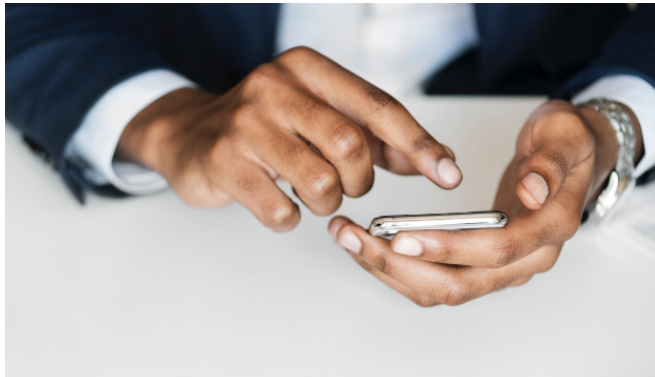


Seattle Children's

# Remote Work Toolkit



# Introduction

We recognize that working remotely comes with its own set of unique challenges. Seattle Children’s Information Technology team wants to make your remote work experience as easy and intuitive as possible by providing you access to the tools and applications you need to do your best work.

Please read on in this Remote Work Toolkit for self-help resources and more information on how you can best communicate, connect and collaborate. Click on a section in the “Table of Contents” below to jump to that section. Also, you will find the icons below in the top corner of each page. You can click on one of the icons to jump directly to that section. Live links to more information are also included in the toolkit.

	SELF-HELP RESOURCES
	HOW TO CONNECT
	HOW TO COMMUNICATE
	HOW TO COLLABORATE
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# Self-help Resources



# Glossary of Common Terms

**Canto:** An Apple iPad mobile app that provides secure access to clinic schedules, hospital patient lists, health summaries, test results and notes.

**Citrix:** Commonly used applications that are packaged and installed on a server, which are presented to your desktop when you launch them.

**DocuSign:** DocuSign is an approved application at Seattle Children's for signing most documents electronically.

**EPCS:** Electronic prescribing of controlled substances.

**Epic:** Seattle Children's electronic medical record system.

**Haiku:** An iPhone or Android mobile app that allows secure access to clinic schedules, hospital patient lists, health summaries, test results and notes.

**IT Service Desk:** Frontline IT staff who respond to customer calls and service ticket submissions.

**Microsoft Forms:** Microsoft Forms allows you to quickly and easily create custom quizzes, surveys, questionnaires, registrations and more.

**Microsoft OneDrive:** This cloud-based app allows you to access, edit and share your files on your personal devices or Seattle Children's devices whenever and wherever you are without having to log into Citrix. You can also share files and folders with your co-workers or others outside the organization, helping to avoid large email attachments.

**Microsoft SharePoint:** This tool allows you to securely share and manage files, content and data among a group for easy and secure collaboration. SharePoint is available through Citrix (the remote desktop portal) and as a cloud-based app to avoid going through Citrix.

**Microsoft Streams:** Microsoft Stream is a video service where you can upload, view and share videos securely. This may include meetings, presentations, training sessions, forums and much more. Through the tool, you can easily share comments and tag specific times in the video as reference points.

**Microsoft Teams:** Microsoft Teams is a digital hub that brings conversations, meetings, files and apps together in one place. This cloud-based app is available without logging into Citrix.

**M\*Modal:** A mobile app allowing clinicians to dictate clinical encounters and securely send the audio recording to a medical transcriptionist.

**Okta Verify:** An app on your smartphone or mobile device to grant you remote access to the network. Okta Verify ensures the security of protected patient health information (PHI).

**Remote Citrix:** The same Citrix but at your home. This includes the same access to your applications and files.

**ServiceNow:** The electronic tool used to submit IT service requests or report technical issues.

**VDI:** Stands for virtual desktop infrastructure. VDI allows you to log into your desktop remotely or through a VDI device within a Seattle Children's facility.

**VPN:** Stands for virtual private network. VPN is a security application that can be installed on a Seattle Children's-owned laptop to allow secure login to Seattle Children's network.

**Webex and Webex App:** Webex is a video conferencing tool for multiple functions. The Webex App bundles meetings, phones services and collaboration tools in one application.

**Webex App for Mobile and Webex App Softphone:** Applications allow you to extend your work extension to your cell phone (Webex App for Mobile) or Seattle Children's-provided computer (Webex App Softphone). Use these options if you need to call patients remotely—caller ID shows your Children's phone number.

**Wi-Fi:** A wireless networking technology that allows electronic devices to connect to the internet.

**Zscaler Secure Web Gateway:** Security application replacing VPN for logging into Seattle Children's network remotely from a Seattle Children's-owned device.

# Quick Reference Guide and Troubleshooting Resources

There are a variety of things you can do to improve your remote work experience. Check out these tips and tricks before contacting the Information Technology (IT) Service Desk or submitting your ServiceNow request. If you still need assistance, [learn how to contact IT for help](#).

## Check your internet speed

1. Visit [www.google.com](http://www.google.com).
2. Search “internet speed test.”
3. Click the box labeled “Run Speed Test.” It should take about 30 seconds to determine your internet speed.
4. If your internet speed is slow, please contact your internet service provider. (*Please note:* Seattle Children’s requires a minimum internet speed of 5MB per second. You may need a higher speed if you are using the internet on multiple devices in your household.)

### *Please note:*

- **Cable internet providers** (like Comcast) share bandwidth in an area. This means your internet speed will be slower when more people are logging on at the same time.
- **DSL and fiber internet providers** (like CenturyLink) have dedicated connections to your home so you should not experience changes in speed based on the number of users connecting at the same time.

## Maximize your Wi-Fi strength

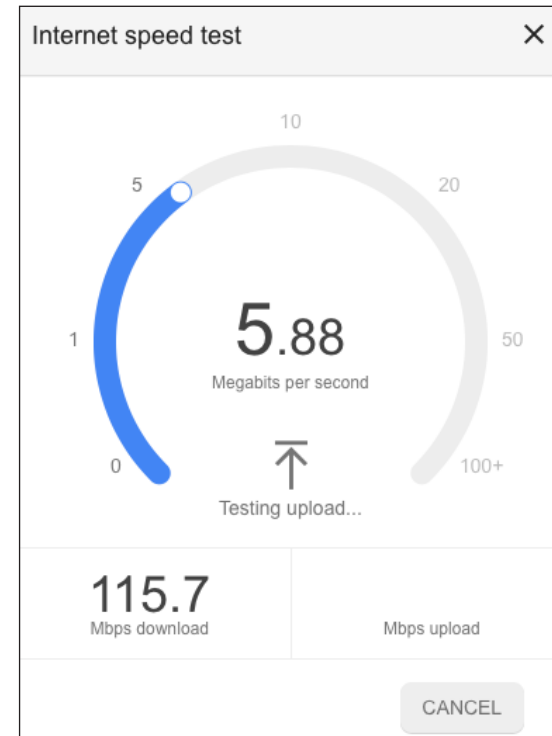
Set up your workstation close to your Wi-Fi router for a more stable connection to your remote Citrix portal.

## Ensure your network security

Learn how you can [boost the security of your home Wi-Fi network](#) to avoid attackers that can put you and Seattle Children’s at risk.

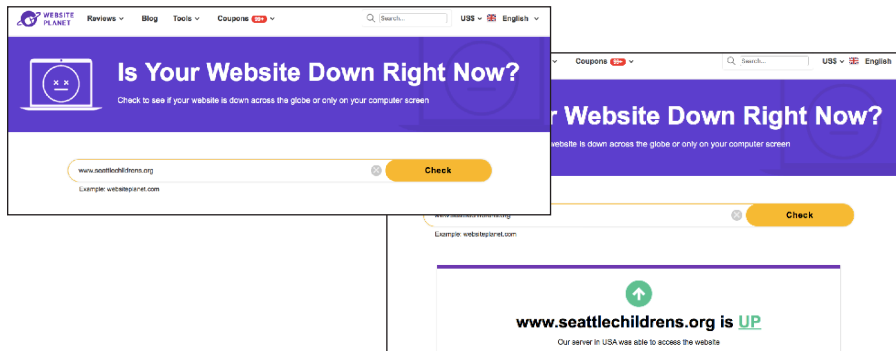
## Choose the best web browser

You can use whichever web browser works best for you. Our IT Service Desk team has found that Safari and Chrome tend to work best on a Mac, while Chrome and Firefox work well on a PC.



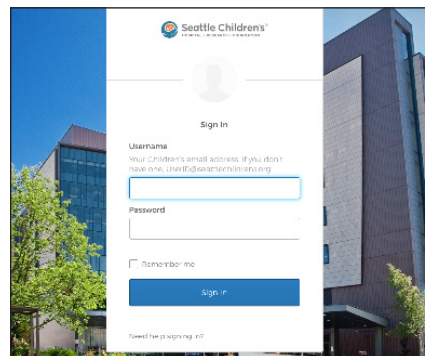
## Find out if a website is working

1. Visit [www.websiteplanet.com/webtools/down-or-not/](http://www.websiteplanet.com/webtools/down-or-not/).
2. Enter the website address in the search bar and click “Check.”
  - a. If the site you are searching for is down, you can continue checking to see if it comes back up.
  - b. If the site you are searching for is up and you cannot access it, there are a few tips that might help:
    - i. Clear your browser cookies or cache. (Since each type of web browser is different, you will need to do an internet search to learn how to clear your cookies or cache based on the type of browser you use.)
    - ii. Reboot your computer or device.
    - iii. Reset your Wi-Fi router (if the two previous steps do not work).



## Access Seattle Children’s apps without connecting to the Citrix portal

Visit [seattlechildrens.okta.com](http://seattlechildrens.okta.com) and log in from any web-connected computer. You will have access to many of Seattle Children’s applications (apps) without needing to connect to the remote desktop portal (Citrix).



## Change or reset your password remotely

If you remember your current password, you no longer have to call Seattle Children’s IT Service Desk if you would like to change or reset your network password.

*(Please note:* If you have a Seattle Children’s-owned Mac, please call the IT Service Desk at 206-987-1111 before changing your password. You must also call the IT Service Desk if you have forgotten your current password or it is not currently working. A self-service tool is coming soon to reset your forgotten password.)

To change your password:

1. Visit [password.seattlechildrens.org](http://password.seattlechildrens.org).
2. Enter your username then select either “Send SMS” to send to your phone or “Send Email.”
3. Enter the verification code sent to either your phone or email address.
4. Enter then reenter your new password based on the password requirements.
5. Click “Reset Password” when finished.

If you have a Seattle Children’s-owned laptop or desktop (Windows or Mac), continue to use your old password to unlock your laptop/desktop. You can use your new password for everything else. Once you return to a Seattle Children’s facility, the systems will sync with your laptop/desktop and you will only need to use your new password.

## Unlock your account

If you get locked out of your Seattle Children’s network account, follow these instructions. *(Please note:* You will need to make sure your mobile phone number and email setup is current through your Okta account. Visit [seattlechildrens.okta.com/enduser/settings](http://seattlechildrens.okta.com/enduser/settings) to add in your phone number and email address.)

1. Visit [seattlechildrens.okta.com/signin/unlock](http://seattlechildrens.okta.com/signin/unlock).
2. Enter your username then select either “Send SMS” to send to your phone or “Send Email.”
3. Enter the code sent to your phone or email address.



## Log into virtual meetings outside the remote desktop portal

- **Microsoft Teams:** For the best experience, connect to Microsoft Teams remotely (outside Citrix). [View the how-to guide to learn more about accessing and using Microsoft Teams.](#)
- **Webex:** For the best in-meeting experience with full audio and video, launch the Webex App locally from one of these devices:
  - **Seattle Children’s provided computer**
    - Launch the natively\* installed version of Outlook or the Webex App and join the meeting.
    - Launch a natively\* installed browser on the laptop and browse to [seattlechildrens.webex.com](https://seattlechildrens.webex.com), click “Sign In” and join your meeting from the “Upcoming Meetings” list or by entering the meeting number in the “Join a meeting” field.
  - **Personally owned computer**
    - Download the desktop Webex App from <https://www.webex.com/downloads.html>.
    - Install the Webex App natively\* on your computer.
    - Join your meetings from this natively\* installed version of the Webex App.
  - **Smartphone**
    - Follow the instructions in the [How-to Guide: Webex section](#) of this toolkit to install the Webex Meetings App and the Webex App on your smartphone.
    - Join your meetings from the Webex App on your smartphone.

\*The term *native* means outside of Seattle Children’s remote access portal.

Accessing Webex through Windows 10 VDI (both onsite and remote) is great for viewing content, but you may not have access to a microphone, speakers or camera through this connection. If you do have access to your local microphone, speakers and camera, the experience is substandard and this method is not recommended.

**Please note:** Any version of Outlook, Webex or Internet Explorer that begins with “Citrix” **should not be used for Webex**. Look for the version that does not include the word “Citrix.”

[View the how-to guide to learn more about setting up and using Webex.](#)

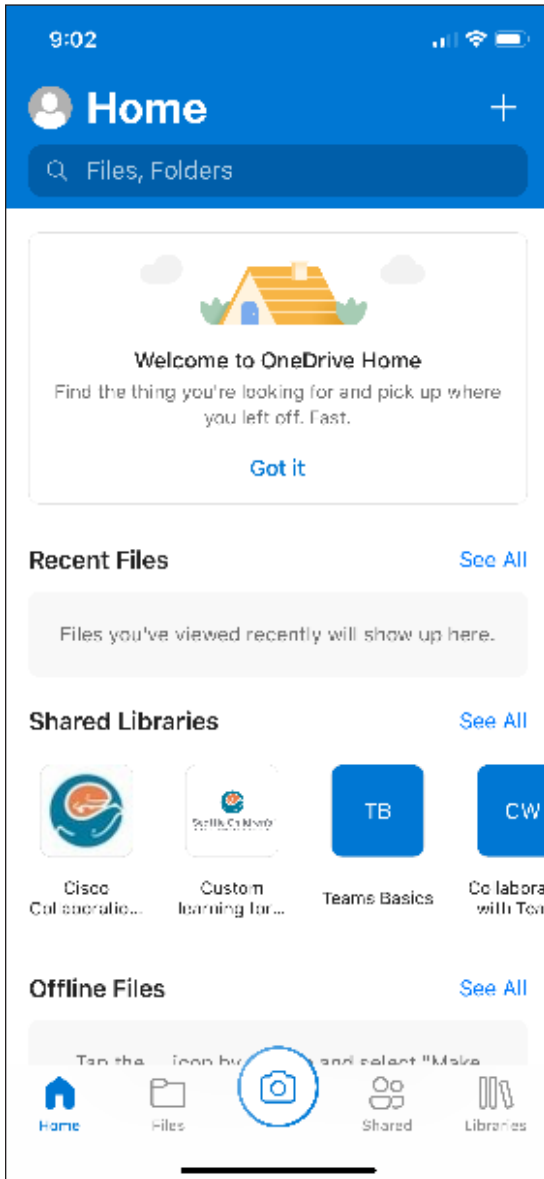
## Using Webex App for Mobile to make, receive and manage phone calls and send or receive chat messages on your personal phone

Webex App for Mobile is a smartphone application available on Android and Apple devices if you have a Seattle Children’s email address. The technology offers instant messaging and can display your current status (i.e., available, on a call, in a meeting, busy). If you already have a personally assigned Seattle Children’s phone number, the application can also function as your Seattle Children’s phone number when receiving or making phone calls anywhere that has access to the internet or cellular data.

1. Download Webex App for Mobile from your personal smartphone’s app store.
2. Submit this [ServiceNow form](#) to request access to Webex App for Mobile. (*Please note:* You will be asked to log into Seattle Children’s network to access the ServiceNow site.)
3. Read instructions on how to use Webex App for Mobile.

### **Other resources:**

- [Cisco Collaboration Tools \(SharePoint\)](#)
- [Cisco Site: Welcome to the Webex App](#)



## Use Webex App Softphone to make, receive and manage phone calls from your computer

Webex App Softphone can be used with individually assigned, or group, numbers. It requires the use of a Seattle Children's-provided computer.

The Webex App for Mobile allows you to use your smartphone for your Seattle Children's phone services. The Webex App Softphone allows you to use the Webex App on your Seattle Children's provided computer (if you have one) for your phone services.

1. Submit this [ServiceNow form](#) to request access to Webex App for Mobile or Webex App Softphone. (*Please note:* You will be prompted to log into Seattle Children's network to access ServiceNow.)
2. From your Seattle Children's provided computer, make sure you are connected to the network.
3. Read more about Webex App Softphone:
  - a. [Webex App - Getting Started](#)
  - b. [Webex App Softphone Quick Start Guide](#)

## Check your Seattle Children's voicemail remotely

There are two ways to check your voicemail from home.

- Use Webex App for Mobile or Webex App Softphone to check your voicemail; or
- Dial 206-987-8686; press \* when Unity Connection answers; enter your extension and press # (if prompted), then enter your PIN and press #.

Review these easy instructions for more information on [checking your voicemail](#).

## Sending a fax by email

The Concord fax system will dial a fax number and convert and deliver an email as a regular fax to the recipient. Review these easy instructions to [send a fax through your Outlook email account](#).

## ◀ Accessing your files from anywhere with Microsoft OneDrive

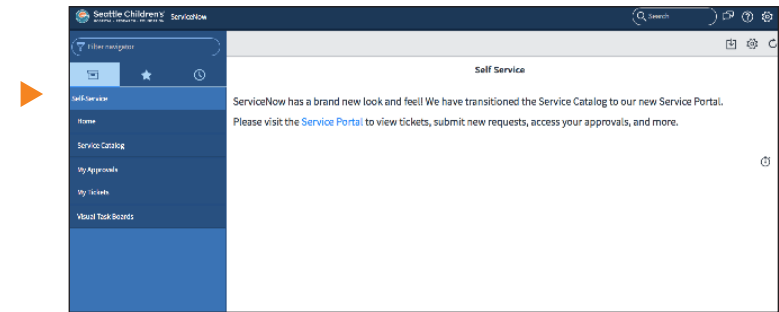
The cloud-based Microsoft OneDrive app allows you to access, edit and share your files on your personal devices or a Seattle Children's laptop whenever and wherever you are without having to log into your remote desktop portal (Citrix). You can also share files and folders with your co-workers or people outside the organization, helping to avoid large email attachments. [Review this additional information on Microsoft OneDrive](#).



# Who to Contact for Help

The IT Service Desk is available to Seattle Children's staff and faculty members.

- **Non-urgent IT issues:** Non-urgent issues that do not cause a work stoppage. An example is an email issue where the user has other ways to access email. Instead of calling the Service Desk, please submit a [ServiceNow](#) request. ServiceNow is an electronic tool used to submit IT service requests or report technical issues. (*Please note:* You will be asked to log into Seattle Children's network to access the ServiceNow site.)
  - **If you submit a request during regular hours** (Monday through Friday from 6 a.m. to 6 p.m.), someone from IT will respond to your request within two hours.
  - **If you submit a request after hours**, you will hear from someone from IT on the next business day.
  
- **Urgent IT issues:** Urgent issues prevent you from doing your work, like problems with CIS, Epic or Lawson.
  - Call the IT Service Desk (available 24 hours/day, seven days a week) at 206-987-1111 (or ext. 7-1111 if working from a Seattle Children's facility).
    - o Choose option 1 for general IT issues;
    - o Choose option 2 for issues related to Epic or telehealth services.
  
- **Non-IT issues:** Please view [this contact information on CHILD](#) for other departments that may handle your non-IT issues.



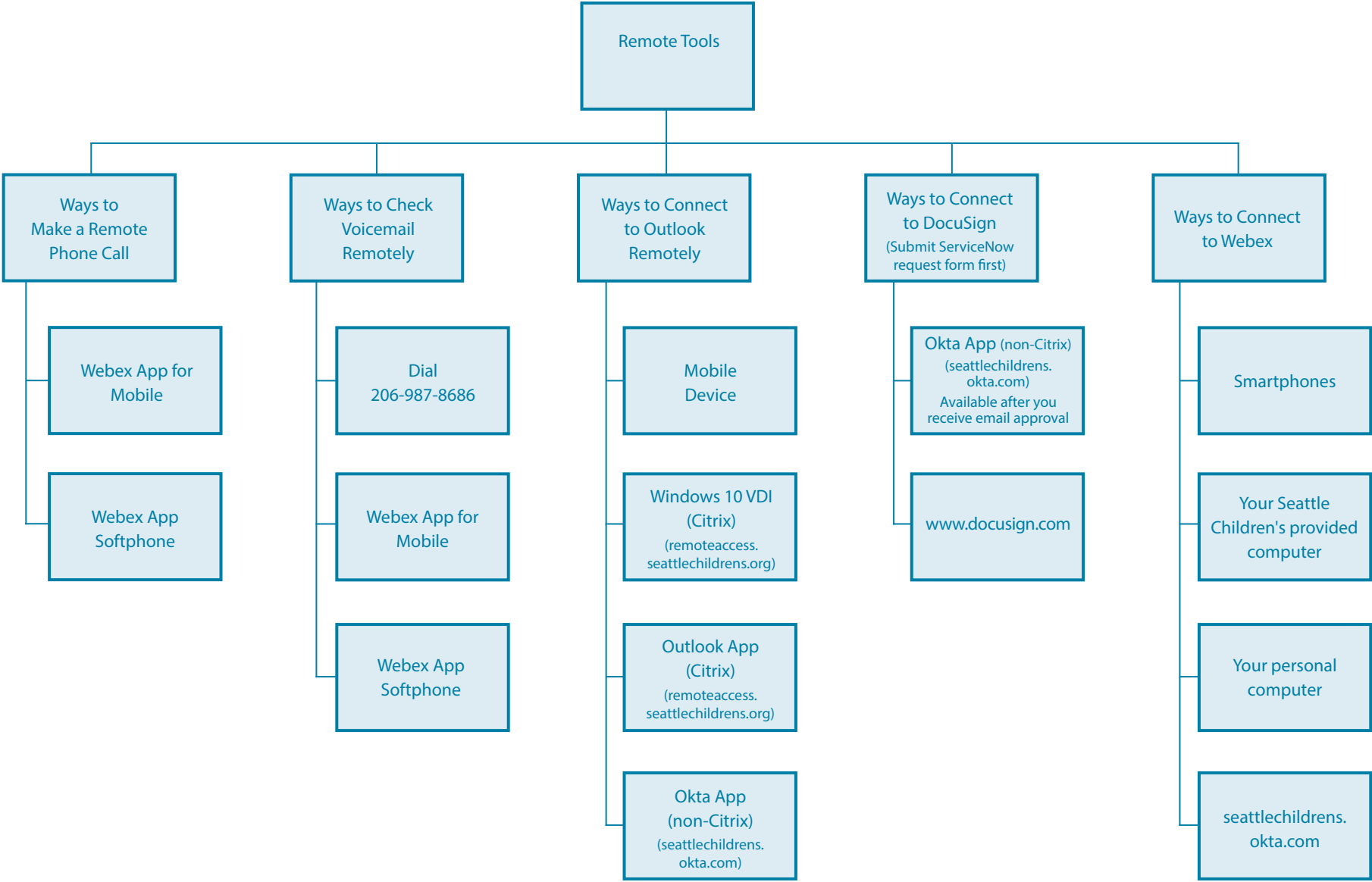

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**Call 206-987-1111**  
IT Service Desk for urgent IT issues.

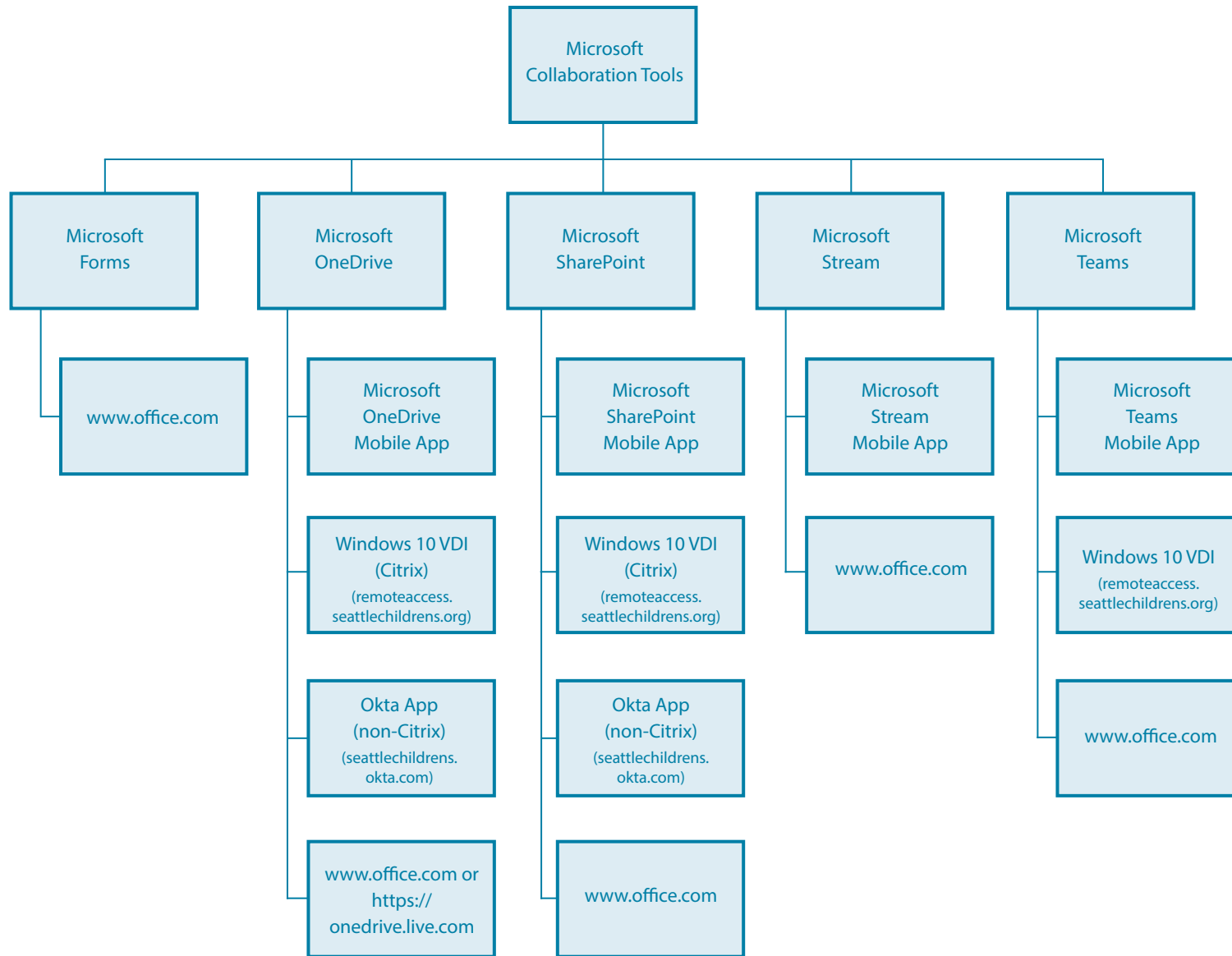
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# Remote Tools



# Microsoft Collaboration Tools





# How to Connect

# Securing Your Network Before Connecting

When working remotely, the security of your home Wi-Fi network is very important. A poorly secured network is vulnerable to attackers and could put you and Seattle Children's at risk. [Read Seattle Children's policy on working remotely.](#)

Since home routers can vary, you may need to search online for instructions about your specific router. (For specific instructions on your router, search "change<router brand><Model Number>password" in a web browser). Please remove the < > symbols before you search.

Here are standard instructions about what to do to secure your home router.

We recommend:

- Changing your administrative password on your router (this is different from your Wi-Fi password). This is a standard security practice due to the default password being searchable through the internet;
- Disabling remote administration to help prevent an attacker from taking control of your router over the internet;
- Updating router firmware to ensure any security fixes are applied from the vendor; and
- Configuring your Wi-Fi security settings to help prevent people from sitting outside your home, accessing your Wi-Fi and attempting to attack your network from the inside

Here's how:

*(Please note:* These instructions may differ based on the type of router you are using.)

## 1. Log onto your home router's online settings.

- a. **Find the label on your router.** Sometimes the label will list your default IP address, administrator name and password.
  - i. Enter the default IP address in a new web browser and click "Enter." Your IP address will look something like: "123.456.7.8." Example: visit <http://123.456.7.8> (the number should be your router's IP address in place of example).
- b. **If you cannot find the default IP address:**
  - i. Go to your computer's settings and select "Network."
  - ii. Look for the "Router IP" or "Default gateway." It will look something like: "123.456.7.8."
  - iii. Enter the default IP address in a new web browser and click "Enter."

*Please note:* If you do not have your username or password and cannot log in, you may need to call the support line of your router's manufacturer for assistance.

Once logged into your router's online settings, stay on the screen to complete the remaining steps outlined below.

## 2. Change the administrator password.

- a. Go to the administration section and click to "Change Password" (if not prompted to change it when logging in for the first time).  
*Please note:* long passwords are preferred.
- b. We recommend storing the credentials into a password manager program so you can reference them, when needed, to routinely check for updates on your router.
  - If you are not already using a password manager program, simply search on the internet for "top password manager" and find the one that works with your system or phone to store passwords.



**3. Disable remote administration** to ensure that others from outside your home are not able to change your settings.

- a. Look for a button or section titled “Remote administration or “Remote management.”
- b. Select “Disable” or uncheck the “Enable” box.

**4. Update your router firmware** to eliminate known cybersecurity vulnerabilities and improve performance. If available, select “automatic updates” so you are always current.

*Please note:* If you received your router from your internet service provider, call their support line for firmware update questions. If you purchased your router from a third party, follow the manufacturer’s instructions on how to update your firmware.

**5. Configure your Wi-Fi security settings** by checking SSID, encryption method and Wi-Fi password.

- a. Locate wireless setup. (Refer to your router’s instructions to learn where to find this.)
- b. Change the default SSID to the name of your choice.
- c. Check the encryption level (should be WPA2 with AES security setting selected).
- d. Disable WPS or Enable WPS but disable WPS PIN Methods. (WPS stands for Wi-Fi protected setup.)
- e. Set or change your Wi-Fi password using a complex password that will not be easy to guess (do not use your admin password).





# Roadmap to Setting Up a New Device

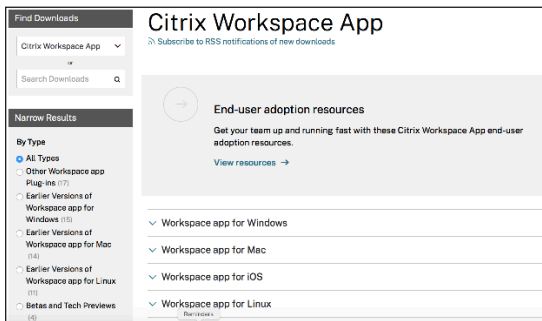
## Setting Up Your Mobile Phone

Use your mobile device:

- To verify your access to your remote portal with Okta Verify (see *directions below*),
- As your work phone using your Seattle Children's phone number (*see information on Webex App for Mobile and Webex App Softphone*)
- To check your Seattle Children's email address (*see information on setting up Outlook on your mobile device*)

### **Additional information on electronic prescribing of controlled substances (EPCS) on mobile devices:**

You will need Imprivata ID on your mobile device in order to approve electronic orders for controlled substances using a two-factor authentication process. Once you install Intune using the steps above, Imprivata ID will automatically be pushed to your device.



## Setting Up Your Personal Computer (PC or Mac)

To work remotely on your personal computer, follow these steps:

### 1. Install Citrix

- Visit <https://www.citrix.com/downloads/workspace-app/>.
- Choose the appropriate Citrix Workspace App from the list based on your device (i.e. Windows, Mac) and click on the button to download the Citrix workspace app.
- Download and run the installer.
- Follow the on-screen prompts until it asks you if you would like to add an account.
- Click “Finish” to close out of the installer. The installer does not require an account to be added.

*Please note:* Make sure to check the box that says “Do not show this window automatically at logon” and close it out.

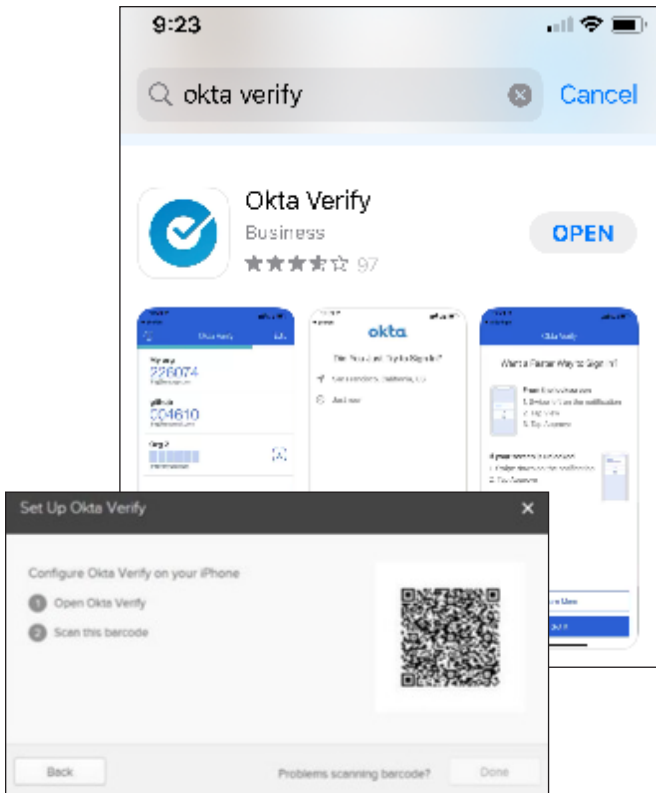
### 2. Set up Okta Verify

Seattle Children’s uses Okta Verify — an app on your smartphone or mobile device — to grant you remote access to the network. Okta Verify ensures the security of protected patient health information (PHI).

Contact the IT Service Desk at 206-987-1111 if you already have Okta Verify set up on another device but need to add it to a new phone. The IT Service Desk will reset your verification.

Follow these directions to set up Okta Verify. (View [directions with job aids](#).)

- Go to the app store on your smartphone or mobile device and search for “Okta Verify” (not “Okta Mobile”).
- Install the free “Okta Verify” app on your phone (Apple, Windows, Google, Android). (Follow the device instructions to add the app to your Apple Watch.)
- Visit <http://seattlechildrens.okta.com> on your personal computer or Seattle Children’s workstation.
- Once on the site:
  - If you have a Seattle Children’s email address:** Log in using your Seattle Children’s email address as your User ID then enter your network password. (*Please note:* If your email address has changed, you may need to use your original email address as your username.)
  - If you do not have a Seattle Children’s email address:** Log in using *UserID@seattlechildrens.org* as your username then enter your network password. (Replace the “UserID” in the address with your actual user ID when logging in. Example: *abest1@seattlechildrens.org*. *Please note:* This is not an email address).



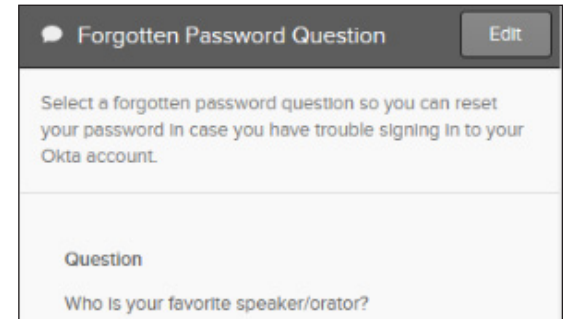
e. **Update your Okta account’s password recovery.**

Complete these steps during your first log-in so you can take advantage of self-service options if you have trouble logging on in the future. (*Please note:* only one method below is necessary for password recovery.)

- i. Enter a phone number and add text message verification for password recovery.
- ii. Add a secondary email address for password recovery.
- iii. Choose a security image.
- iv. Select “Create my account.”

f. **Set up Okta Verify on your computer or workstation.**

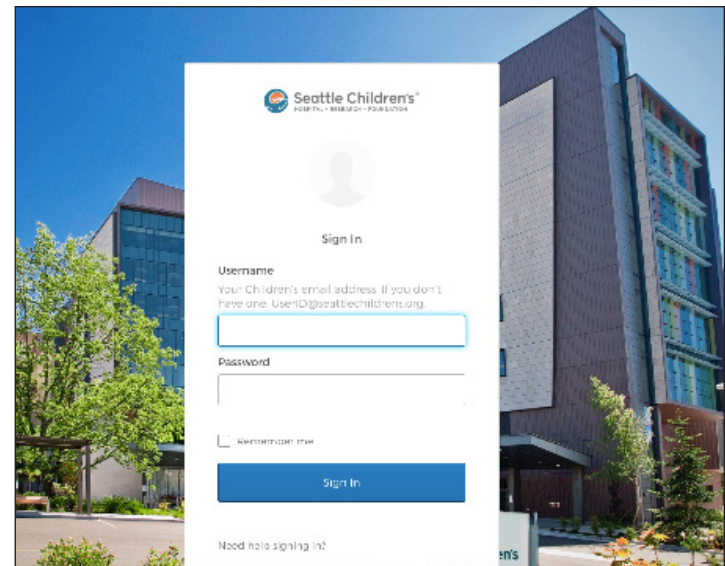
- i. Click on your name in the upper righthand corner.
- ii. Select “Settings” in the drop-down menu.
- iii. Scroll down to the “Extra Verification” section and click “Setup” next to Okta Verify.
- iv. Select your device type and click “Next.”
- v. A QR code will display on your computer screen. Do not close the screen.
- vi. Go to your mobile device and launch the Okta Verify app.
- vii. Select “Add account” or click the “+” sign to turn the camera on.
- viii. Hold your phone so the QR code on your computer fits inside the box on the screen. Once captured, the QR code disappears.
- ix. Once a screen with a six-digit code appears, your account is registered. You can ignore the code and close the app.



**3. Log into Citrix**

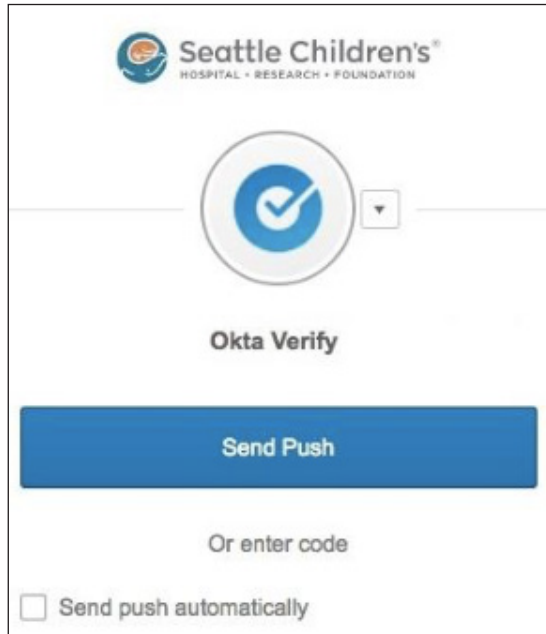
Logging into Citrix gives you the same access to your applications and files available at your workstation. You can either connect through the virtual desktop infrastructure (VDI) environment and see a remote copy of the desktop at your workstation or connect to various apps within the Citrix environment where you can access your files or files on Seattle Children’s shared drives.

- a. Visit <http://remoteaccess.seattlechildrens.org> on your computer or tablet device.
- b. Enter your username (your Seattle Children’s email address (if you have one) or *UserID@seattlechildrens.org*) and your regular network password to log into Okta. (*View instructions in step 2 above to set up Okta Verify for the first time.*)
- c. After entering your username and password, you will be asked to send a push notification to your mobile phone. Click “Send Push.”



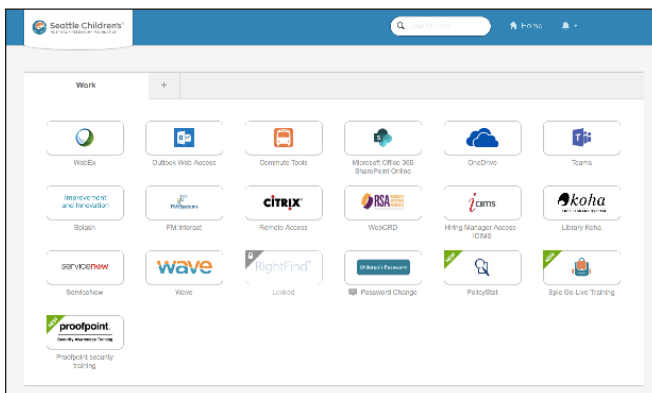


- d. Your phone will launch the app automatically. Tap “Yes, it’s me” and the remote portal will load on your computer or device. (Tap “Accept” if your phone asks before launching the app.)
- e. You will need to download and install Citrix if this is the first time logging into Citrix (see directions under item 1).
- f. During your first time logging into Citrix, you’ll be presented with a button labeled “Detect receiver.” Click on it.
- g. When the next screen comes up, click on the link that says “Already installed.” It will take you through to your Citrix remote access options.
- h. From here:
  - i. Click on the “Apps” tab to access many of the most commonly used applications (including Outlook, other Microsoft programs, web browsers, clinical applications like Epic, Commute Tools, ETM for time sheets and schedules, ServiceNow and much more). This is a good option if you want to access just a couple of specific apps.
  - ii. Or, click on the monitor icon for Windows 10 VDI under the “Desktops” tab to open a remote session. (*Please note:* During the first log-in, you may be asked for your permission. If so, approve the session.) VDI is a good option if you need access to file shares or your whole desktop.



**4. Access Outlook and various applications without connecting through the remote desktop portal (Citrix).**

- a. Visit [seattlechildrens.okta.com](http://seattlechildrens.okta.com).
- b. Enter your username (your Seattle Children’s email address (if you have one) or *UserID@seattlechildrens.org*) and your regular network password to log into Okta. (*View instructions in step 2 above to set up Okta Verify for the first time.*)
- c. After entering your username and password, you will be asked to send a push notification to your mobile phone. Click “Send Push.”
- d. Your phone will launch the app automatically. Tap “Yes, it’s me” and the remote portal will load on your computer or device. (Tap “Accept” if your phone asks before launching the app.)
- e. Once logged in, you can click on several apps to use the programs without needing to log into Citrix. This includes Outlook, Webex, Microsoft SharePoint, Microsoft Teams, OneDrive, Wave, Citrix, ServiceNow and more. There’s also a “Password change” app so you can change your Seattle Children’s password without having to contact the IT Service Desk (in most cases).



## Setting Up Your Seattle Children's Laptop or Desktop

**For SC@Work Office Kit Recipients:** Complete the following extra steps the first time you log in to your SC@Work computer. You'll be asked to set your password. If you already have a network password (from working onsite or using another computer), skip to the next section.

1. **Set Your Password** (*Please note:* If you already have a network password from working onsite or using another computer, skip to step 2.)
  - a. **If you are at a Seattle Children's facility and connected to the network:**
    - i. On your Windows 10 VDI or PC, log in with your UserID and temporary password (provided by your manager when your account was first set up).
    - ii. At the prompt, change your password by following the on-screen instructions.
    - iii. On your SC@Work computer, log in with your new password.
  - b. **If you are on a personal device from anywhere:**
    - i. Open a web browser and go to <https://seattlechildrens.okta.com>.
    - ii. Log in to Okta with your Seattle Children's email address and temporary password.
    - iii. At the prompt, change your password following the on-screen instructions.
    - iv. On your SC@Work computer, log in with your new password.
2. **Log Into Your Seattle Children's-Provided Computer.** If your computer is shipped to you directly and you are logging on for the first time while offsite, follow these instructions.
  - a. **Navigate to the Windows login screen and connect to the internet.**
    - i. Turn your computer on.
    - ii. Press Ctrl+Alt+Del to reach the logon screen, but do not log in yet.
    - iii. In the lower right corner of the screen, choose the WiFi icon and select your local WiFi account. (*Please note:* If your computer is connected directly to the Internet through an ethernet cable, skip this step.)
  - b. **If your device has Zscaler,** do the following while on the login screen and connected to the Internet:
    - i. Enter your Seattle Children's email address and password, and select "Enter."
    - v. Enter your Seattle Children's UserID and password, and press "Enter."
  - b. **If your device has F5 VPN,** do the following while on the logon

screen and connected to the Internet:

- i. Click the network icon to the left of the WiFi icon.
- ii. Confirm that an SCH F5 VPN Adapter is selected (either one works).
- iii. Enter your Seattle Children's UserID and password, and press "Enter."
- iv. Follow the prompts to complete the multi-factor authentication (this may take up to five minutes).

## Remote Access Using a Seattle Children's Computer

While working remotely, some applications will be accessible over a simple Internet connection. However, many more applications will require additional verification and security. Depending on your computer setup you will use one of the following methods to connect.

### 1. If your computer has Zscaler:

- a. Search for "Zscaler" in the Windows search field and launch.
- b. Double-click the Zscaler icon in the system tray on the lower right edge of the screen.
- c. On the Private Access screen do the following:
  - i. Click "Authenticate."
  - ii. Enter your Username (email address) and password.
  - iii. Follow the prompts to complete multifactor authentication.
  - iv. You are now logged in and will be able to access Seattle Children's resources.
- d. *Please note:* Zscaler will remain connected for the next seven days. Once Zscaler is running, do NOT connect to VPN.

### 2. If your computer only has VPN:

- a. Find and double-click on the Children's F5 VPN shortcut on the desktop.
- b. Select "Connect" in the F5 VPN window.
- c. You are now logged in and will be able to access Seattle Children's resources.
- d. *Please note:* VPN will expire daily, or every time you restart.
- e. You must use the Citrix browser to access Library resources (via Okta, Remote Portal or Citrix Workspace).

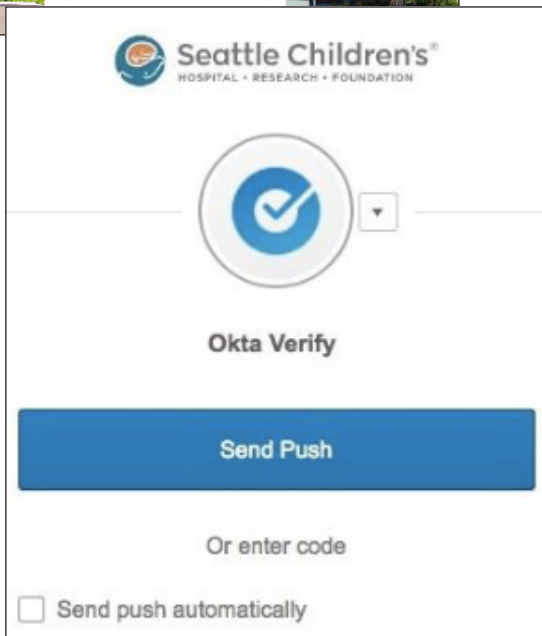
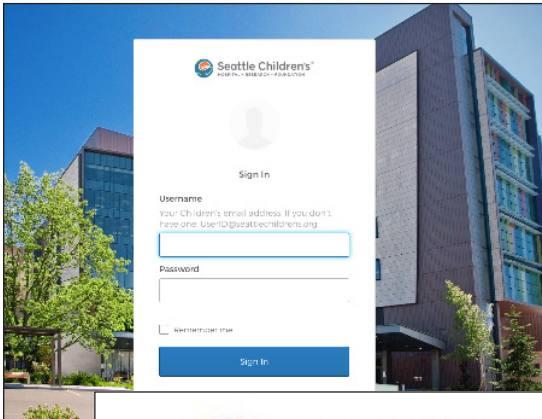
### 3. Use the Okta Portal to access applications directly

- a. Visit <https://seattlechildrens.okta.com>.
- b. Enter your Seattle Children's email address and password.
- c. Follow the prompts to complete multifactor authentication.



#### 4. Use Citrix Remote Portal

- Visit <http://remoteaccess.seattlechildrens.org> to access Citrix.
- From the Citrix Remote Portal double-click on Windows 10 VDI to launch a full desktop or click on Apps to launch individual applications.
- Wait for your desktop profile to load in a self-contained pop-up window.
- On the Windows logon screen enter your Seattle Children's email address and password and follow the prompts to complete multifactor authentication.



#### Remote Access Using a Personal or Vendor-Provided Computer

Additional verification and security is required to access Seattle Children's resources from a computer that is not owned and managed by Seattle Children's

Follow these directions for remote access:

- Visit <http://remoteaccess.seattlechildrens.org> on your computer or tablet device to access Citrix or visit [seattlechildrens.okta.com](http://seattlechildrens.okta.com) to access some of your applications remotely without going through Citrix (the remote desktop portal).
- Enter your username [your Seattle Children's email address (if you have one) or *UserID@seattlechildrens.org*] and your regular network password to log into Okta. *(View instructions above to set up Okta Verify for the first time.)*
- After entering your username and password, you will be asked to send a push notification to your mobile phone. Click "Send Push."
- Your phone will launch the app automatically. Tap "Yes, it's me" or "Approve" and the remote portal will load on your computer or device. (Tap "Accept" if your phone asks before launching the app.)

For additional help, watch "[How to Log Into the Remote Portal From Your PC](#)" (1:46) for help.

#### Printing From SC@Work Devices to Personal Printers

- Submit an [Exemption request](#) from within the Seattle Children's network asking to be able to print to a personal printer at home.
- Once your request is approved by Security, the Service Desk can assist you with connecting to the printer.

*Please note:* To print with a wireless printer, you will need to open the document that needs to be printed and disconnect from the VPN to print. Then, you will need to reconnect to the VPN to continue working.

The reason for this is that wireless printers are connected to the individual's home wireless network, but when logged into the VPN, the individual is technically connected directly to the Seattle Children's network. Disconnecting from the VPN changes the individual back to their home wireless network, where the computer can "see" the printer.





# How to Communicate



# How to Check Voicemail



To access your Seattle Children's voicemail outside of Seattle Children's:

1. Dial 206-987-8686.
2. Press \* when Unity Connection answers.
3. If prompted, enter your extension and press #.
4. Enter your PIN and press #.

Keep this [Voicemail Quick Reference Card](#) (available through CHLD) readily available to learn how to use your voicemail more efficiently.

## Checking Voicemail Through Webex App for Mobile

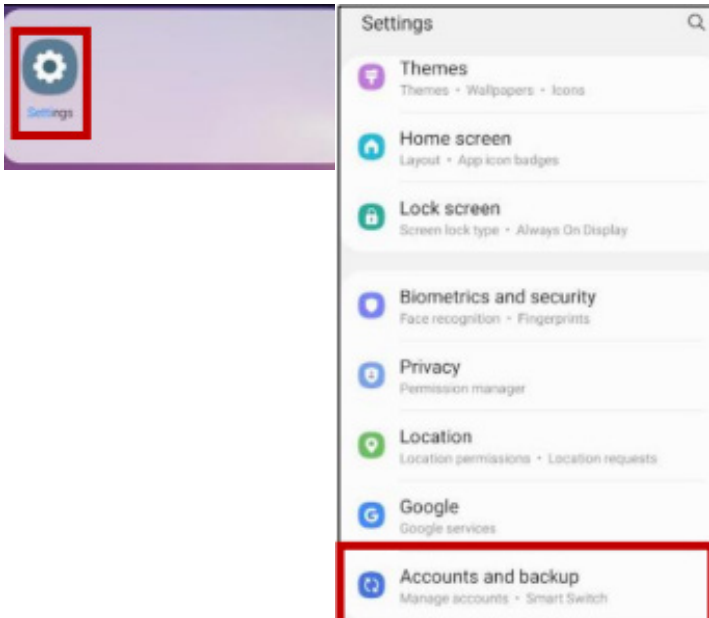
If using Webex App for Mobile as your work phone, open the app on your smartphone and check your voicemail messages by tapping on "Calling" and then "Voicemail."

# How to Set Up Seattle Children's Email on Your Mobile Device

You will need to submit a Mobile Device Consent Request Form before setting up your Seattle Children's email on a mobile device (whether a personal or Seattle Children's mobile device). Here's how:

1. Log into your [ServiceNow account](#). (*Please note:* You will be asked to log into Seattle Children's network to access the ServiceNow site. ServiceNow is also available through the ServiceNow app when logging in through [remoteaccess.seattlechildrens.org](https://remoteaccess.seattlechildrens.org).)
2. Search for the "Mobile Device Consent Request Form."
3. Read the information on the page.
4. Enter your name (your name may be automatically populated).
5. Choose "Yes" or "No" when asked if you currently connect to any personal or company-owned mobile devices to the Seattle Children's network.
6. Check the box acknowledging that you agree to the usage terms.
7. Click on the blue box that says "Add" to add your mobile device (unless your mobile device is already listed in the section below).
  - After clicking on the "Add" button:
    - Choose your type of device from the drop-down menu.
    - Choose "Personal," "Seattle Children's" or "Other" from the "Owner" drop-down menu.
    - Insert your phone's manufacturer into the text box (i.e. Apple, Android, Samsung, etc.)
    - Insert the model of your phone (i.e. iPhone 11, Android 10, Samsung Galaxy S20, etc.)
    - Click "Add."
8. Add any additional information or whether you need additional people to have visibility to the ticket in the free-form fields at the end of the page.
9. Click "Submit."



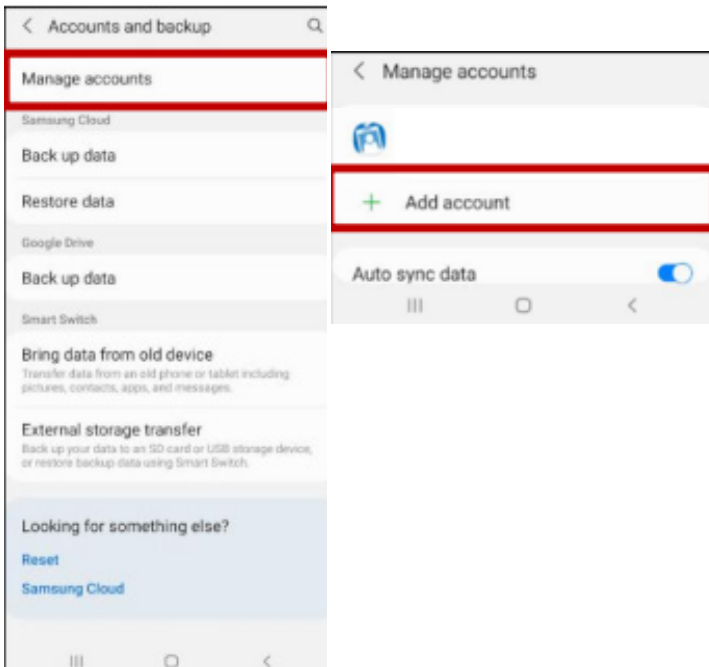


## Setting Up Seattle Children's Email on Your Mobile Device

After completing your "Mobile Device Consent Request Form" through ServiceNow (see *directions above*), follow these steps based on the model of your mobile device:

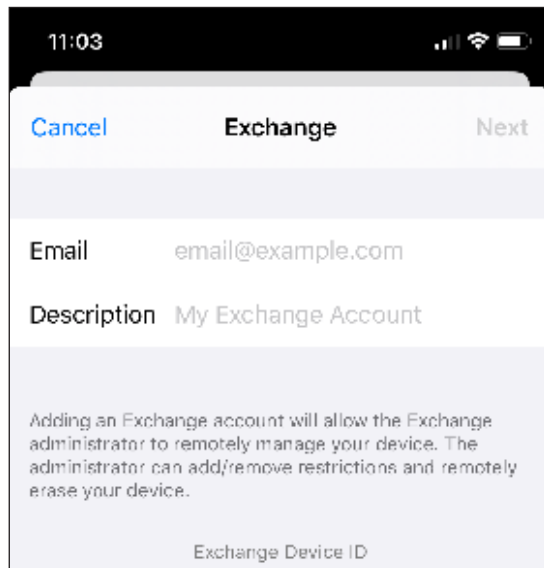
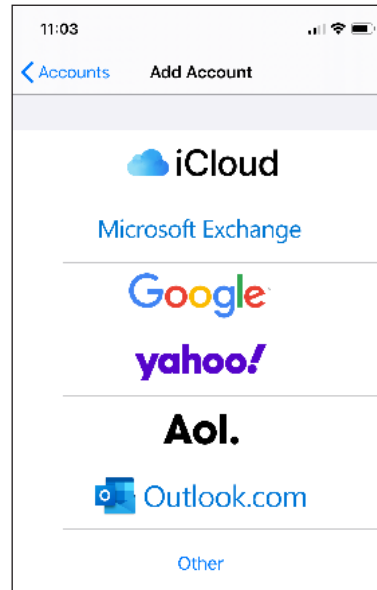
### Android

1. Go to "Settings" on your phone's home screen.
2. Tap "Accounts and backup."
3. Select "Manage Accounts."
4. Choose "Add account" at the bottom of the screen.
5. Select "Microsoft Exchange ActiveSync."
6. Select "Add your email address."
7. Add your Seattle Children's email address and password and tap "Sign In."
8. If the device does not automatically detect the server settings, enter the following information:
  - a. Email address (your first.last@seattlechildrens.org)
  - b. Domain\username (the domain is childrens, then include \ and your username)
  - c. Password (your Seattle Children's network password)
  - d. Exchange server (email.seattlechildrens.org)
9. Leave "Use secure connection (SSL)" checked.
10. Accept all SSL certificates.
11. Tap "Next."
12. A "remote security administration" pop-up window will appear. Tap "OK" when asked if you want to finish setting up the account.
13. To set up your sync options, select "Email, Contacts, Calendar" and any other sync preferences you choose. If this is your primary email account, also choose "Send email from this account by default."
14. Tap "Next."
15. You will receive a message saying your account is set up. You can choose a name for your account or leave it as the default. Tap "Next."
16. After connecting to your Seattle Children's email, you will be required to set a four-digit screen lock.



## Apple iPhone

1. Go to “Settings.”
2. Choose “Mail.”
3. Tap “Add Account.”
4. Choose “Microsoft Exchange.”
5. If you receive a prompt, choose to “Configure Manually.”
6. Enter the following information:
  - a. **Email:** Your Seattle Children’s email address
  - b. **Server:** email.seattlechildrens.org
  - c. **Domain:** childrens
  - d. **Username:** Your Seattle Children’s email address
  - e. **Password:** Your network password
  - f. **Use SSL:** Turn “on”
  - g. **Description:** You can add a name for the account (i.e. Children’s email)



7. After connecting to your Seattle Children’s email, you will be required to set a four-digit screen lock.



# How to Make or Receive a Phone Call Outside of a Seattle Children's Facility

Seattle Children's offers Webex App for Mobile and Webex App Softphone which allow you to carry your personally assigned Children's phone number with you wherever you go.

## Webex App for Mobile

Webex App for Mobile is a smartphone application available on Android and Apple devices if you have a Children's email address. The technology offers instant messaging and can display your current status (i.e., available, on a call, in a meeting, busy). If you already have a personally assigned Children's phone number, the application can also function as your Children's phone number when receiving or making phone calls anywhere that has access to the internet or cellular data.

## How to Request Webex App for Mobile

Request Webex App for Mobile access by submitting this [Webex App for Mobile and Webex App Softphone request form](#). Choose "Mobile device" from the drop-down menu for the type of device. If you do not already have a personally assigned Children's phone number, we will help you get one.

## What to Expect When Using Webex App for Mobile

- Outbound calls made from Webex App for Mobile will display the general Children's caller ID and caller name.
- Webex App for Mobile will function with any internet connection.
- If there is no WiFi available, Webex App for Mobile uses cellular data if enabled on your smartphone.
- Call quality is subject to the signal strength of your WiFi or cellular connection.
- Active calls may be disrupted if roaming from WiFi to cellular data.
- Webex App for Mobile should **NOT be used for 911 calls**. Failure to click "OK" at the E911 notification pop-up will result in disabled phone services.





## Webex App Softphone

Webex App Softphone allows the use of the local installation (not Citrix or VDI) of the Webex application on your Seattle Children's laptop or PC to be used as your phone if you have a Seattle Children's email address and personally assigned Seattle Children's phone number.

### How to Request Webex App Softphone

Request Webex App Softphone access by submitting this Webex App for Mobile or Webex App Softphone Request catalog item, choosing "Workstation" in the drop-down menu asking what type of device. If you do not already have a personally assigned Seattle Children's phone number, you will not qualify for this service.

### What to Expect When Using Webex App Softphone

- A USB headset is required. Seattle Children's Information Technology team has tested and recommends the Plantronics Blackwire C3215 (Lawson part number 53944).
- Webex App Softphone requires an internet connection and the F5 VPN when working remotely, for best results. (*Please note: F5 VPN is only available through your SC@Work computer.*)
- Call quality is subject to the signal strength of your WiFi or internet connection.
- Webex App Softphone should **NOT be used for 911 calls**. Failure to click "OK" at the E911 notification pop-up will result in disabled phone services.



# How to Send a Fax Through Microsoft Outlook

The Concord fax system will dial a fax number and convert and deliver an email as a regular fax to the recipient.

Follow these easy instructions to send a fax through your Outlook email account:

1. Log into your Seattle Children's Outlook account.
2. Open a new email.
3. In the "To" field, type the fax number followed by @concordsend.com (example: 2065555555@concordsend.com)
4. Attach the document you wish to fax. (*Please note:* If you are faxing multiple documents, attachments in the email will be faxed in the order they are attached.)

5. Add a subject line and/or message in the body of the email. (*Please note:* A Seattle Children's cover page will automatically be attached. What you write in the subject line and/or message body of the email will appear on the cover sheet as "Subject" and "Message.")
6. Click "Send."

For more information, check out our [training video](#) on how to fax through Outlook.



# How to Collaborate



# Collaboration Tools for Working Remotely

Seattle Children's offers several tools to help you collaborate with other team members while working remotely, including:

*(Please note: Click on the links below to learn more about setting up and using these tools.)*

1. **DocuSign:** DocuSign is an approved application at Seattle Children's for signing most documents electronically.
2. **Microsoft Forms:** Microsoft Forms allows you to quickly and easily create custom quizzes, surveys, questionnaires, registrations and more.
3. **Microsoft OneDrive:** This cloud-based app allows you to access, edit and share your files on your personal devices or Seattle Children's devices whenever and wherever you are without having to log into the remote desktop portal (Citrix). You can also share files and folders with your co-workers or others outside the organization, helping to avoid large email attachments.
4. **Microsoft SharePoint:** This tool allows you to securely share and manage files, content and data among a group for easy and secure collaboration. SharePoint is available through Citrix (remote desktop portal) and as a cloud-based app to avoid going through Citrix.
5. **Microsoft Stream:** Microsoft Stream is a video service where you can upload, view and share videos securely. This may include meetings, presentations, training sessions, forums and much more. Through the tool, you can easily share comments and tag specific times in the video as reference points.
6. **Microsoft Teams:** Microsoft Teams is a digital hub that brings conversations, meetings, files and apps together in one place. This cloud-based app is available without logging into Citrix.
7. **Webex:** This video conferencing solution offers an easy and intuitive interface for joining and contributing to meetings. For the best experience, visit [seattlechildrens.webex.com](http://seattlechildrens.webex.com) or download the Webex mobile app on your smartphone, tablet or home computer to connect to Webex with full audio and video.

# How-to Guide: DocuSign

DocuSign software costs are covered by individual departments. Please verify with leadership in your department if DocuSign is approved for your use.

DocuSign is an approved application at Seattle Children's for signing most documents electronically:

## Approved for signing:

- a. Affiliation agreements and program letter of agreements
- b. Budget-related documentation
- c. Certificates of medical necessity
- d. Credentialing documentation
- e. Donor forms (i.e. pledge forms, endowment agreements, etc.)
- f. Durable medical equipment orders
- g. Electronic consents (eConsents) (except research eConsents as part of a FDA and Part 11 regulated study)
- h. Financial invoices, reports, cost transfers and internal forms
- i. FMLA (Family and Medical Leave Act) forms
- j. Funding agreements
- k. Immunization records
- l. Lab requisitions
- m. Legal agreements, contracts and quotes
- n. Medical supplies and device orders
- o. Paratransit forms
- p. Prior authorizations
- q. Project charters and proposals
- r. Release of information requests
- s. School forms
- t. Standard operating procedure (SOP), operational-level agreements (OLA) and service-level agreements (SLA)
- u. Vendor contracts and related documentation

## Not approved for signing:

- a. Prescriptions for controlled substances (Learn more about the clinical apps available for the [electronic prescribing of controlled substances.](#))
- b. Research electronic consents that are part of a FDA and Part 11 regulated study.

DocuSign supports a variety of file types. Once a document is uploaded to DocuSign, it becomes a secure PDF and cannot be modified.



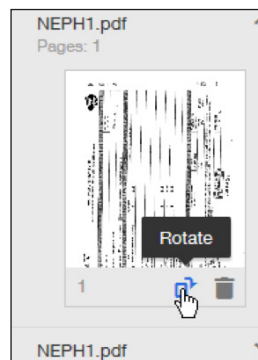
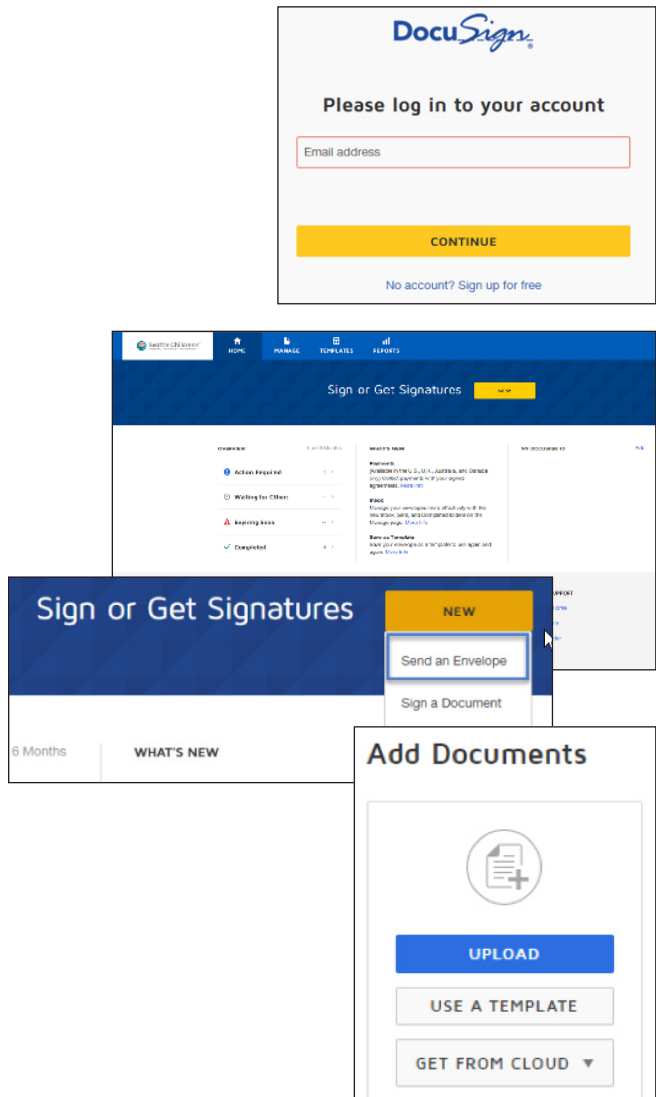
## How to Begin Using DocuSign

You must request access to DocuSign by submitting a ServiceNow request in order to send a document. (*Please note:* You do not have to request access in order to receive or sign a document.)

1. Submit the [ServiceNow form](#) to request DocuSign access (can also search “DocuSign Access Requests” on the ServiceNow site to find the form). *Please note:* You will be asked to log into Seattle Children’s network to access the ServiceNow site.
    - a. Once you complete the request form, it will be routed to the account owner for approval.
    - b. Once approved, you will be added to DocuSign and receive an email notification.
  2. To access DocuSign (once you receive the approval email), visit [seattlechildrens.okta.com](https://seattlechildrens.okta.com) and click on the DocuSign app. (You can also log into DocuSign by visiting DocuSign.com.)
  3. Enter your Seattle Children’s email address and click “Continue.”
- From the home screen after logging in, you can:

### Send documents for signature:

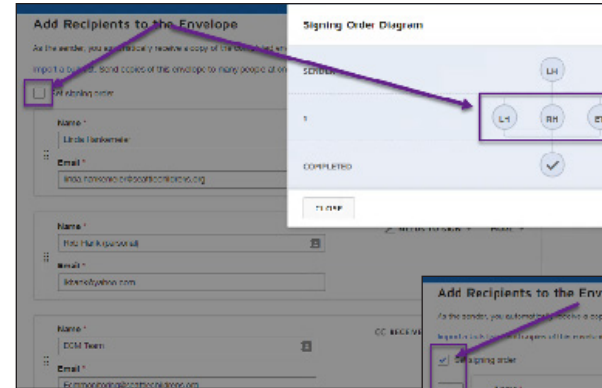
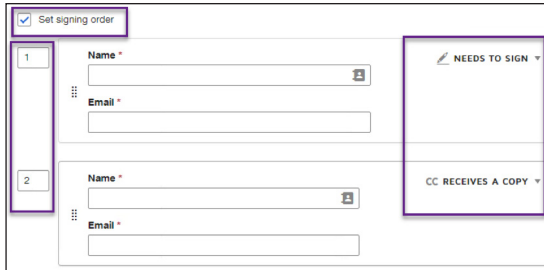
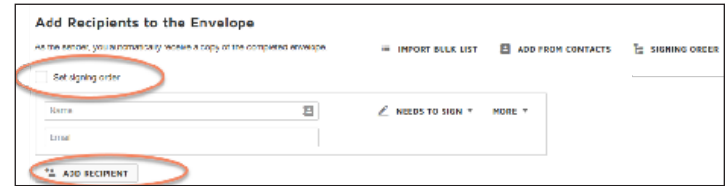
1. Before sending documents for review and signature, it is recommended that you send a separate email letting the recipients know that you will be sending documents by DocuSign so they are comfortable clicking the links.
2. Click the “New” button in the top banner that reads: “Sign or Get Signatures.”
3. Select “Send an Envelope” in the drop-down menu.
4. Click “Upload a file” to upload a document from your computer or click “Get from Cloud” to upload a document from an online location.
5. Locate the document you want to upload and click “Open.”
6. If you need to rotate a document after upload, click on the rotate icon on the far right at the bottom of the image that you choose to upload.



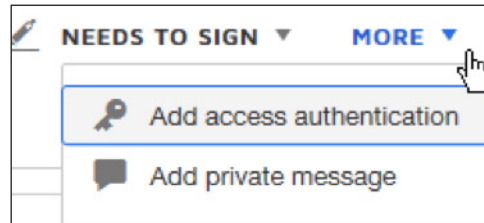
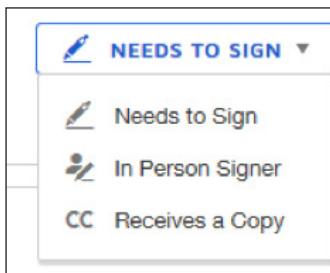
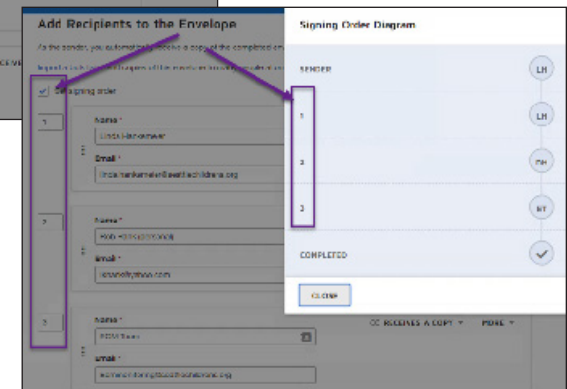


7. In the “Add Recipients to the Envelope” section:

- a. Enter the name and email address of each recipient.
- b. Check the “Set signing order” box if you are sending to multiple signers and need a specific order of their signatures. If you do not check this box, the documents will be sent at the same time for signing.
- c. When choosing recipients, you can choose from three options in a drop-down menu on the right side: “Needs to Sign,” “In Person Signer” or “Receives a Copy.”



- d. Under the “More” drop-down menu on the right side:
  - i. You can choose “Add access authentication,” which will create a code that is included in the email notification to the recipient that they must use when accessing the message.
  - ii. You can also “Add private message” to send a message that only the specific recipient will receive.
- e. Click on the “Add Recipient” button. You can add additional recipients.





**Message to All Recipients**

**Email Subject\***  
Please DocuSign: \_Sample1.pdf  
Characters remaining: 71

**Email Message**  
Enter Message  
Characters remaining: 10000

**Advanced Options | Edit**

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Senders can use either quick send or advanced edit

**Recipient Privileges**

Allow recipients to sign on paper

Allow recipients to change signing responsibility

**Reminders**

Send automatic reminders

Number of days before sending first reminder: 0

Number of days between reminders: 0

**Expiration**

Number of days before request expires: 120

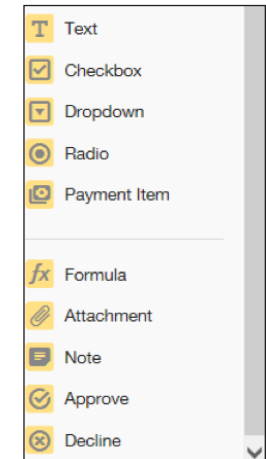
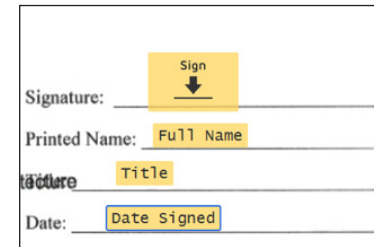
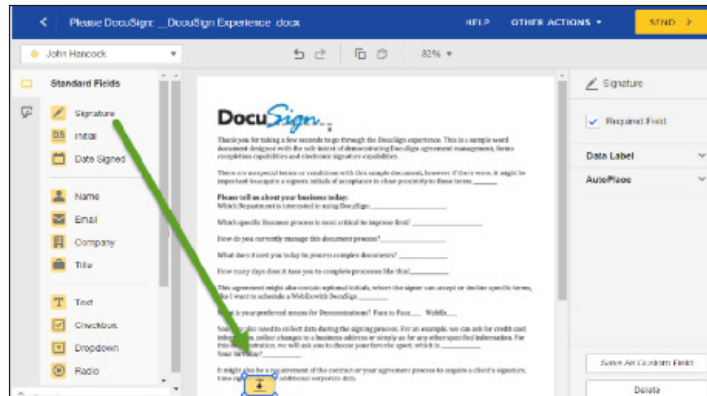
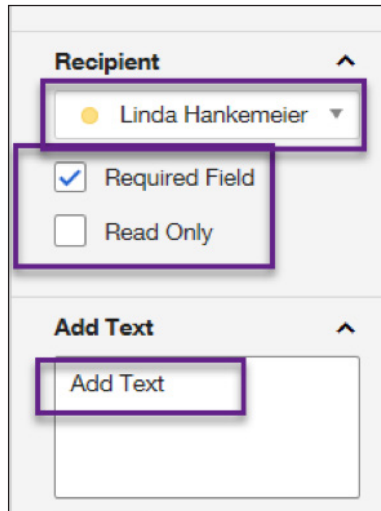
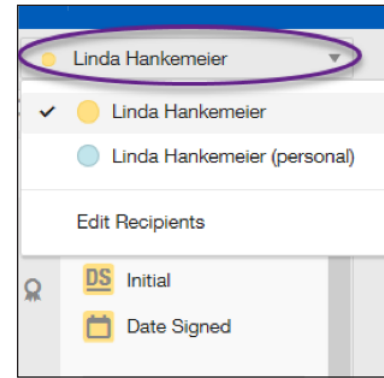
Request will be scheduled for expiration on 12/19/2019 | 11:59:59 PM

Number of days in which to warn signers before expiration: 0

8. DocuSign automatically adds an email subject when you upload a document. You can edit the subject and add a message when you see the “Message to All Recipients” prompt.
9. Also on the “Message to All Recipients” page, you can choose the “Advanced Options” drop-down menu to:
  - a. Choose “Recipient Privileges” to either allow recipients to sign on paper or allow recipients to change signing responsibility. (Uncheck the “Allow recipients to change signing responsibility” if you do not want them to be able to forward to another person for signing.)
  - b. Set “Reminders” by checking the “Send automatic reminders” box and entering the number of days before sending the first reminder and the number of days between reminders.
  - c. Enter the number of days before the request expires and number of days to warn signers before the request expires. (The default setting is 120 days.)
10. Click “Next.”

11. You are now ready to add signing fields. The recipient's name will be displayed in the recipient list. Verify that the name in the top box is the signer. (*Please note:* If you have multiple signers, you will need to ensure each signer is listed in the drop-down menu. Click on each signer separately to place signature boxes in the document. You will notice different color boxes for each signer.)

- a. Find where in the document you would like to have fields added.
- b. Click and drag a field from the "Standard Fields" palette and place it in the document.
  - i. Fields include: signature, initials, date signed, name, email, company, title and other options. (*Please note:* Full name, title and date signed fields automatically update from the sender's information in DocuSign.)
  - ii. You can add a text box in the document and choose whether it is a required field or read only. If you add a text box for the second recipient, the first recipient will not see the box on the form.



12. Preview your document then click "Send."

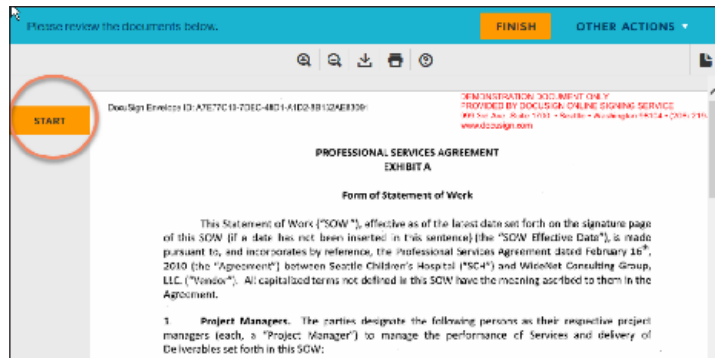




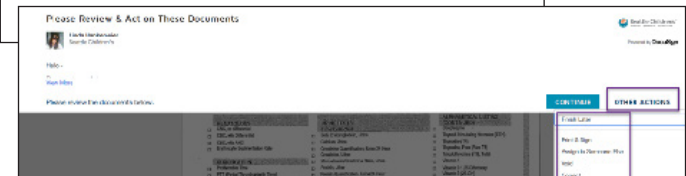
## To sign documents:

*Please note:* You do not need to have a DocuSign account to sign documents.

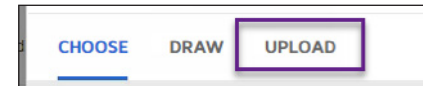
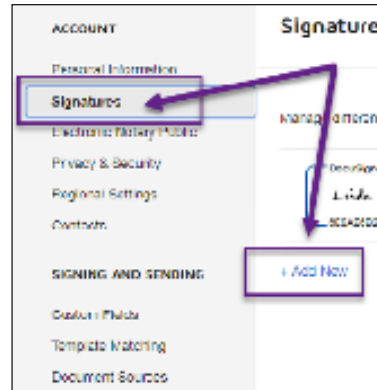
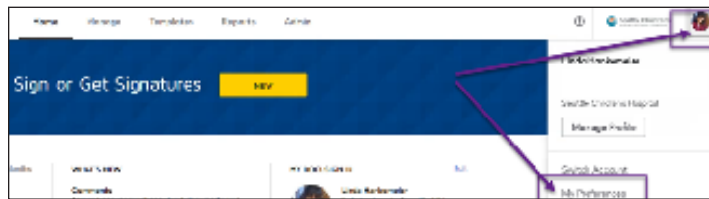
1. Click on the “Review Document” link in the email you receive from DocuSign.
2. Depending on the settings set by the sender, users may be able to assign the document to another user to sign. Recipients can also choose to “finish later,” “print and sign” “void” or “correct.” Make these choices in the drop-down menu under “Other Actions.”
3. Click “Start” and the document will move to the signature line. You can use the scroll bar on the right to scroll through and read the document.



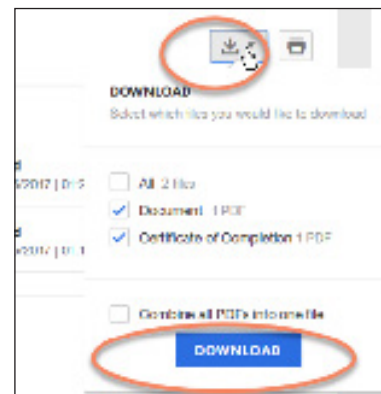
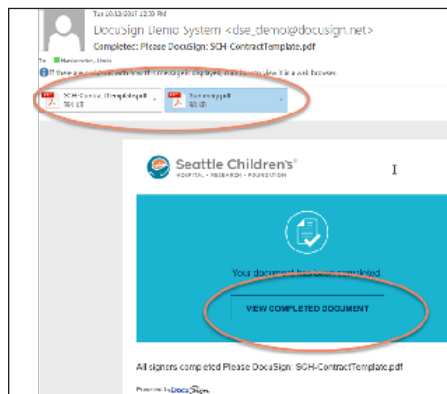
4. Fill in the required information in the signature line. (*Please note:* Some information may autofill like name and title if you have already been into DocuSign previously.)



5. Click on the “Sign” indicator on the document to sign.
  - a. New signers will need to fill in information in the “Adopt Your Signature” prompt. ▶
  - b. You can also upload custom signatures to include credentials. *(Please note: You must be added to Seattle Children’s Okta account or log into DocuSign for application access to upload custom signatures. You do not, however, need to have a DocuSign account to sign documents.)*
    - i. To upload a signature, click on the icon in the far right corner of the main DocuSign page and select “My Preferences.”
    - ii. Select “Signatures.”
    - iii. Click “Add New.”
    - iv. Click “Upload.”
    - v. You need to upload signatures and initials then click “Create” to save to DocuSign.



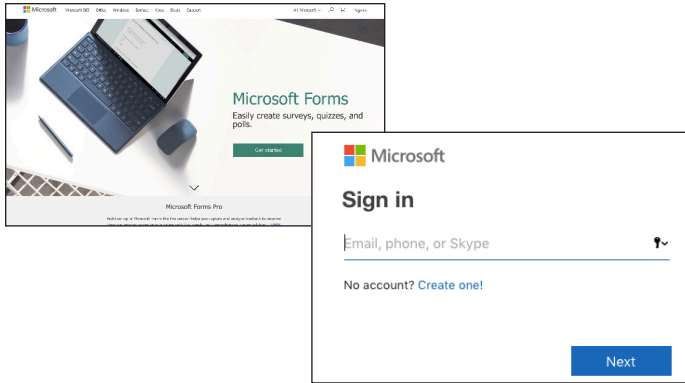
Senders will receive an email with a copy of the fully executed document and the summary of the signing. Senders can also click on “View Completed Document” in the email or by clicking “Download” from the “Overview” section when logged into DocuSign.



To learn how to set up templates in DocuSign, please view the [DocuSign how-to guide on CHILD](#).



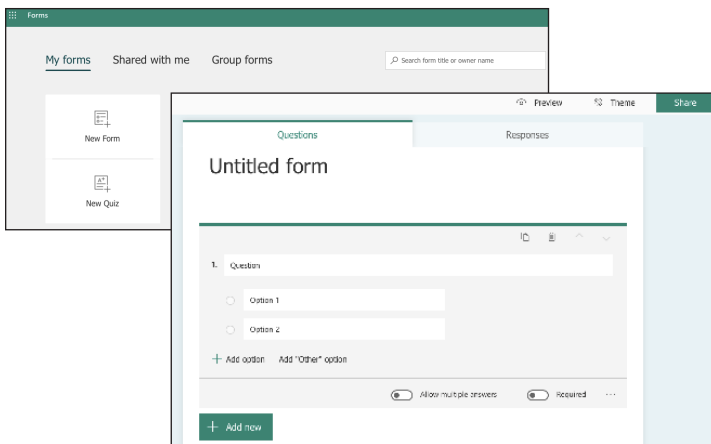
# How-to Guide: Microsoft Forms



Microsoft Forms allows you to quickly and easily create custom quizzes, surveys, questionnaires, registrations and more. When you create a quiz or form, you can invite others to respond to it using any web browser (including on mobile devices). As results are submitted, you can use built-in analytics to evaluate responses. Data can be easily exported to Microsoft Excel for additional analysis.

## Accessing Microsoft Forms

1. Open a browser and visit <https://office.com> or <https://forms.office.com>.
2. Click “Get Started” or choose “Log in” in the upper right-hand corner of the website.
3. Enter your Seattle Children’s email address.
4. You can now:
  - a. Create a new form or quiz and access any of your forms already created.
  - b. Access the forms shared by others.
  - c. Access forms shared by your groups.



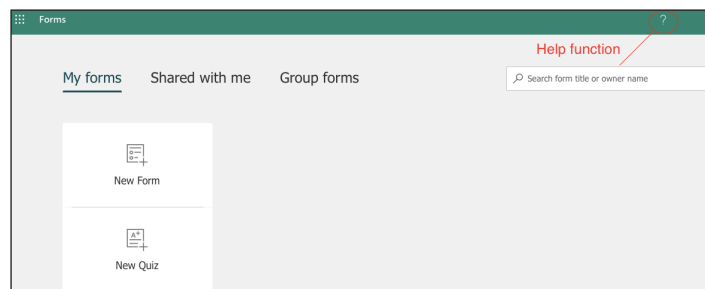
## Using Microsoft Forms

Check out these links for information on using Microsoft Forms:

- [Forms Help & Learning](#)
- [Forms Basics \(video\)](#)

## For Help With Microsoft Forms

- Select the “?” in the upper right corner of the Forms screen to see the available help topics and training.



# How-to Guide: Microsoft OneDrive

The cloud-based Microsoft OneDrive for Business app allows you to access, edit and share your files on your personal devices or a Seattle Children's device whenever and wherever you are without having to log into the remote desktop portal (Citrix). You can also share files and folders with your co-workers or people outside the organization, helping to avoid large email attachments. The app is fully compliant with HIPAA standards and available to all Seattle Children's employees.

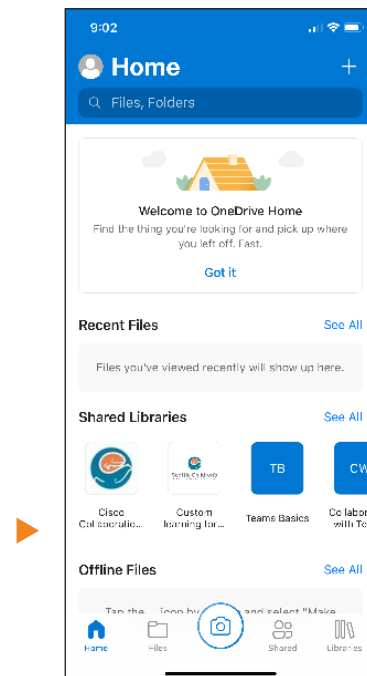
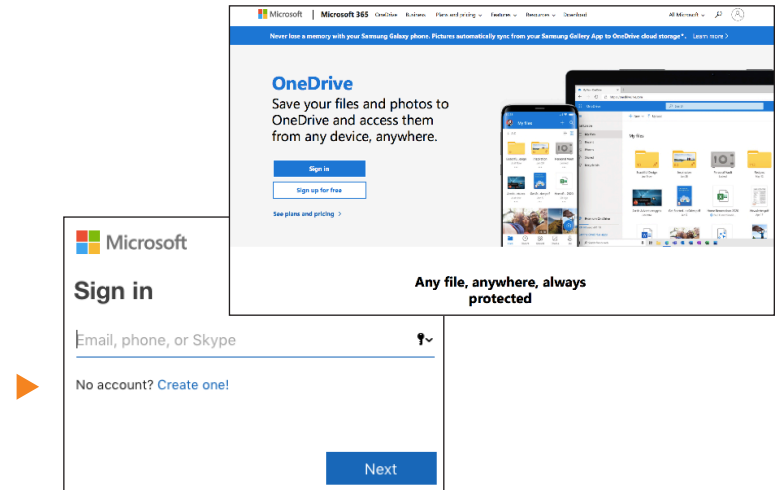
## Accessing Microsoft OneDrive

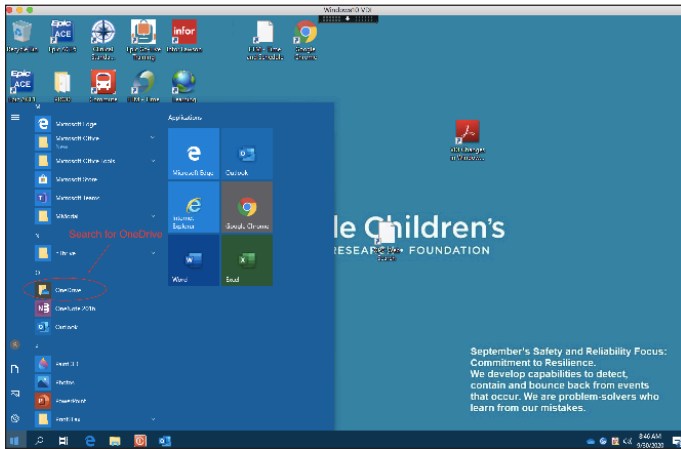
### Microsoft OneDrive on the Microsoft Site

1. Visit [www.office.com](http://www.office.com) or <https://onedrive.live.com>.
2. Click the "Sign in" button.
3. Log in using your Seattle Children's email address. (*Please note:* All Seattle Children's employees and many consultants/contractors are already licensed to use OneDrive.)
4. You may be directed to Seattle Children's Okta site to enter your username (Seattle Children's email address) and network password. (*Please note:* If you do not have a Seattle Children's email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
5. Click "Sign In."
6. You will be routed back to the Microsoft site to begin using Microsoft OneDrive.

### Microsoft OneDrive's Mobile App

1. Visit the app store on your smartphone or tablet and search "Microsoft OneDrive."
2. Install the "Microsoft OneDrive" app.
3. Enter your Seattle Children's email address and click the arrow to sign in.
4. You may be directed to Seattle Children's Okta site to enter your username (Seattle Children's email address) and network password.
5. Click "Sign In."
6. You are now ready to use the Microsoft OneDrive app.



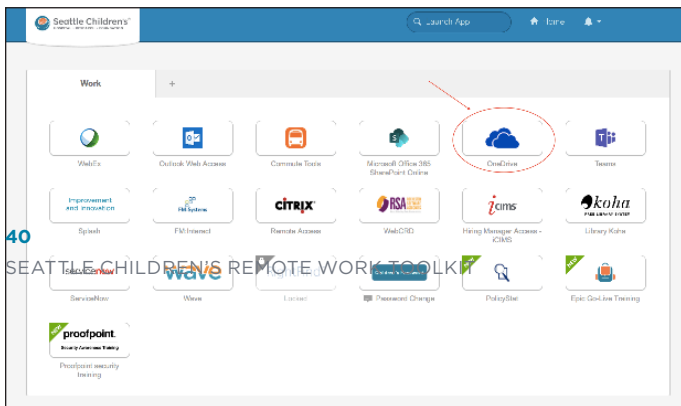


## Microsoft OneDrive Through the Remote Desktop Portal

1. Visit [remoteaccess.seattlechildrens.org](https://remoteaccess.seattlechildrens.org).
2. Click on the Windows 10 VDI icon under the “Desktops” tab.
3. Click on the start button in the lower left-hand corner and search “OneDrive.”
4. Choose “Open” to launch OneDrive.
5. Your OneDrive account will show when you open up a new window to access files. You can now add files to your OneDrive from the Seattle Children’s network. These files will then be available through the mobile app or by visiting [www.office.com](https://www.office.com) or <https://onedrive.live.com>.

## Microsoft OneDrive on Okta Site (Outside the Remote Desktop Portal)

1. Visit [seattlechildrens.okta.com](https://seattlechildrens.okta.com).
2. Log in using your username (Seattle Children’s email address) and network password. (*Please note:* If you do not have a Seattle Children’s email address, enter your user ID: *UserID@seattlechildrens.org*. *This is not an email address.*)
3. Click “Sign in.”
4. You may be directed to confirm your account through Okta Verify on your mobile device.
5. Click on the OneDrive app.
6. Choose your account (if auto-populated) or add a new account. If you add a new account, enter your Seattle Children’s email address and click “Next.”
7. You are ready to begin using Microsoft OneDrive.



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## Using Microsoft OneDrive

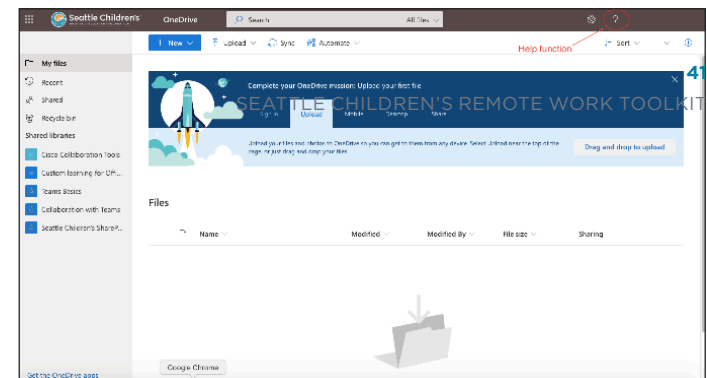
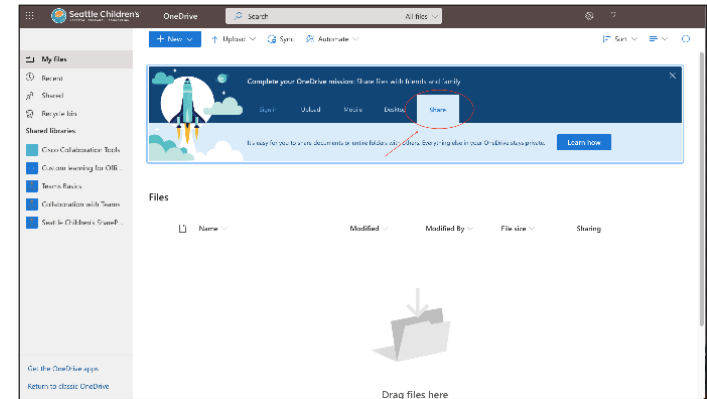
### How to Share a File or Folder

1. When you have a file open, choose “Share” in the upper right corner of the ribbon. Or, select your file or folder (without opening them) and click on the “Share” tab.
2. If you are working on your desktop and the file has not been saved to OneDrive or SharePoint, select a location where you want to upload the file. OneDrive is connected to each user’s account and can be accessed from the “Save As” menu. If you’re not at a desktop computer, you can use the mobile app or any browser.
3. Select the down arrow to choose permissions for the link you will be sharing. These options include:
  - a. People in your organization
  - b. Specific people
4. Select “Apply” to save the permissions.
5. Enter the email address(es) of the person(people) you want to share the file or folder with.
6. Type a message.
7. Select “Send.” Or, you can select “Copy Link” and send the link in an email or add it to a file.

[Learn more about using Microsoft OneDrive](#) or view our [3, 2, OneDrive!](#) video.

### For Help With Microsoft OneDrive

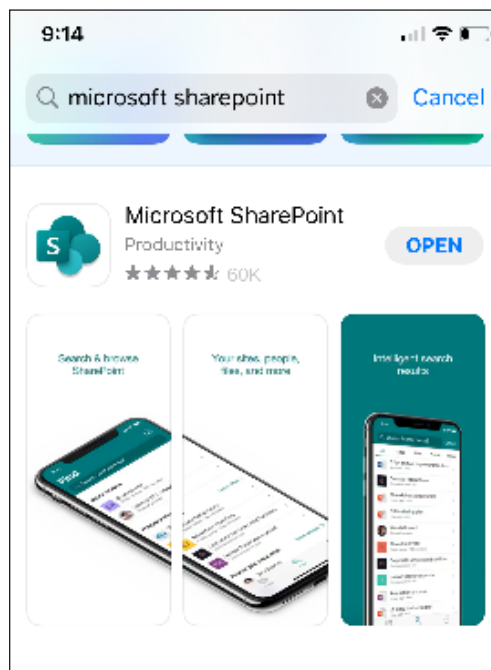
Select the “?” in the upper right corner of the OneDrive screen to see the available help topics and training.





# How-to Guide: Microsoft SharePoint

Microsoft SharePoint allows you to securely share and manage files, content and data among a group for easy and secure collaboration. SharePoint is available through Citrix (remote desktop portal) and as a cloud-based app to avoid going through Citrix.



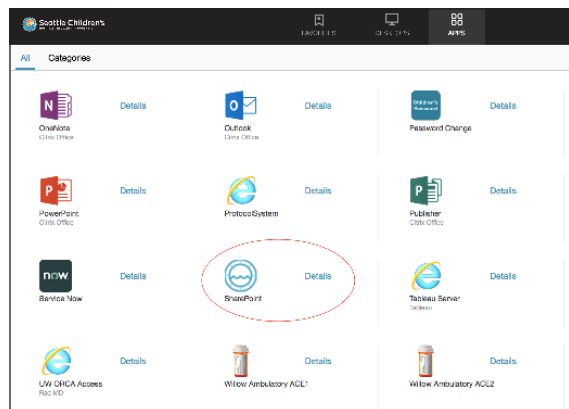
## Accessing Microsoft SharePoint

### Microsoft SharePoint Mobile App

1. Visit the app store on your smartphone or tablet and search "Microsoft SharePoint."
2. Install the "Microsoft SharePoint" app.
3. Enter your Seattle Children's email address and click the arrow to sign in.
4. You may be directed to Seattle Children's Okta site to enter your username (Seattle Children's email address) and network password. (*Please note:* If you do not have a Seattle Children's email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
5. Click "Sign In."
6. You are now ready to use the Microsoft SharePoint app.

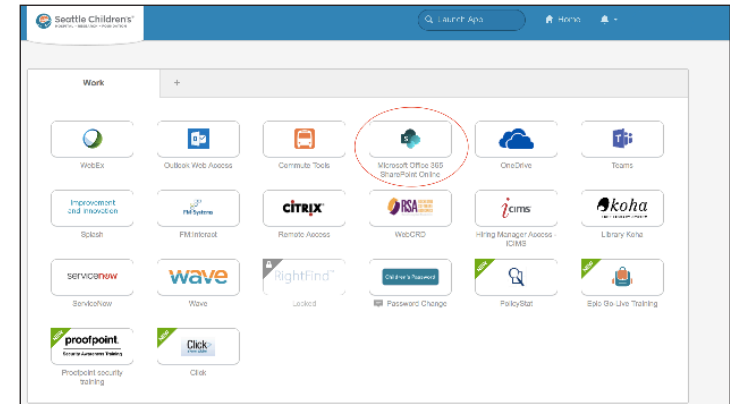
### Microsoft SharePoint Through the Remote Desktop Portal

1. Visit [remoteaccess.seattlechildrens.org](https://remoteaccess.seattlechildrens.org).
2. Click on the Windows 10 VDI icon under the "Desktops" tab.
3. Click on the start button in the lower left-hand corner and search "SharePoint."
4. Choose "Open" to launch SharePoint.



## Microsoft SharePoint on Okta Site (Outside the Remote Desktop Portal)

1. Visit [seattlechildrens.okta.com](https://seattlechildrens.okta.com).
2. Log in using your username (Seattle Children's email address) and network password. (*Please note:* If you do not have a Seattle Children's email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
3. Click "Sign in."
4. You may be directed to confirm your account through Okta Verify on your mobile device.
5. Click on the SharePoint app.
6. Choose your account (if auto-populated) or add a new account. If you add a new account, enter your Seattle Children's email address and click "Next."
7. You are ready to begin using Microsoft SharePoint.



## Microsoft SharePoint on the Microsoft Site

1. Visit <https://seattlechildrens.sharepoint.com>.
2. Click the "Sign in" button.
3. Log in using your Seattle Children's email address. (*Please note:* All Seattle Children's employees and many consultants/contractors are already licensed to use SharePoint.)
4. You may be directed to Seattle Children's Okta site to enter your username (Seattle Children's email address) and network password. (*Please note:* If you do not have a Seattle Children's email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
5. Click "Sign In."
6. You will be routed back to the Microsoft site to begin using Microsoft SharePoint.

## Using Microsoft SharePoint

To request a new SharePoint site, open a [ServiceNow ticket](#). You can also request help with designing/deploying a SharePoint Online site from ServiceNow. (*Please note:* You will be asked to log into Seattle Children's network to access the ServiceNow site.)

[Learn more about how to use SharePoint.](#)

## For Help With Microsoft SharePoint

Select the "?" in the upper right corner of the SharePoint screen to see the available help topics and training.



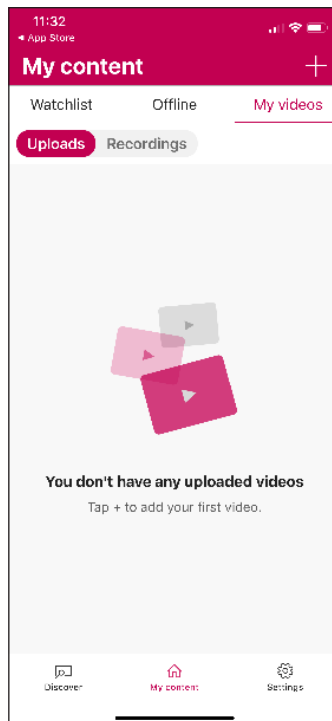
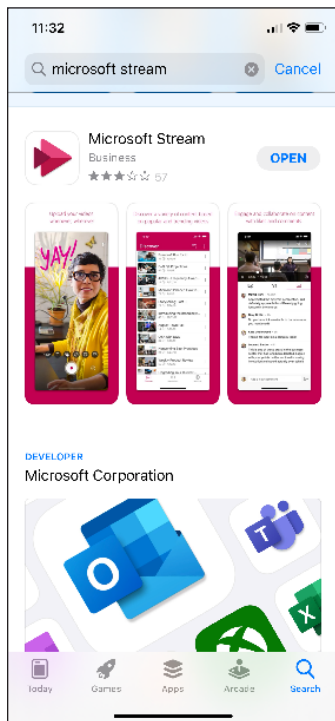
# How-to Guide: Microsoft Stream

Microsoft Stream is a video service where you can upload, view and share videos securely. This may include meetings, presentations, training sessions, forums and much more. Through the tool, you can easily share comments and tag specific times in the video as reference points.

## Accessing Microsoft Stream

### Microsoft Stream on the Microsoft Site

1. Visit <https://web.microsoftstream.com>.
2. Click the “Sign in” button.
3. Log in using your Seattle Children’s email address. (*Please note:* All Seattle Children’s employees and many consultants/contractors are already licensed to use Stream.)
4. You may be directed to Seattle Children’s Okta site to enter your username (Seattle Children’s email address) and network password. (*Please note:* If you do not have a Seattle Children’s email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
5. Click “Sign In.”
6. You will be routed back to the Microsoft site to begin using Microsoft Stream.



### Microsoft Stream Mobile App

1. Visit the app store on your smartphone or tablet and search “Microsoft Stream.”
2. Install and open the “Microsoft Stream” app.
3. Enter your Seattle Children’s email address and click the “Sign in” button.
4. You may be directed to Seattle Children’s Okta site to enter your username (Seattle Children’s email address) and network password. (*Please note:* If you do not have a Seattle Children’s email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
5. Click “Sign In.”
6. You are now ready to use the Microsoft Stream app.

## Using Microsoft Stream

### For Help With Microsoft Stream

Select the “?” in the upper right corner of the Stream screen (or under “Settings” in the mobile app) to see the available help topics and training.

# How-to Guide: Microsoft Teams

Microsoft Teams is a digital hub that brings conversations, meetings, files and apps together in one place. The program is available through Citrix's remote desktop portal and through a cloud-based app available without logging into Citrix.

## Accessing Microsoft Teams

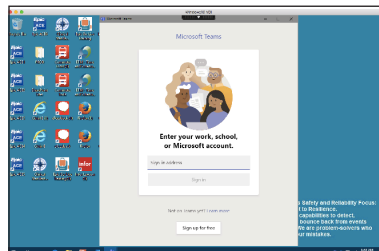
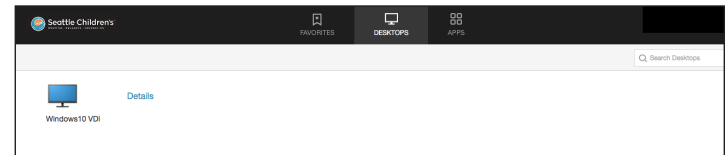
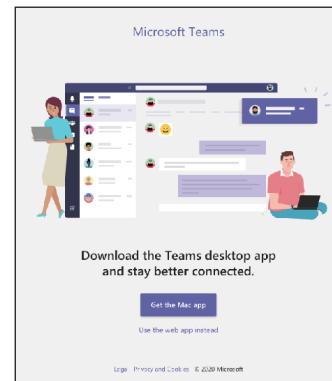
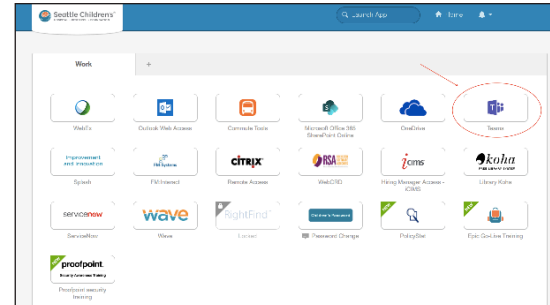
### Microsoft Teams Through the App

1. Visit [seattlechildrens.okta.com](http://seattlechildrens.okta.com) and select the “Teams” tile.
2. Enter your Seattle Children’s email address.
3. You will then have the option to download the app on your computer (PC or Mac) or open Microsoft Teams with the web app.
4. You will be asked to enter your credentials to authenticate in Okta.
5. Once you are set up, launch the Teams app and you will be connected to all of your assigned Teams (if you are already part of a Team). You can use the app to chat with a person or communicate to an entire team at once. You can also share documents and collaborate within Teams.

You can also access by downloading the “Microsoft Teams” app in the app store on your smartphone or tablet; installing and opening the app; and entering your Seattle Children’s email address to sign in. You may be asked to enter your credentials to authenticate in Okta.

### Microsoft Teams Through the Remote Desktop Portal

1. Log on to [remoteaccess.seattlechildrens.org](http://remoteaccess.seattlechildrens.org).
2. Open Windows 10 VDI in the “Desktops” tab.
3. Click on the Microsoft start menu and search for the Microsoft Teams application.
4. Enter your Seattle Children’s email address and click “Sign in” to begin.





## Microsoft Teams on the Microsoft Site

1. Visit <https://teams.microsoft.com>.
2. Click the “Sign in” button.
3. Log in using your Seattle Children’s email address. (*Please note:* All Seattle Children’s employees and many consultants/contractors are already licensed to use Microsoft Teams.)
4. You may be directed to Seattle Children’s Okta site to enter your username (Seattle Children’s email address) and network password. (*Please note:* If you do not have a Seattle Children’s email address, enter your user ID: `UserID@seattlechildrens.org`. *This is not an email address.*)
5. Click “Sign in.”
6. You will be routed back to the Microsoft site to begin using Microsoft Teams.

## Using Microsoft Teams

### Starting a new Microsoft Team

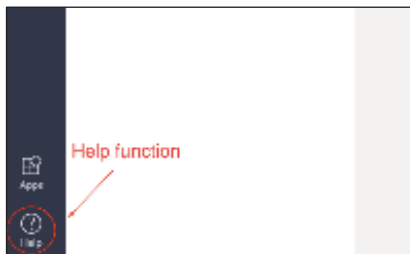
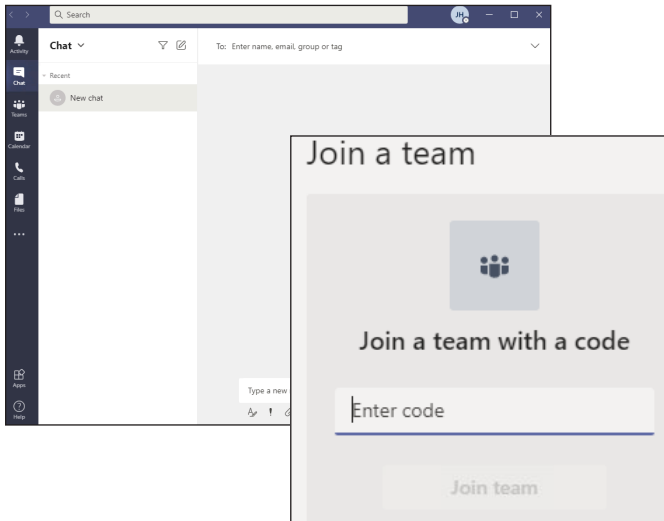
1. Submit a [ServiceNow request](#) (click “Service Catalog” then choose “Productivity & Collaboration” and choose “I Need a New Team Site” in ServiceNow) and include the name of the Team and the name or names of the owner(s) of the Team. (*Please note:* You will be asked to log into Seattle Children’s network to access the ServiceNow site.)
  - a. *Please note:* The owner has full control to manage the Team, including adding and removing members. (Review the “Go-to guide for team owners” in the training section on Teams for more information.)

◀ Learn more about Microsoft Teams by visiting the links below:

- [Collaboration with Teams \(video\)](#)
- [Downloading and Installing the Teams Desktop App](#)
- [Meetings in Teams](#)
- [Teams Basics \(video\)](#)
- [What is Microsoft Teams? \(video\)](#)

◀ **For Help With Microsoft Teams**

Select the “?” on the Teams screen to see the available help topics and training.



# How-to Guide: Webex

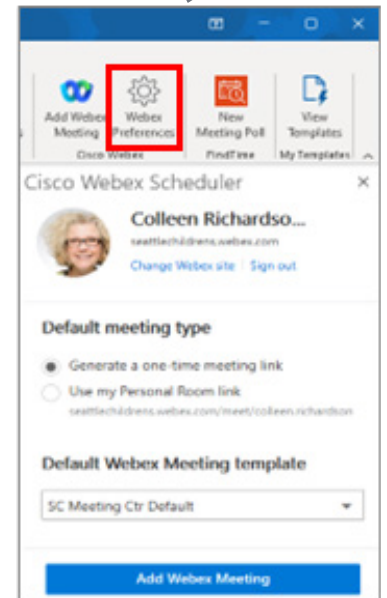
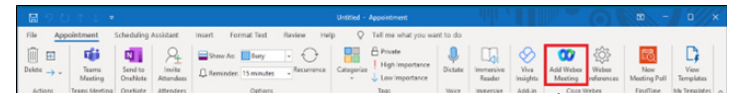
Webex is a video conferencing solution that offers an easy and intuitive interface for joining and contributing to meetings.

Webex allows you to quickly and easily host or participate in a virtual meeting or conference call. During the meeting, you can video conference (computer camera or video teleconferencing capability required), share presentations or your desktop, make annotations, type chat messages or just have a multi-line call.

## Scheduling Meetings in Webex

### Scheduling a Webex Meeting Through Outlook

1. To schedule a regular Webex meeting, open an Outlook meeting invite and select the "Add Webex Meeting" tile.
2. To schedule a meeting with your Personal Room, first select the "Webex Preferences" tile and change "Default meeting type" to "Use my Personal Room link," then click "Add Webex Meeting."
3. For both meeting types, details are added immediately.
4. A link to join the meeting appears in the Location field of the invite.
5. A meeting room can be added and will also appear in the Location field.
6. Add participants and details, then click "Send."





## Scheduling Meetings for Others

You can schedule a meeting for someone else if that person has given you permission by making you a delegate to **BOTH** their Webex account and their Outlook calendar:

- **Assigning a Webex Delegate** (*Please note:* This must be done by the person giving permission.)
  - Browse to [seattlechildrens.webex.com](https://seattlechildrens.webex.com).
  - Choose “Login” or “Sign in” in the upper right corner.
  - Choose “Preferences” then “Scheduling Options.”
  - In the “Scheduling Permissions” field, enter the email address of the person you want to schedule meetings on your behalf.
- **Assigning an Outlook Delegate** (*Please note:* This must be done by the person giving permission.)
  - From your Outlook Calendar, choose the “File” tab.
  - Click on the “Account Settings” icon and choose “Delegate Access.”
  - From the Delegates window, click “Add.” Find the person you want to give access to and click “OK.”
  - At the Delegates Permissions window, click “OK” and “OK” again at the next window.

To schedule on behalf of the person that has assigned you as a delegate in both Webex and Outlook:

- Open the calendar of the person you are scheduling for.
- Create a meeting from their calendar.
- Click “Add Webex Meeting” or “Personal Room” from the Outlook ribbon.
- Invite your attendees, fill out your subject and/or agenda and click “Send.”





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