University of Wisconsin System
Shared Financial System (SFS)
PeopleTools 8.55.21
Client Setup Guide

Summary

This document will guide you through the process of installing and configuring the PeopleTools 8.55.21 via Windows Remote Application (App). Remote App allows the end user to run the Windows-based PeopleSoft client as a remote application on a central server. (HARMONY)

Prerequisites

- Remote Desktop Client on your PC
- Previous SFS PT8.55.15 client user (all users should have PT8.55.21 access automatically)
- 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:

1. sfsclient.doit.wisc.edu [**144.92.69.152**] This change will be implemented on 5/6.

Port 3389 for Windows Remote Desktop / Remote Application access.
Port 445 for Windows file sharing access (ie. drive mapping).

2. sfsproc1.ad.doit.wisc.edu [**144.92.69.149**]   This change will be implemented on 5/6.

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

3. sfsproc3.ad.doit.wisc.edu [**144.92.128.22**]. This is our Windows process scheduler machine for test environments. End users may need to place files here to be processed for testing. This change should be implemented in mid April.

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

Part 1- Copy the Files to Your Desktop:

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

1. From the email, **save** the attached *Configuration_Manager_85521.rdp* and *nVision_85521.rdp* files to your workstation desktop.


Drag and drop files from email to your workstation desktop

2. ⚠ **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 doing the following: *(If they look like monitors, you have saved them to your desktop successfully. Please skip to Part 2.)*

   a. **Right click** on the icon. **Select** *"Open with"*, then *"Choose default program…"*
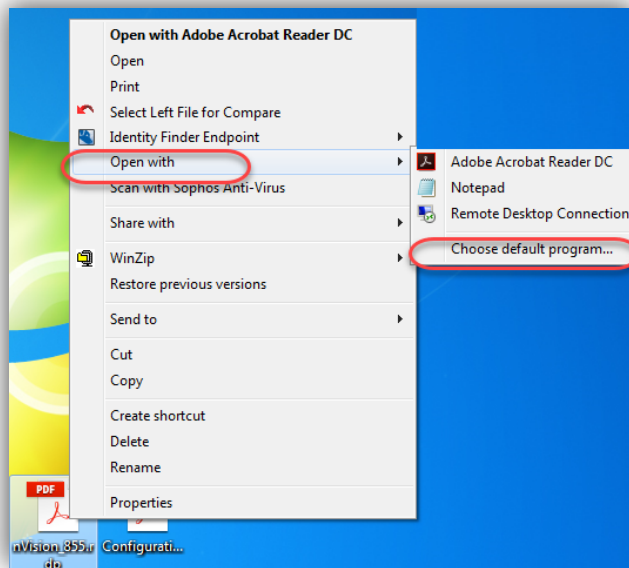
b. **Select** *Remote Desktop Connection, make sure the 'Always use the selected program to open this kind of file' box is checked* and **click** '*OK'*.

c. Your icons should now look like monitors.
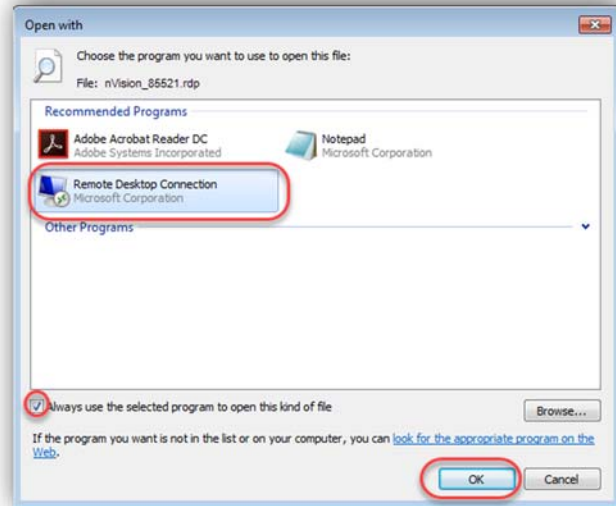
Part 2- Configure the Client:

1. On your desktop**, double click** the *Configuration_Manager_85521.rdp* (monitor icon) to begin the setup of your PeopleSoft Client.
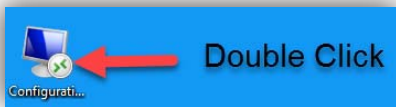
2. The below message may appear. If so, **click** '*Connect'*. We recommend that you **click** the *'Don't ask me again for connections to this computer'* option*.*

3. You may see the following dialog box. If so, **check** '*Don't ask me again for connections to this computer'*. Then, **click** '*Yes'*.

4. If you see this dialog box, **click** *'OK'*.

Windows Authentication

1. Next, the below 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.

> Examples:
> username@wisc.edu
> netid@wisc.edu
> username@LOGIN.WISC.EDU
> AD\username
> AD\username_sfs
> DOIT\username

a. **For NetID users only** - (If you do not have a NetID, skip to step 8.)

Enter your netid@LOGIN.WISC.EDU and corresponding NetID password. Then **check** the '*Remember my credentials'* box, and **click** '*OK'.*
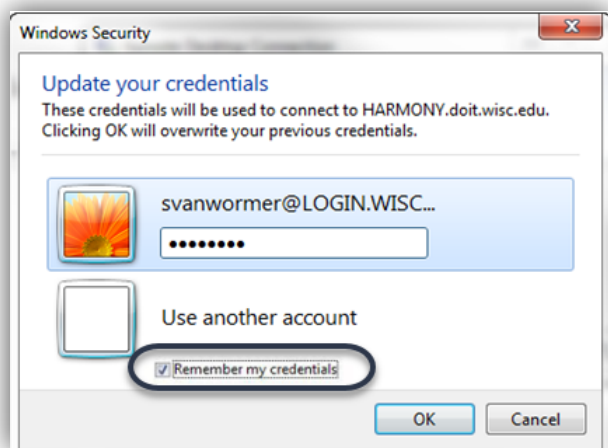

Please note: The user ID portion (before the @ symbol) **MUST** be in lower case and the "LOGIN.WISC.EDU" **MUST** be in all caps exactly as shown to the right.

b. **For users who DO NOT have a NetID**

You will need to use "DOIT\FLastname_sfs" to log in (where F= your first name initial). For example, Robert Smith would **type in** "DOIT\RSmith_sfs". Case does not matter in this instance. This is a unique Windows account setup for you by the SFS project. If you do not remember this password, email uwsaproblemsolvers@uwsa.edu for help.
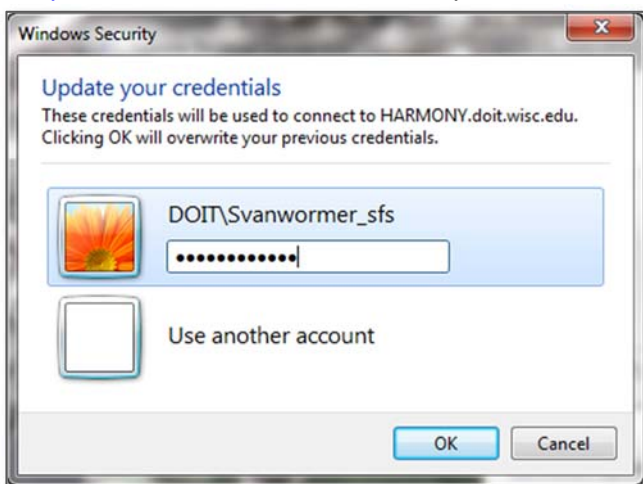
If you are not able to successfully log in to the Windows Security authentication in Step 1 above, please go to the Windows Authentication Help section.

2. If applicable, **check** the '*Remember my credentials'* box, and **click** '*OK'*. You will see the following screen pop up as you are being connected to the remote server. To see your progress, **click** *Show Details*.

3. An instance of the *Configuration_Manager_85521* application will launch.

Configuration Manager

1. Once the Configuration Manager has launched, **click** the '*Import/Export'* tab. Then **click**, the '*Import From a File'* button.
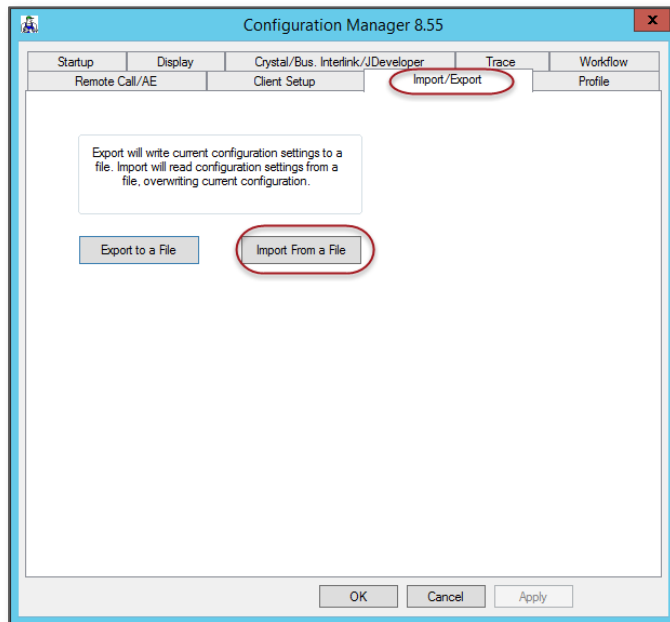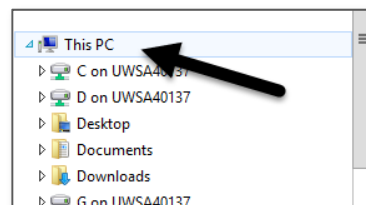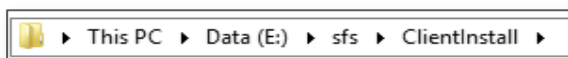

2. The following screen will open. On the *Data (E:)* drive, you should see the '*client_install_85521.cfg'* file**. Select** the 'client_install_85521.cfg' file and **click** '*Open'*.
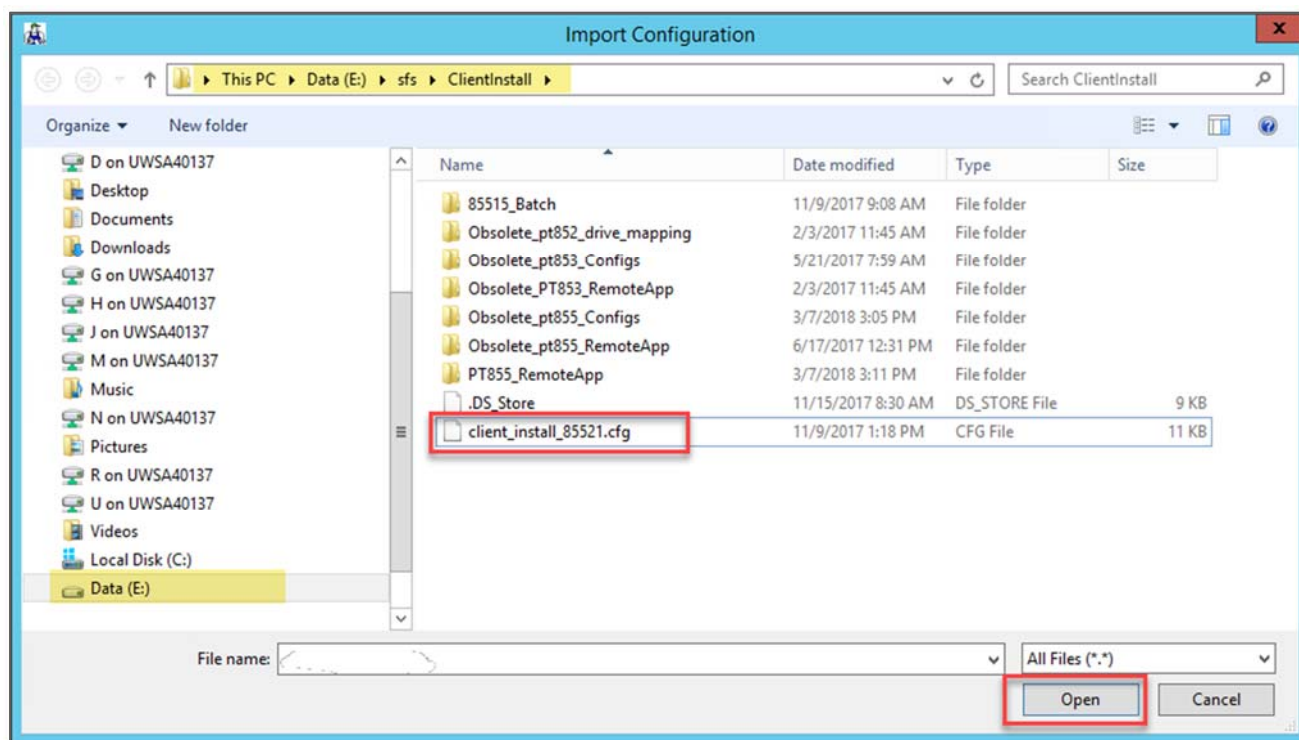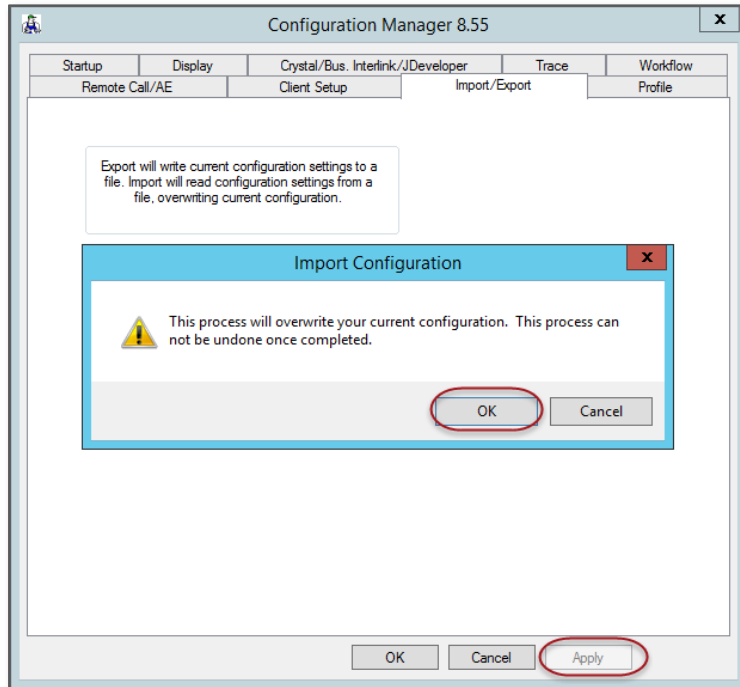
NOTE: If the correct directory doesn't automatically open, you may have to **click** the ▶ to the left of '*This PC*' to see the drive, then navigate to E:\sfs\ClientInstall.
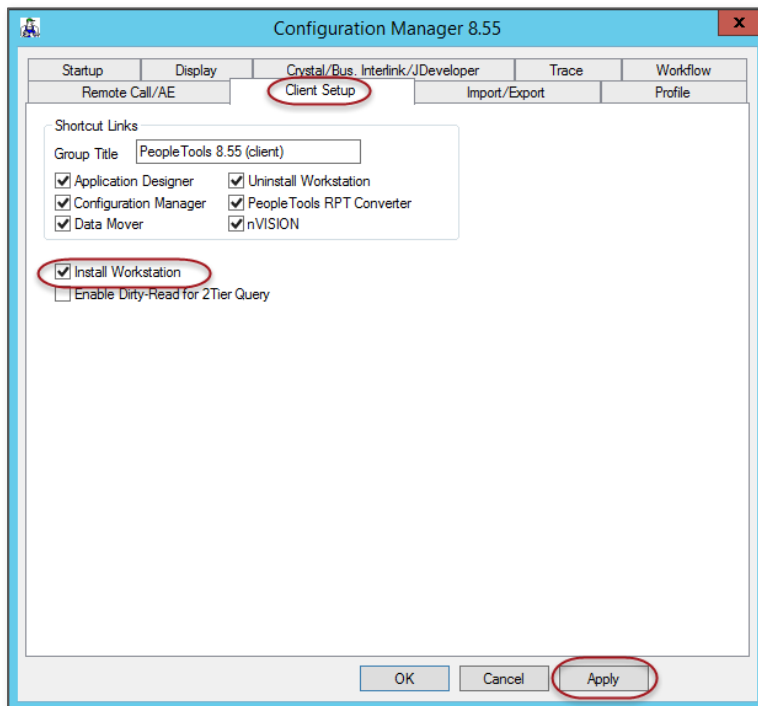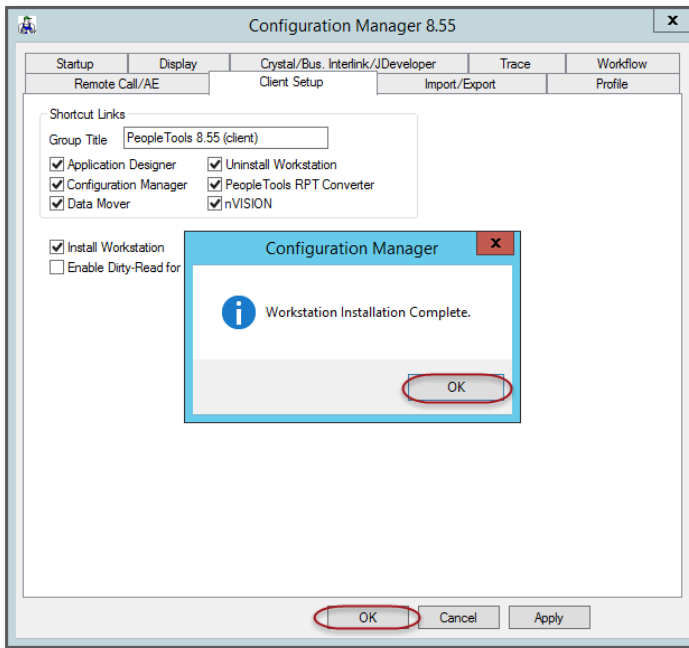
3. The below warning message should appear, **click** '*OK'* and then '*Apply.*'

4. **Navigate** to the '*Client Setup'* tab and confirm that all 6 *Shortcut Links* are checked. **Check** the *Install Workstation* check box and **click** '*Apply*'.

5. **Click** '*OK'* when the "Workstation Installation Complete" message appears. Then **click** '*OK'* to close configuration manager.

6. OPTIONAL STEP- Personalizing Your EMPLID
    1. **Reopen** the Configuration Manager file by double clicking the icon.
    2. **Click** the 'Startup' tab, if you are not defaulted there. (#1 below)
    3. **Verify** that the *Database Type* is set to "Application Server" and the *Application Server Name* is "SFS". (#2 below)
    4. In the 'User ID' field, **type** your EMPLID.(#3 below) **Click** 'Apply', then 'OK'.(#4 below)
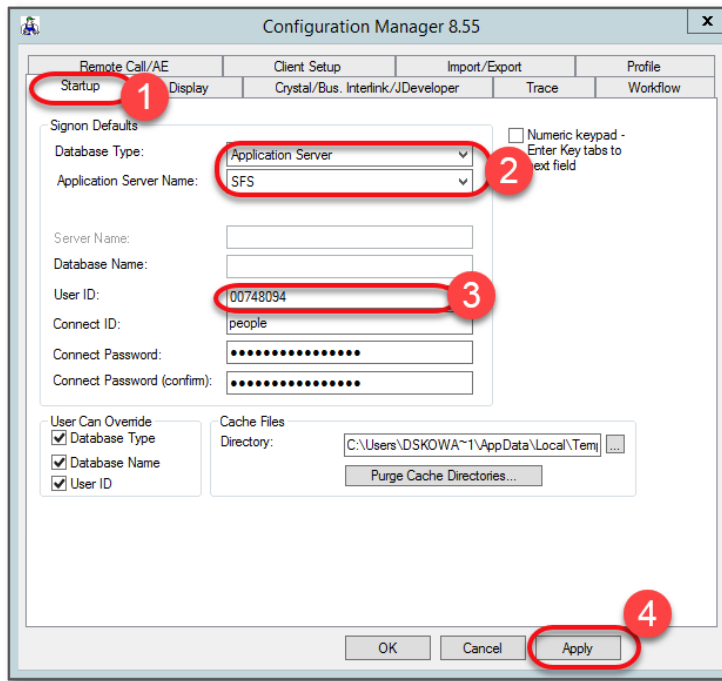
🚫 **DO NOT** change any other fields on this screen or your configuration may be compromised.

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.)*
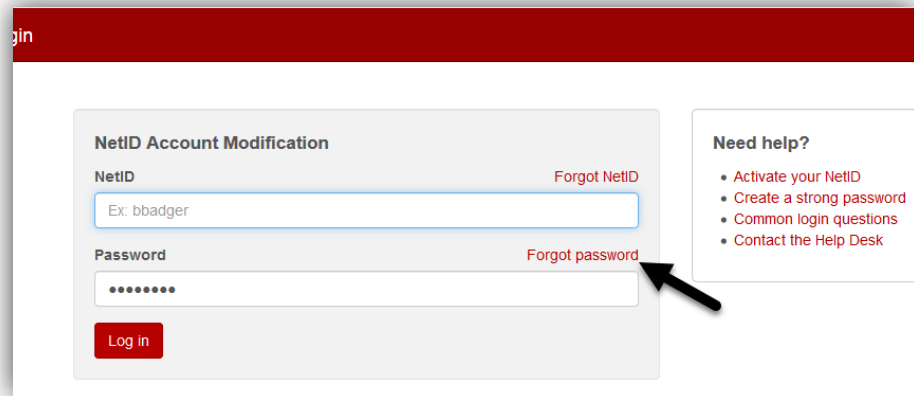
NetID Users

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

5. **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.

6. **Change Your Password- Self Help- Go** to https://www.mynetid.wisc.edu/modify
   a. **Log in** to the NetID Account Modification page. If you cannot log in here, go to Get Help below.
   b. **Click** the "Change Your NetID Password" link.
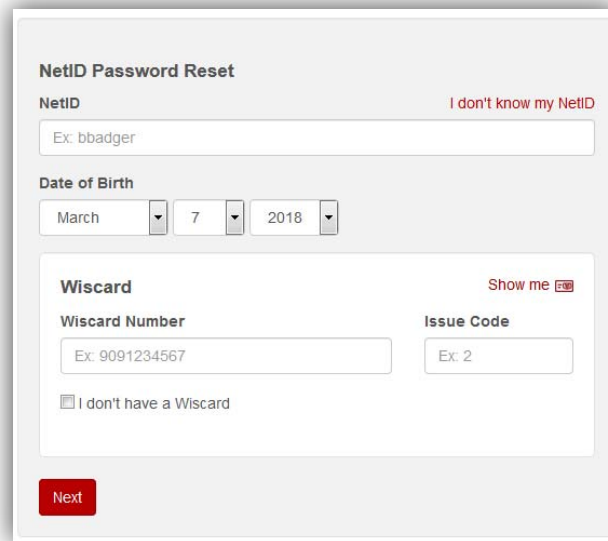   c. **Follow** the directions on the webpage to update your NetID password.
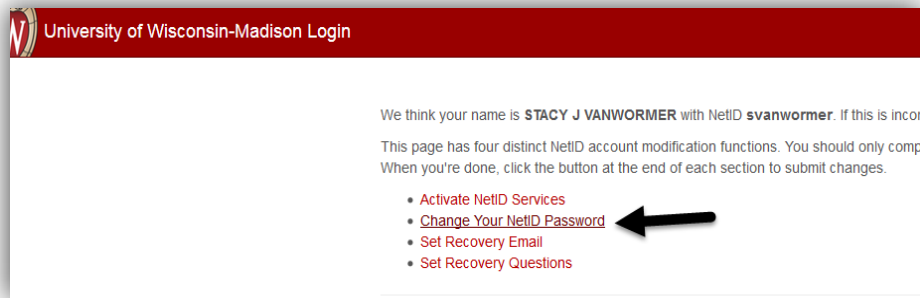
7. **Get Help-** If you **do not know** your NetID password:
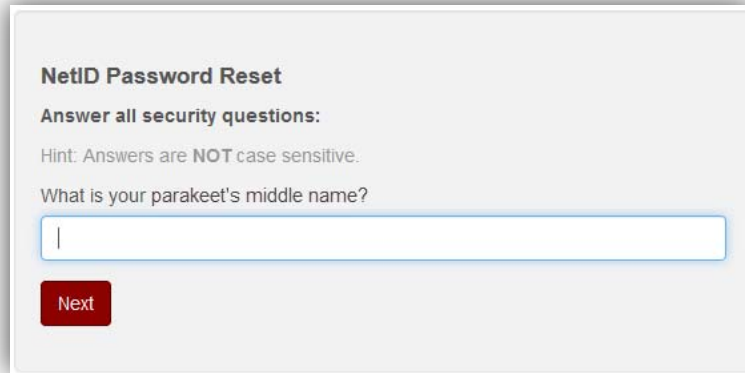   a. **Go** to https://www.mynetid.wisc.edu/modify.

b. Click "Forgot password".

c. Provide your NetID, date of birth and information from your Wiscard, following the onscreen directions.

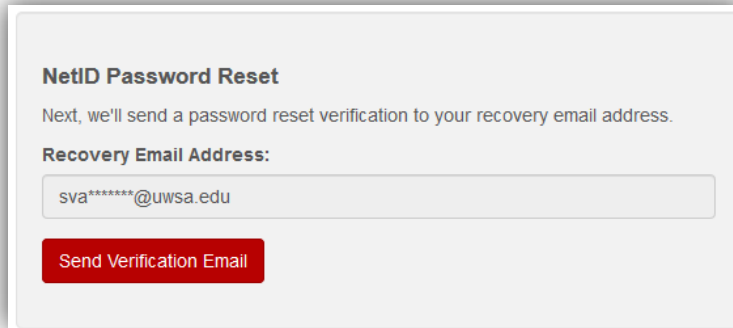d. Answer your security question(s).

NetID Password Reset

Answer all security questions:

Hint: Answers are **NOT** case sensitive.

What is your parakeet's middle name?

Next

e. 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. 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.
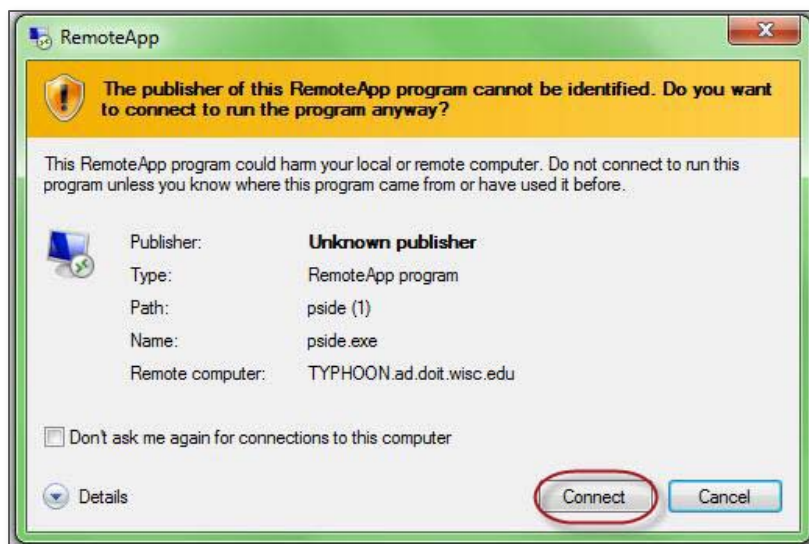
Recovery Email Address:

sva*******@uwsa.edu

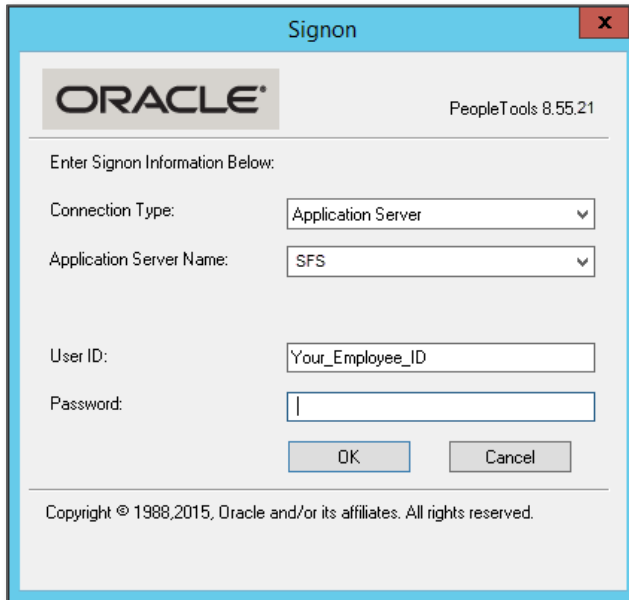Send Verification Email

Part 3- Oracle Authentication:

1. Now back on your desktop, **double click** the newly created icon for *nVision_85521* (.rdp file).

2. 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'.*

3. Next, an Oracle login screen should appear.

4. **Pick** your environment from the *Application Server Name* list if it does not default to SFS.

5. **Enter** your login credentials. Your EMPLID should be defaulted from the actions taken in step 11 above, if completed. The password is the same as your **backdoor (PSA) website logon** to SFS. **Click** the following link to test your credentials. https://portal.sfs.wisconsin.edu/sfs-BD/signon.html If you can log into the backdoor (PSA), you should be able to log into the client.

6. If you need to have your backdoor (PSA) password reset, please **call** the helpdesk at 608-264-4357.

7. The startup of the Windows-based client may take from a few seconds up to 1 minute to start. Please email the uwsaproblemsolvers@uwsa.edu if startup performance is more than a minute or is unacceptable to you. You will see this splash screen while it is loading:


8. For the nVision client, you will see the PeopleSoft splash screen and then Microsoft Excel will start. This is Excel running on the Remote Application Server and NOT locally on your machine. The Excel version may look different than your local Excel version. You will see the following nVision home page (nvsuser.xlsm) if all is successful…
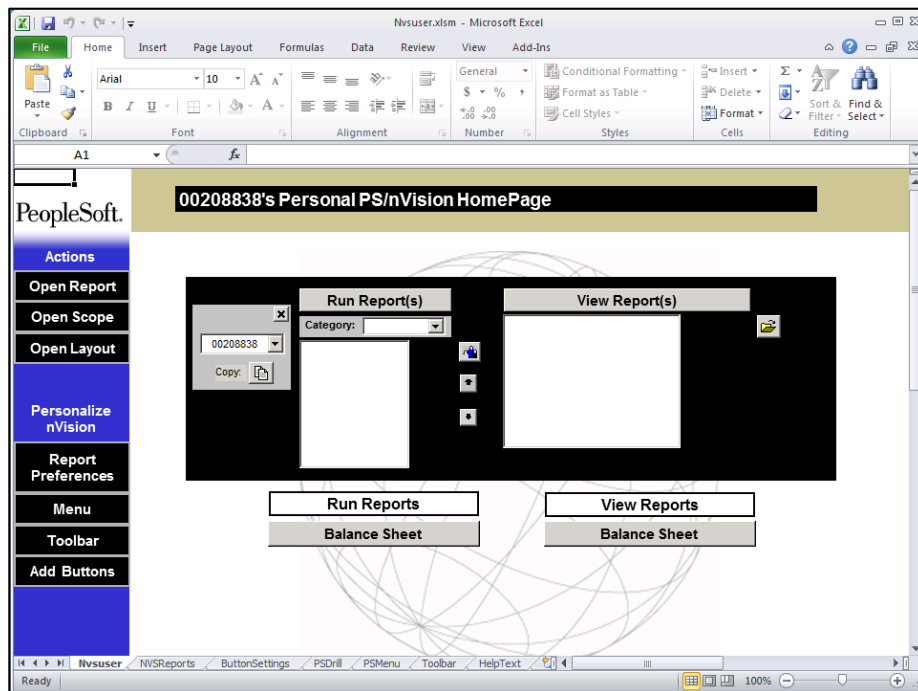
Notes About Local Drives and Printers:

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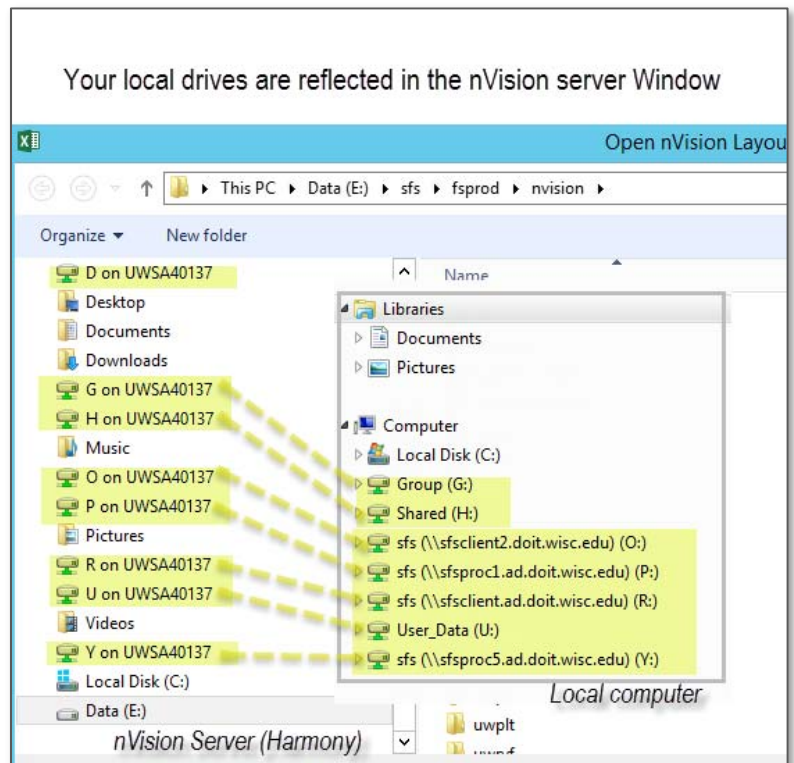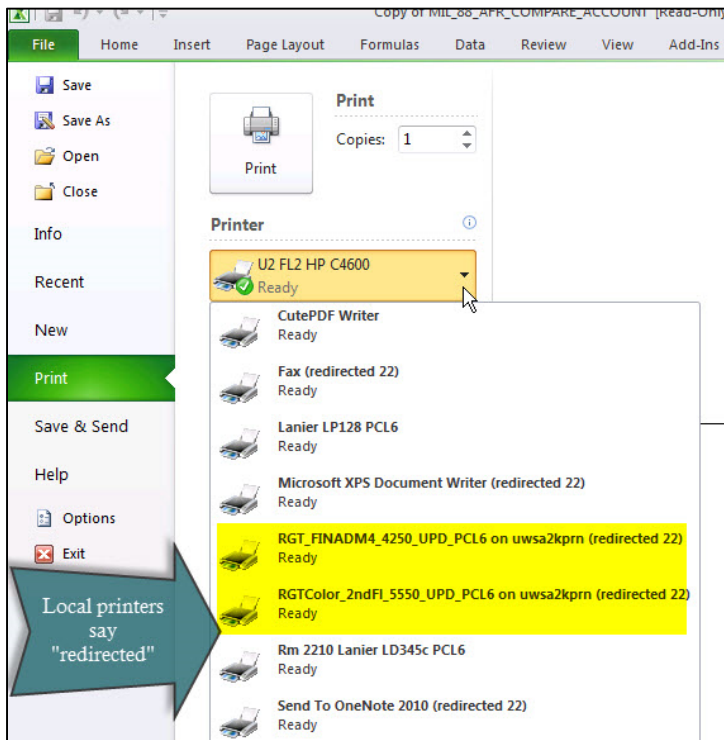
Your local printers will also show up when you try to print. You will see the word "redirected" next to your local printers. If you have any problems, contact UWSA Problem Solvers.