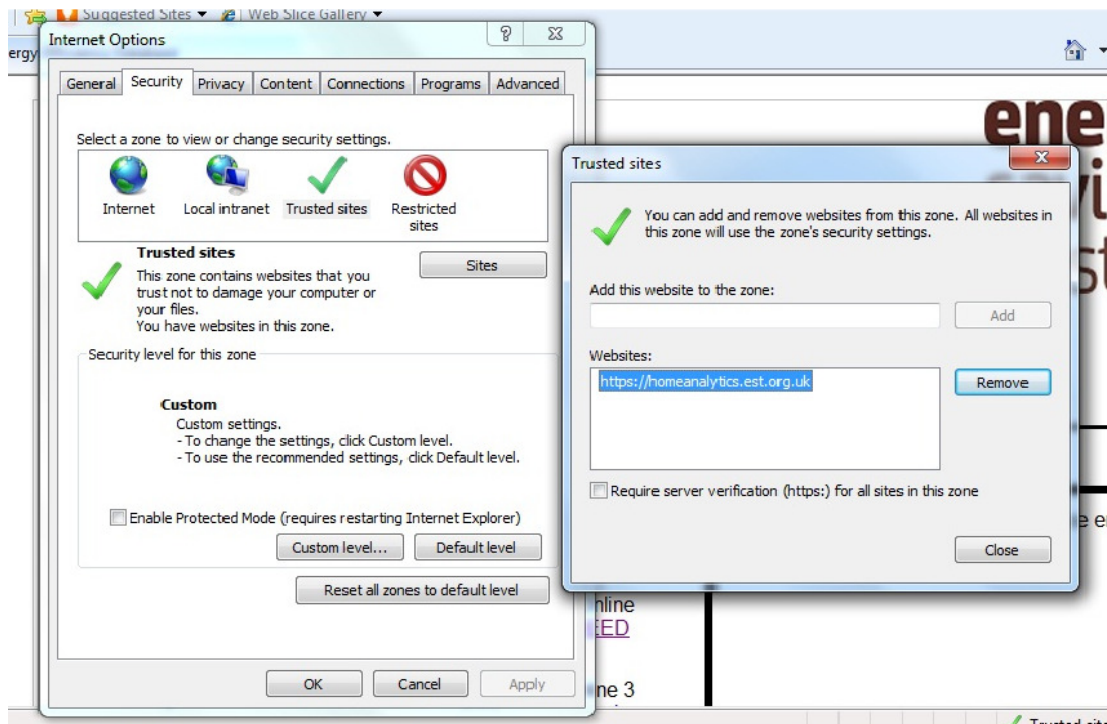
Adding HEED Online to your trusted sites and modifying the settings for this zone is a more secure way to implement modifications to your IE settings as they will only apply to web sites you trust (e.g. HEED Online) rather than all web sites you may visit.

NB. You will need to add the new URL for HEED Online 3 even if HEED Online 2 has previously been added to you trusted sites list

Open an Internet Explorer browser and Click:

1. Tools
2. Internet options
3. Security
4. Trusted Sites
5. "Sites" button - Type "https://homeanalytics.est.org.uk" into the 'Add this website to the zone' box and then click "Add"

See screenshot below



How to resolve problems when running HEED Online reports with an Excel output.

Please follow the instructions below if you experience the following symptoms when running a HEED Online (Cognos) report to Excel:

- The Cognos Report Viewer window displays a blank page
- The Cognos Report Viewer window closes and returns you to the portal page or folder page.

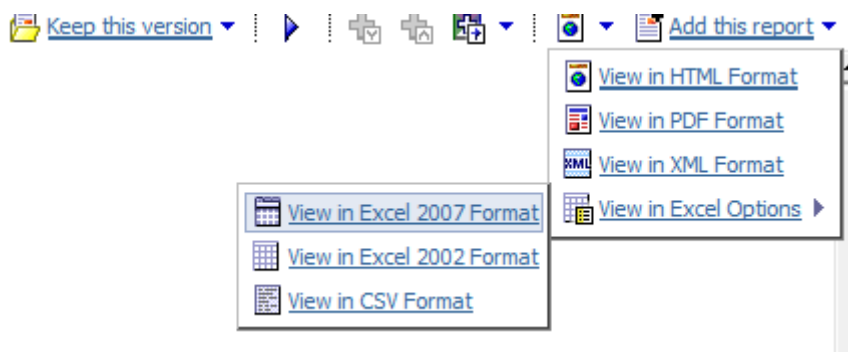
Change the following settings to allow HEED Online reports to be provided in Excel. With Trusted Sites selected on the Security Tab (see screenshot above)

- Click Custom Level – find the Settings and change to:
 - **Use Popup Blocker- Disable**
 - **Automatic prompting for file download – Enable**
 - **File download – Enable**

Once these settings have been changed, save and close Internet Explorer. Start a new session and login to HEED Online. You should be able to run reports to Excel (see below).

To download an Excel or PDF output of a report

Click on the View Options icon (top right of screen once a report has been run) and select the required option (see below).

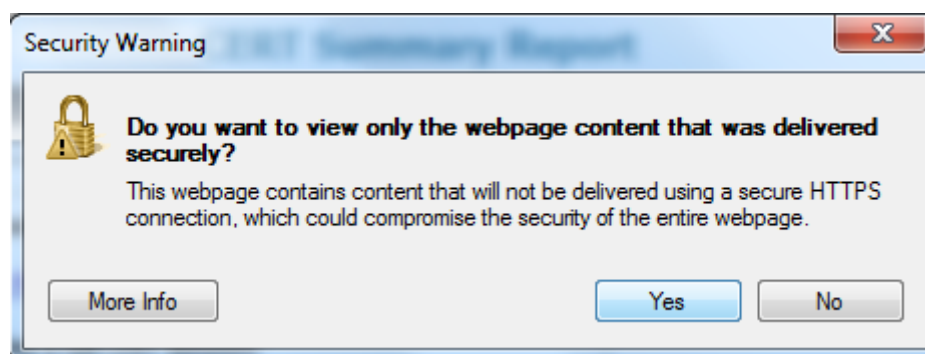


Further guidance on Excel outputs can be found here:

<http://www.energysavingtrust.org.uk/Publications2/Housing-professionals/HEED-PDFs/HEED-Online-2-Download-Reports-To-Excel-Format>

Disable Popup security warning

The warning message below is likely to popup when running all Heed Online reports



To disable this message - With Trusted Sites selected on the Security Tab (see screenshot above)

- Click Custom Level – find the Setting below and change to:
 - **Display mixed content - Enable**

NB. Some users may also need to apply this setting in the Internet zone.