

Summary

This document is intended to guide you through the process of installing and configuring PeopleTools 8##### via Windows Remote Application (App). Remote App allows the end user to run Windows-based nVision client as a remote application on a central server.

Prerequisites

- Remote Desktop Client on your PC
- Previous SFS PT version client
- Firewall access

Firewall Information

Campuses likely will have an inbound firewall and some might have an outbound firewall. It is uncertain if inbound firewall(s) will need to be updated but the outbound firewalls, for those that have them, will certainly need the following changes:

Campuses that access the SFS nVision Windows-based client need to allow outbound traffic to:

- Donzi (144.92.69.137)

Port 3389 for Windows Remote Desktop/Application access

- Regal (144.92.69.151)

Port 445 for Windows file sharing access (i.e. drive mapping).

- Robalo (144.92.128.87)

This is our Windows process scheduler machine for test environments. End users may need to place files here to be processed for testing.

Part 1- Copy the Files to Your Desktop:

nVision example. The steps are the same for App Designer and Data Mover clients.

- From the email, **save (or drag & drop)** the attached *Configuration_Manager_8#####.rdp*, *Import Client Config for 8#####.rdp*, and *nVision_8#####.rdp* files to your workstation desktop.



Important note: *If* the .rdp files look like pdf icons instead of monitors, you will need to set your defaults for this file type by following the steps listed at the end of this document (page 9): *(If they look like monitors, you have saved them to your desktop successfully).*



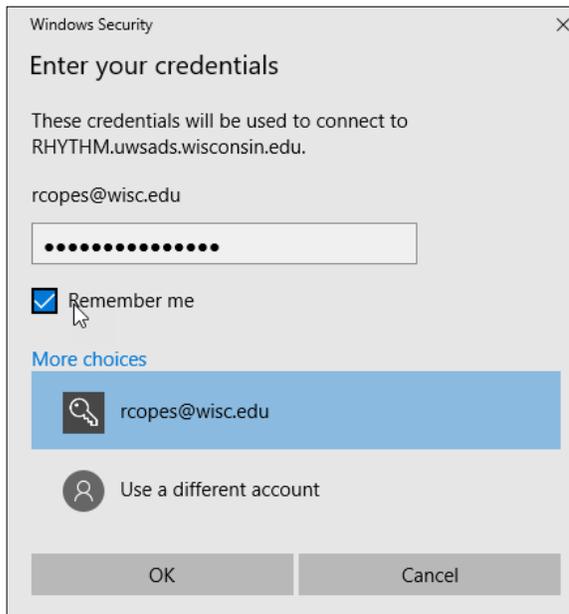
Part 2- Configure the Client:

- On your desktop, double click the Configuration_Manager_8####.rdp (monitor icon) to begin the setup of your nVision Client.



Windows Authentication

- Next, the Windows Security credential validation prompt will appear. If you are an existing client user, **log in** using the credentials you would normally use to log in. If the default user ID looks different, **click** the 'Use another account' option and **re-enter** the username and password you normally use.



- **Enter** your NetID and corresponding NetID password. Then **check** the 'Remember me' box and **click** 'OK'.

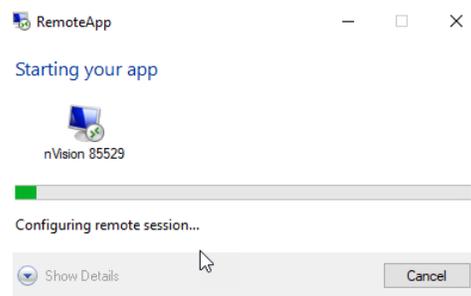
If you are not able to successfully log in to the Windows Security authentication in Step 1 above, please go to the Windows Authentication Help section (page 6).

- If applicable, **check** the 'Remember me' box, and **click** 'OK'.
- An instance of *Configuration_Manager_8####* application will launch.
- Once Configuration Manager has launched, double **click** the *Import Client Config* icon.

**will process briefly before disappearing.*

Part 3- Oracle Authentication:

- Now, back on your desktop, **double click** the icon for *nVision_8####*(.rdp file).



- You may, or may not see, the next window depending on if you **checked** 'Don't ask me again for connections to this computer' option. If so, **click** 'Connect'.



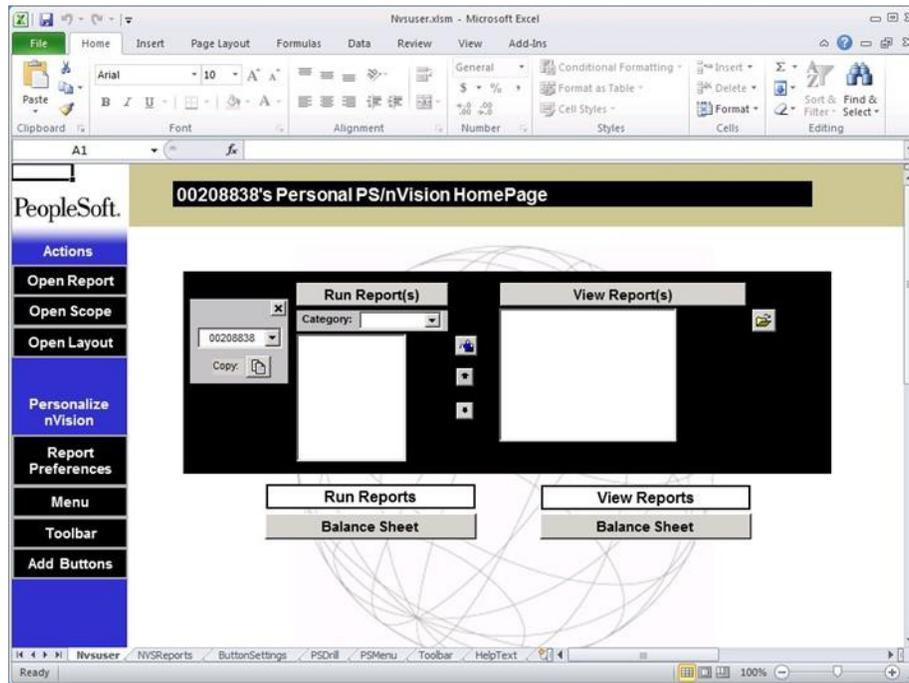
- Next, an Oracle login screen should appear.



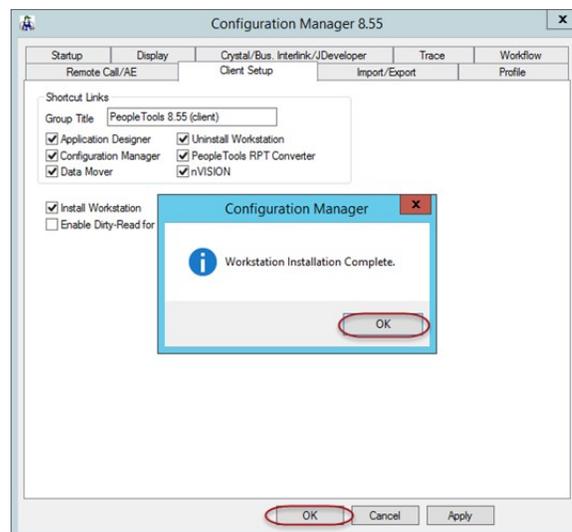
- **Pick** your environment from the *Application Server Name* list if it does not default to SFS.
- **Enter** your login credentials. Your EMPLID can be set up to default by following directions beginning on page 7. The password is the same as your **backdoor (PSA) website logon** to SFS. **Click** the following link to test your credentials.
<https://idp.uwsa.edu/uwsa/profile/SAML2/Redirect/SSO?execution=e1s1>. If you can log into the backdoor (PSA), you should be able to log into the client.
- If you need to have your backdoor (PSA) password reset, please **call** the DoIT helpdesk: 608-264-4357.
- The startup of the Windows-based client may take from a few seconds up to a few minutes. You will see this splash screen while loading:



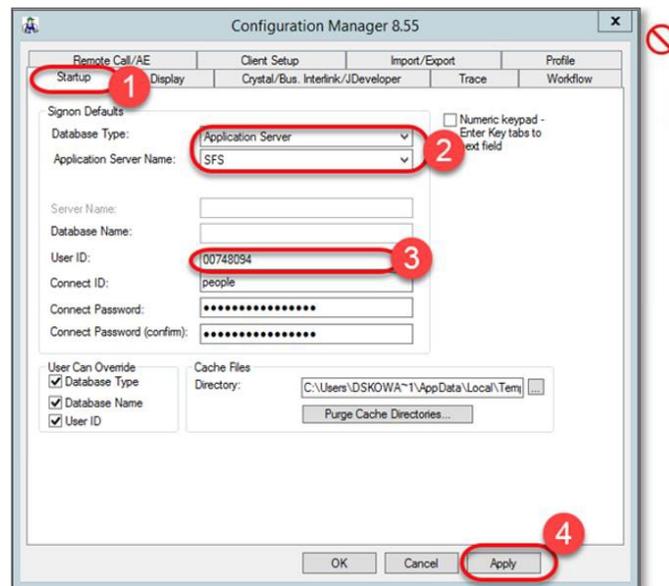
- Once the nVision client loads you will see the screen below. nVision is an excel based tool that pulls data from PeopleSoft based on the rules that you set up. Remember, this is nVision running on a Remote Application Server and **NOT** locally on your machine.



- OPTIONAL STEP- Personalizing Your EMPLID
 - Reopen the Configuration Manager file by double clicking the icon.



- **Click** the ‘Startup’ tab, if you are not defaulted there. (#1 below)
- **Verify** that the *Database Type* is set to “Application Server” and the *Application Server Name* is “SFS”. (#2 below)
- In the ‘User ID’ field, **type** your EMPLID.(#3 below) **Click** ‘Apply’, then ‘OK’.(#4 below)



DO NOT change any other fields on this screen or your configuration may be compromised.

Windows Authentication Help

Username/Password Problems?

Non-NetID Users

- If you do not have a NetID and are not able to log into the Windows Security authentication, please contact [UWSA Problem Solvers](#) for assistance. *(Please use this link. It has a relevant email subject line to help triage and expedite your request.)*

NetID Users

If you are having issues logging in or you do not know your username or password, you users can do one of the following:

- **Check Your Password-** Your NetID is used to log into [voicemail](#) and [MyUW](#). You can log into either location to test the accuracy of your password.
 - **Change Your Password- Self Help-** Go to <https://canvas.wisc.edu/> to the NetID Account Modification page. If you cannot log in here, go to Get Help below.
 - **Click** the “Change Your NetID Password” link.

Follow the directions on the webpage to update your NetID password.



- **Get Help-** If you **do not know** your NetID password:
 - Go to <https://login.wisc.edu/idp/profile/SAML2/Redirect/SSO?execution=e1s1>
 - Click "Forgot password".
 - Provide your NetID, date of birth and information from your Wiscard, following the onscreen directions.

The screenshot shows the 'NetID Password Reset' form. It includes a 'NetID' field with the example 'bbadger' and a link 'I don't know my NetID'. Below is a 'Date of Birth' section with dropdown menus for 'March', '7', and '2018'. The 'Wiscard' section has a 'Show me' link, a 'Wiscard Number' field with the example '9091234567', and an 'Issue Code' field with the example '2'. There is also a checkbox for 'I don't have a Wiscard' and a red 'Next' button at the bottom.

- Answer your security question(s).

The screenshot shows the 'NetID Password Reset' security question screen. It asks the user to 'Answer all security questions:' and provides a hint: 'Hint: Answers are NOT case sensitive.' The question is 'What is your parakeet's middle name?'. There is a text input field for the answer and a red 'Next' button at the bottom.

- Verify your email address on file. You will receive a verification email. Follow the directions to recover your NetID password. If you need additional password help, please call the DoIT Help Desk at 608-264-4357. For security reasons, password reset requests made to the DoIT Help Desk must be made by the user themselves and must only be done via phone.

NetID Password Reset

Next, we'll send a password reset verification to your recovery email address.

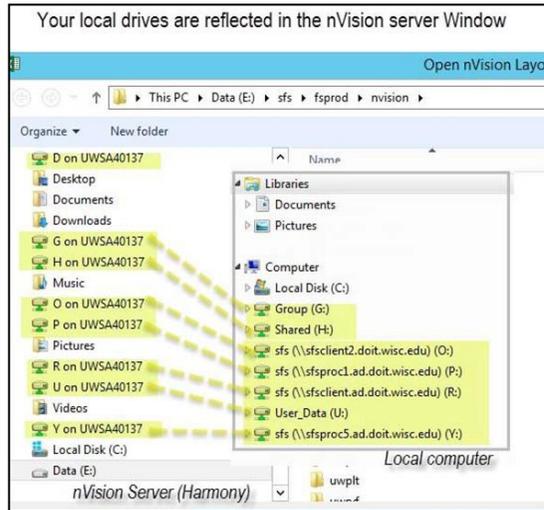
Recovery Email Address:

Send Verification Email

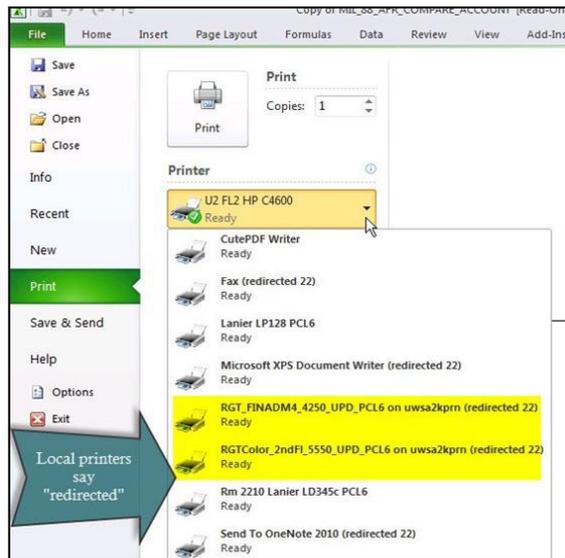
Notes About Local Drives and Printers:

Remote App uses your local Remote Desktop Client to make its connections. This client has its own settings. If you have not modified them, you will see your local drives and local printers listed within your Remote App connection.

When you interact with a file by either opening it or saving it, you should notice your local drives in the dialog box. They will appear in the format "C on <computer_name>" where C is the drive alias letter and <computer_name> is your computer's name. This may be a name assigned by your PC support staff. You should see one drive letter on the remote server for each drive you have on your local PC.



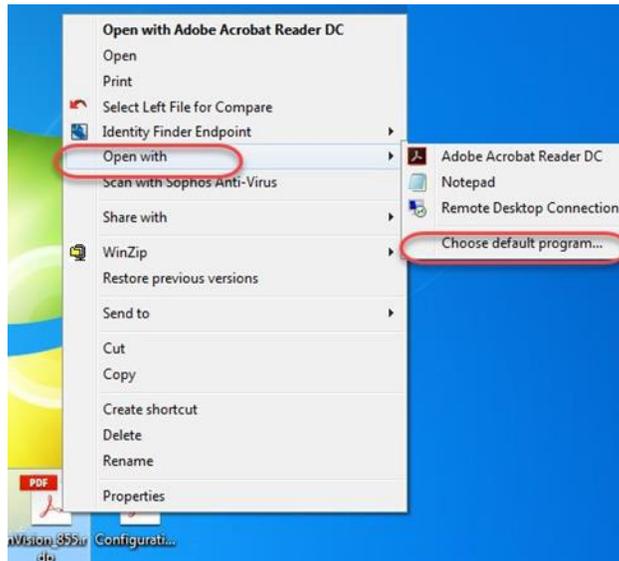
Your local printers will also show up when you try to print. You will see the word “redirected” next to your local printers. If you have any problems, contact UWSA Problem Solvers.



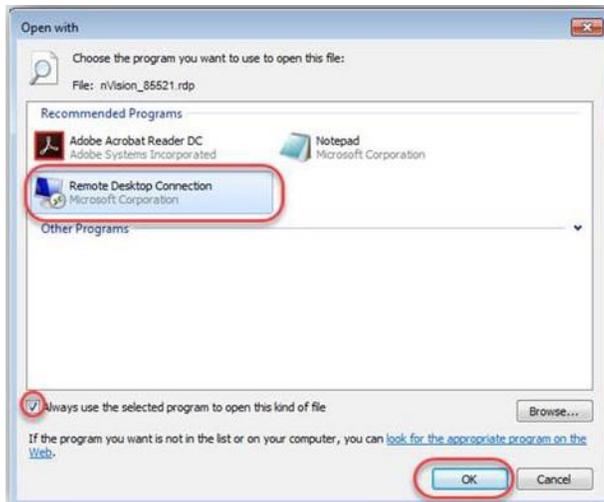
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- **Right click** on the icon. **Select** “Open with”, then “Choose default program...”



- **Select Remote Desktop Connection**, make sure the *'Always use the selected program to open this kind of file'* box is checked and **click 'OK'**.



- Your icons should now look like monitors.

