



DukeHealth



TECHNOLOGY TOOLKIT

March 2021

At Duke Health Technology Solutions, we want to help you leverage technology to work smarter, safer, and more efficiently. The purpose of this toolkit is to educate Duke Health team members on what technology is currently available and to share best practices for taking advantage of these tools and resources. Please note the following:

- **We have linked text to webpages whenever possible.** While this publication can be printed, we suggest keeping an electronic version handy so that you can take advantage of its interactive qualities.
- This publication will periodically be updated. The **date of this toolkit's most recent edit** can be found on the cover.
- Both a **Table of Contents** and an **Index** are included for reference.
- This toolkit has been created to serve as more of an **overview** than an exhaustive list of step-by-step instructions. Please take advantage of the many resources included in this toolkit for more detailed information and **request assistance** when needed.
- Because this toolkit is being written during the time of the COVID-19 pandemic, **special attention has been paid to technologies that can make working remotely a seamless process.**

Together, we can leverage innovation to deliver tomorrow's health care today. **For questions, concerns and requests, please reach out to [Duke Health Service Desk](#), which is available 24/7.**



24/7
CUSTOMER SUPPORT

Visit DHTS.DUKE.EDU or call 919-684-2243

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Workstation Setup

Getting started with Mac

Select topic for instructional video.



get set up at home



connect a monitor



using a second monitor



connect to WiFi

Getting started with Windows

Select topic for instructional video.



PC fundamentals



get set up at home



connect a monitor



using a second monitor



connect to WiFi

Caring for your computer

- [Cleaning Your Computer](#)
- [10 Ways You're Using Your Computer Wrong](#)
- [10 Tips for Basic Computer Maintenance & Security](#)



Resources:

[How to set up a wired network](#)



Ergonomic Tips

The **Duke Occupational & Environmental Safety Office (OESO)** provides employees with support relating to workstation ergonomics.

- **Tips for Setting Up Your Home Computer**
- **Computer Ergonomics**
- **Computer Workstation Standards**
- **Ergonomic Resources**

Internet Connection

Employees working from home are responsible for providing their own high speed internet service. An internet connection is necessary for access to email as well as applications, files and sites on the Duke Health network. Internet service providers vary by location and employees can search for providers via **highspeedinternet.com/nc**. Duke Health does not endorse any internet service provider. If possible, use a wired connection. When using WiFi, stay within close proximity of the access point or router (or use a wireless extender).



Resources

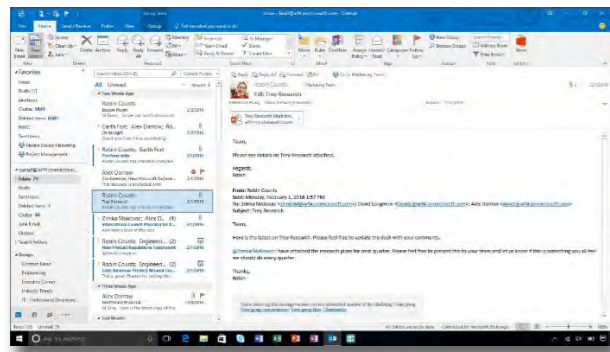
- **Internet Basics**
- **Troubleshoot Your Internet Connection**
- **Test your internet speed**
- **Manage & resolve bandwidth problems**

Email & Calendars

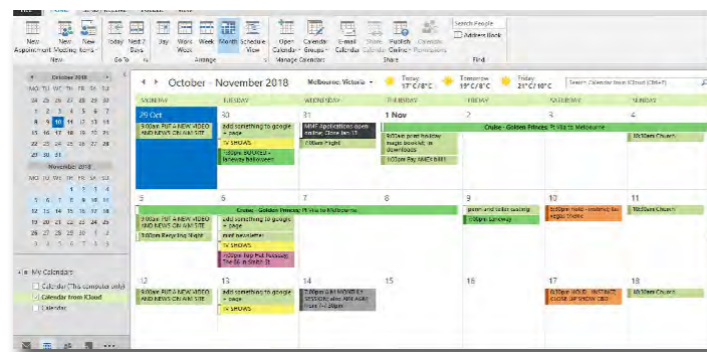
Applications for the management of email and calendars are important productivity tools. At Duke Health, there are three approved applications that allow users to access email and calendars: computers, mobile devices and via the Web.

Computers

Every Duke-owned computer has the **Microsoft Outlook** application to manage email, calendars, contacts and tasks.



Outlook email on a computer



Outlook calendar view on a computer

Mobile Devices

Duke Health allows access to employee email accounts on mobile devices using the **Workspace One** application and enrolling in **Duke Health Mobile Device Manager (MDM)**.

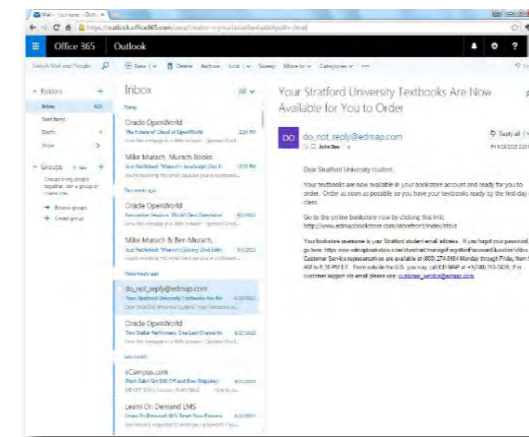


Visit the [Duke Health Mobile Device Manager \(MDM\) website](#) for instructions on how to add the Airwatch Agent application to a mobile device and enroll the device in MDM.

Internet (Web-based)

Duke Health email accounts can be accessed on the Web from any computer or mobile device with an internet connection using **Duke Office 365**. Office 365 provides the same functionality as the Outlook app on a computer, including email, calendar, contacts and tasks.

Visit the [Duke Office365 webpage](#) and sign-in by selecting "Access Office 365 Email".



Office 365 web email

Outlook for Windows

Select topic for instructional video.



inbox overview



create & send email



organize your inbox



manage calendar



use contacts & tasks

Outlook for Mac

Select topic for instructional video.



inbox overview



create & send email



organize your inbox



manage calendar



use contacts & tasks

Productivity Tools

Employees can download and install **Microsoft Office** applications for Duke-owned and personal-owned computers and access via the Web for free. Microsoft Office is a suite of applications and services for the Microsoft Windows and Mac OS X operating systems. It includes products such as Word, Excel, and PowerPoint.

Computers

Licenses for Microsoft Office are available on the [Duke Software Licensing website](#).

- **Duke-Owned Computers:**
Choose Microsoft Office 2016 for Windows (Duke-Owned Computers)
- **Personal-Owned Computers:**
Choose Microsoft Office 2016 for Windows (Personal Devices)

Internet (Web-based)

Office365 provides access via an internet web browser to email, calendar, **Microsoft Teams**, online versions of Word, PowerPoint, Excel, and much more. [Visit the Duke Office365 web-page](#) and sign-in by selecting "Access Office 365 Email".

Clinical & Administrative Applications

Many of Duke Health's critical applications cannot be accessed when not connected to the Duke Health secure network. The recommended method to access applications when not on-site is to use **Citrix**.

How do I access Citrix?

1. Visit citrix.duke.edu and login using a Duke NetID and password.
2. First-time users must install the **Citrix Receiver** ([Installation Instructions](#)).

What is Citrix?

Citrix is a remote access tool that allows employees to securely access resources on the Duke Health Network without the need of being at a Duke site. All activity occurs within the Duke Data Center and Citrix provides a virtual window that maintains the security of Duke data and resources.



Citrix Requirements

- ✓ A valid Duke-issued **NetID** (called a User name in Citrix) and password.
- ✓ A high-speed Internet connection (wired or wireless).
- ✓ Duke **Multi-Factor Authentication** (MFA) enabled.

What applications are available?

Applications available on Citrix include:

- **Maestro Care**
- **Virtual PIN***
- **Safety Reporting**
- **DUHS COVID19 Tracking Dashboard**
- **SAP**
- **OnBase**
- **Pharmacy**
- **Provation**
- **Systemex**
- **Duke Paging Web**

* a remote desktop that allows you to run clinical applications and access your shared drives



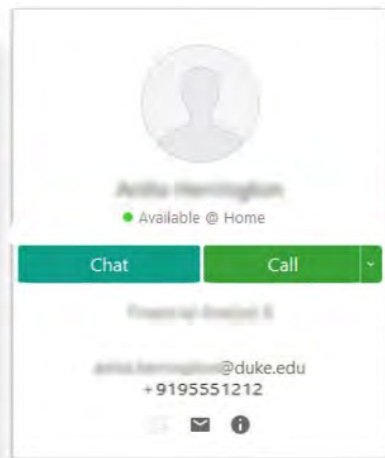
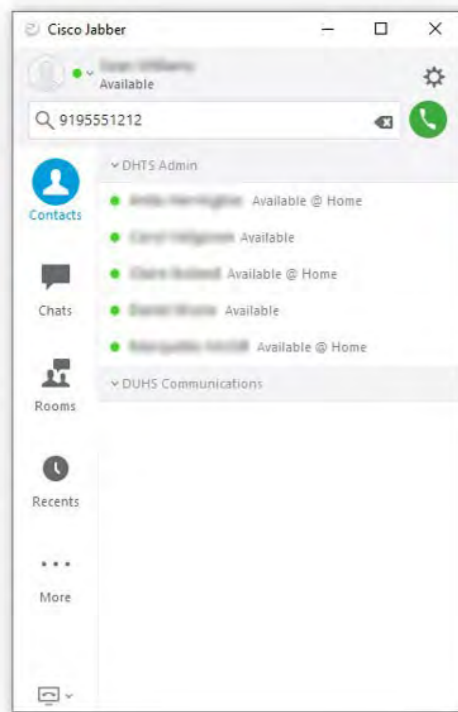
Quick Start Guide:

[Quick Start Guide for Duke Health Virtual Desktop \(VDI\)](#)

Phone Calls

Cisco Jabber

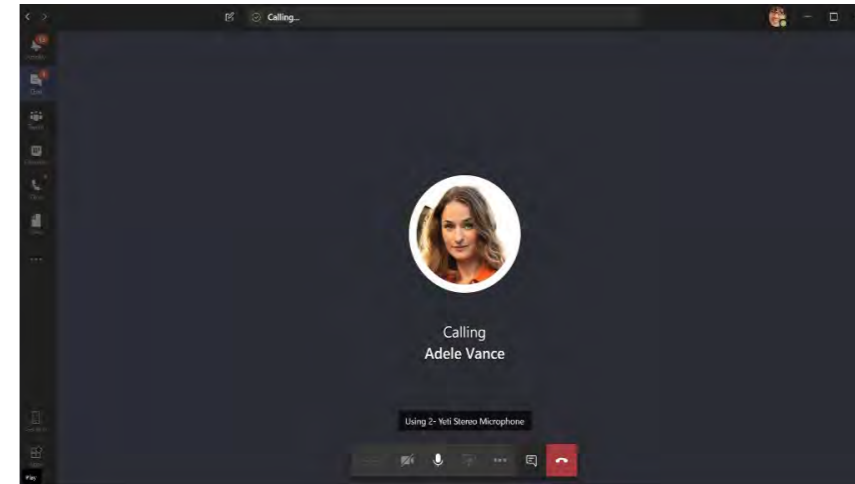
The **Cisco Jabber** application enables Duke employees to call one another using a computer or mobile device. The application is connected to the Duke directory to make it easy to find the right people, see whether and how they're available, and collaborate more effectively.



Resources

- [Download Cisco Jabber](#)
- [Jabber Guide for Mac](#)
- [Jabber Guide for Windows](#)
- [Jabber Guide for iPhone/iPad](#)
- [Jabber Guide for Android](#)

To make a call through Jabber, click on the name of a contact and then select "call."



Microsoft Teams

Microsoft Teams is a team collaboration application that is fully integrated with Microsoft Office 365 and helps teams work more quickly and efficiently. Microsoft Teams is available to all Duke Health employees via a computer or mobile device.

This application works best if only used for internal purposes and not for instant messaging or teleconferencing with users who are not Duke employees.

Resources

- [Get Started using Teams](#)
- [Get Help for Teams](#)
- [Explore all the available Teams across Duke](#)
- [Start Chats and Calls](#)
- [Pro Teams Hacks](#)
- [Teams Training Videos](#)

Video Meetings

Duke provides licenses to employees on several platforms for hosting and attending virtual meetings.



Zoom is ideal for video conferencing and meetings where face-to-face communication and presentations are necessary. Zoom Meetings provides video, voice, and screen sharing services so users can connect with colleagues across the campus or around the world. With Zoom Meetings, up to 300 participants can attend via phone, computer, mobile device, or video conferencing system.



Personal Health Information (PHI)

PHI may be shared in virtual meetings, but **can never be entered into the chat function**. Meetings that involve PHI can only be recorded directly to a Duke-owned, encrypted devices – never to the platform’s cloud or on personal-owned devices.

Resources

- [Getting Started on Zoom](#)
- [Zoom Meetings: Comprehensive Starting Guide](#)
- [Testing computer or device Audio](#)
- [Sign in and join a meeting](#)
- [Scheduling meetings](#)
- [Scheduling recurring meetings](#)
- [Video: Scheduling a meeting](#)
- [Recover a deleted meeting](#)
- [Assigning an alternative host](#)
- [Assigning scheduling privilege](#)
- [Zoom Help Center](#)
- [Zoom security and privacy](#)

Cisco WebEx

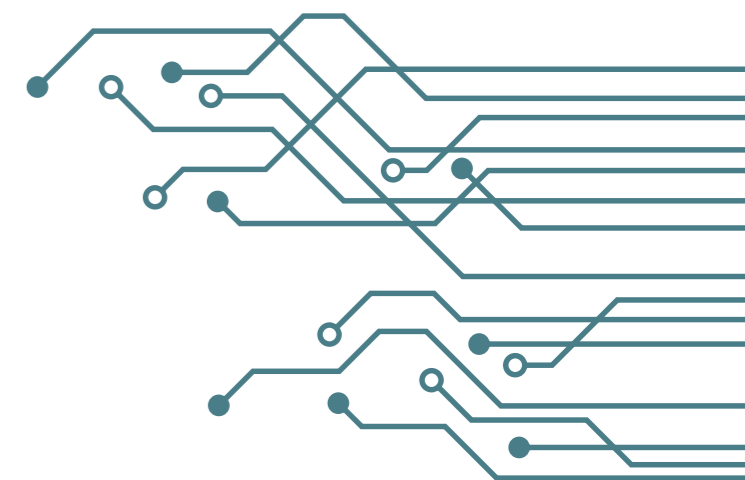
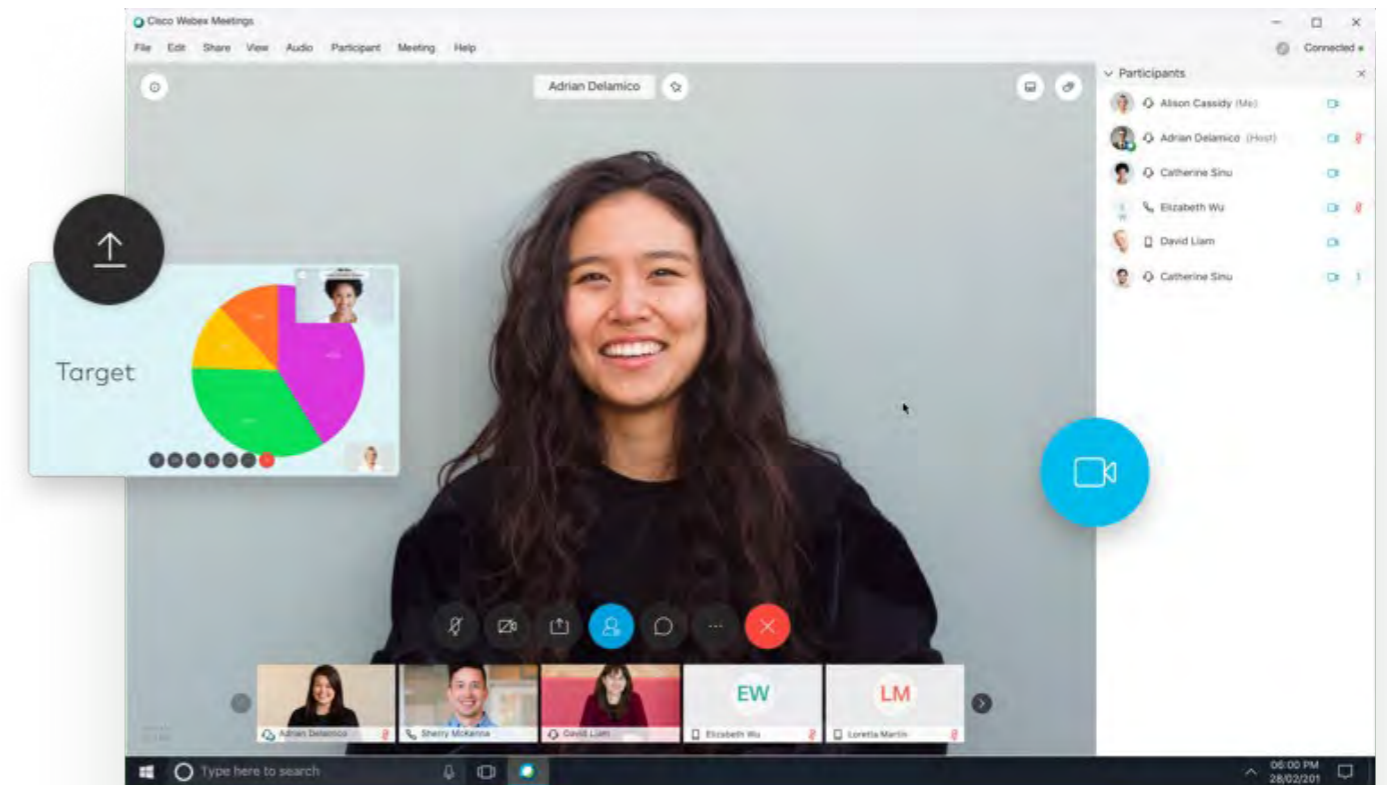
Employees may use the [Cisco WebEx](#) conferencing application. WebEx is a suite of online meeting tools that allow users to meet with participants inside and outside of Duke using a computer or mobile device. For most users, personal meeting rooms are the quickest and easiest way to connect. WebEx also offers specialized conferencing tools for specific situations.

WebEx Security

WebEx can be used by telecommuting Duke workforce members to show/discuss Protected Health Information (PHI). **Do not put PHI in the chat function of WebEx.** If users need to record a session that involves sharing of PHI, it must be done using “record to my computer” on a Duke owned and encrypted device, not on a personal device.

Resources

- [WebEx Guide and Instructions](#)
- [Getting Started: WebEx Meetings for Hosts](#)
- [Getting Started: WebEx Meetings for Attendees](#)
- [Using WebEx in Conference Rooms](#)
- [Best Practices for Working Remotely](#)





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Resources

- [Get Started using Teams](#)
- [Get Help for Teams](#)
- [Explore all the available Teams across Duke](#)
- [Pro Teams Hacks](#)
- [Video Meetings in Teams](#)
- [Setup and Start Live Events](#)
- [Teams Training Videos](#)

Faxing



opentext™ | RightFax™

RightFax allows users to send and receive faxes from anywhere, on any device. To access RightFax, visit citrix.duke.edu and login using a NetID and password. Once logged into **Citrix**, select the Google Chrome icon in the Citrix menu and enter this address: <https://rightfax-web.dhe.duke.edu>.

For detailed instructions on how to use RightFax, click on the boxes at right.



access & send a fax



receive faxes via email

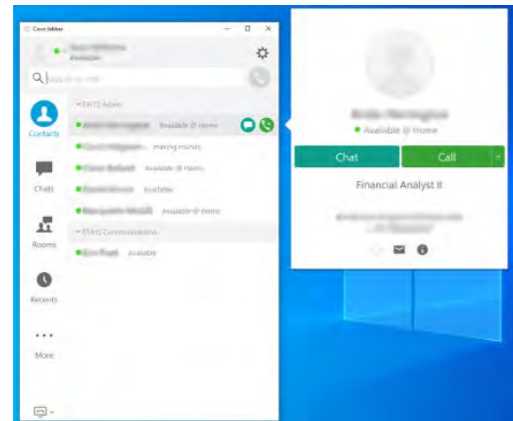


RightFax Training

Chat

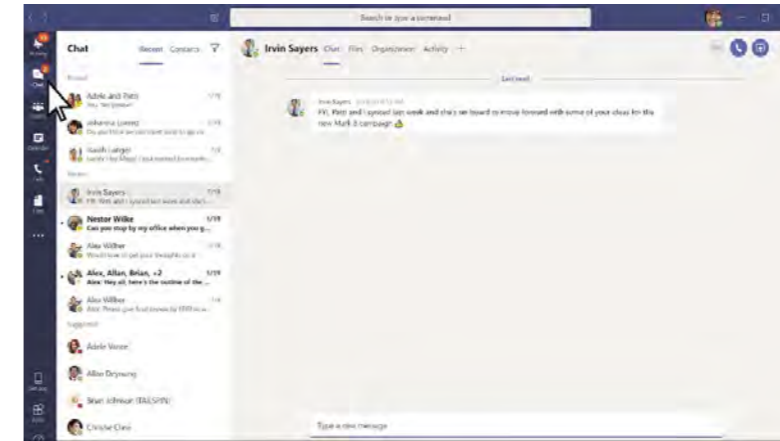


The **Cisco Jabber** application enables Duke employees to chat using a computer or mobile device. The application is connected to the Duke directory to make it easy to find the right people, see whether and how they're available, and collaborate more effectively.



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- [Jabber Guide for Mac](#)
- [Jabber Guide for Windows](#)
- [Jabber Guide for iPhone/iPad](#)
- [Jabber Guide for Android](#)
- [How to use the Chat feature](#)
- [Jabber FAQ](#)



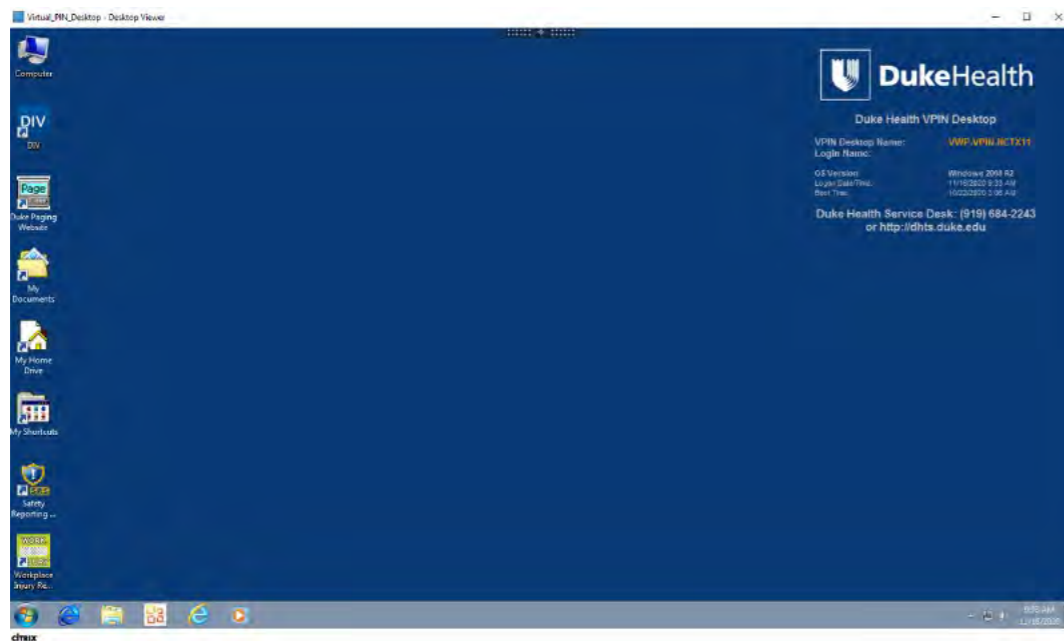
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Accessing Network Folders & Files

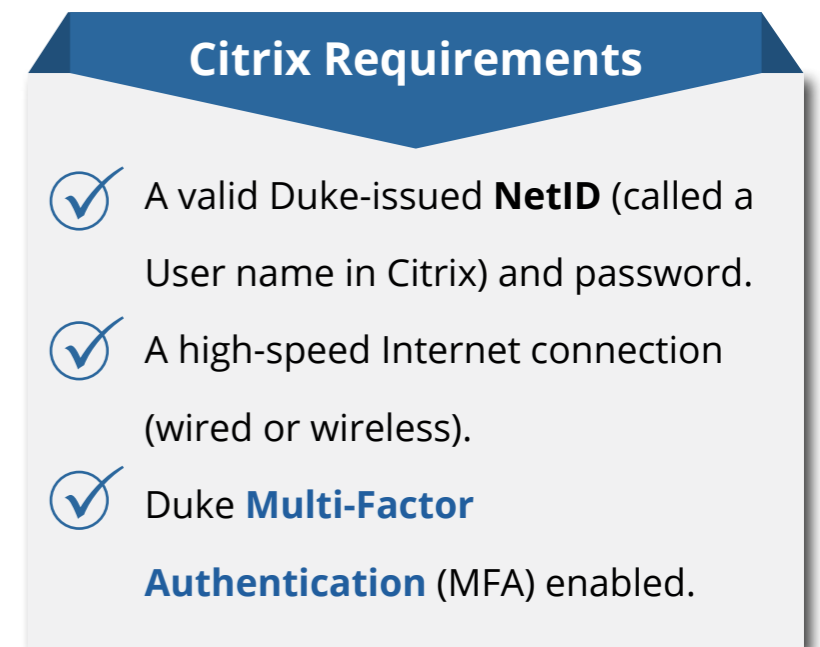
Employees working remotely may need to access personal and shared folders and files that are stored on the Duke Health network. There are two methods available to access network folders and files: **Citrix** (preferred and most secure method) and the **Virtual Private Network**.



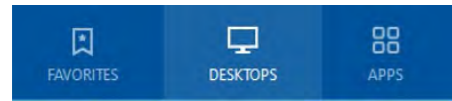
Citrix provides an easy-to-use **Virtual Desktop** application that allows employees to securely access resources on the Duke Health Network without the need of being at a Duke site.

How do I access Citrix?

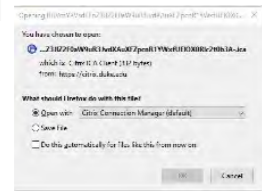
1. Visit citrix.duke.edu and login using a Duke NetID and password.
2. First-time users must install the **Citrix Receiver** ([Installation Instructions](#))



How do I access my personal and departmental files within Citrix?



1 Once logged into Citrix, select **Desktops** at the top of the page.



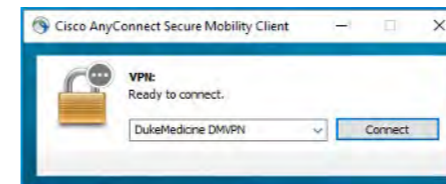
2 Select your Desktop. Some names will vary, but Virtual_PIN_Desktop is one example. Once Desktop is selected, select **OK** when the box appears.



3 The Virtual Desktop window will open and you can access your personal and shared folders and files by selecting the **Computer** icon and selecting the drive(s) where your folders and files are located.



Virtual Private Network (VPN)



What is VPN?

A **VPN** can simply be described as a method to provide secure access to a remote computer or network over the internet.

How do I setup the VPN to access the Duke Health network?

To request VPN access, visit the [Duke Health IT Portal](#). You must have a Duke NetID/password to login and request access. Next, select **Get IT** and then select **Account & Access**.



Quick Start Guide:

Requesting VPN Access for Duke University students and staff or Vendors/Contractors

You can now search for and select **Account Access Order Guide**. Under Basic Services, select **VPN Access - Remote Access**.

Complete all required fields, then select **Next** and then **Submit**.

How do I start using the VPN?

You must have **Cisco AnyConnect** on your computer. Need to download Cisco AnyConnect? Go to <https://vpn.duhs.duke.edu> and login using your **NetID** and password.



When the login screen appears, put your Net-ID in the box next to "Username". Next, enter your password in the box next to "Password" and put the word "push" in the box next to "Security Key". You will receive a notice through **DUO** to authenticate, similar to when you access other internal sites. It will then take you to a page where you can download and install Cisco AnyConnect.

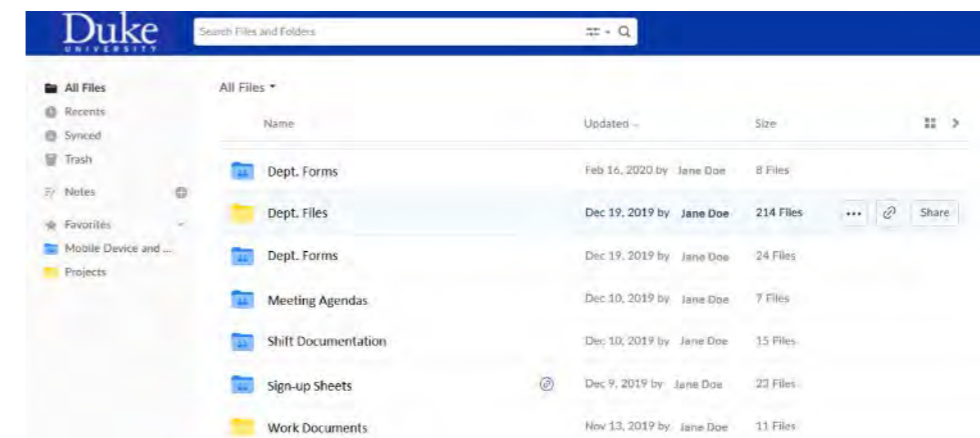
Once downloaded, choose Cisco AnyConnect on your computer and connect by following the same steps for Username, Password and Security Key as mentioned above.

Should I always stay connected to the VPN while working remotely?

No, you should only connect to the VPN while accessing sites and files, but disconnect as soon as you are done. The VPN can only accommodate a limited number of users at a time and being connected to the VPN during **WebEx, Zoom** or other virtual meeting platforms can interfere with the quality of your video and audio connections.

File Folders & Sharing

File storage and sharing services provide easy user access and secure collaboration with Duke and non-Duke users from any device. Employees working remotely should consider moving some frequently used files to one of these services instead of using **Citrix** or the **Virtual Private Network (VPN)** to access files stored on the Duke network.



Box is a cloud-based storage and collaboration service for all Duke Health employees. With Box, users can access, store and share content securely with Duke and non-Duke users — anywhere, anytime, on any device. Visit box.duke.edu to log in to Box.



getting started guide



5 skills to get started



about Duke Box

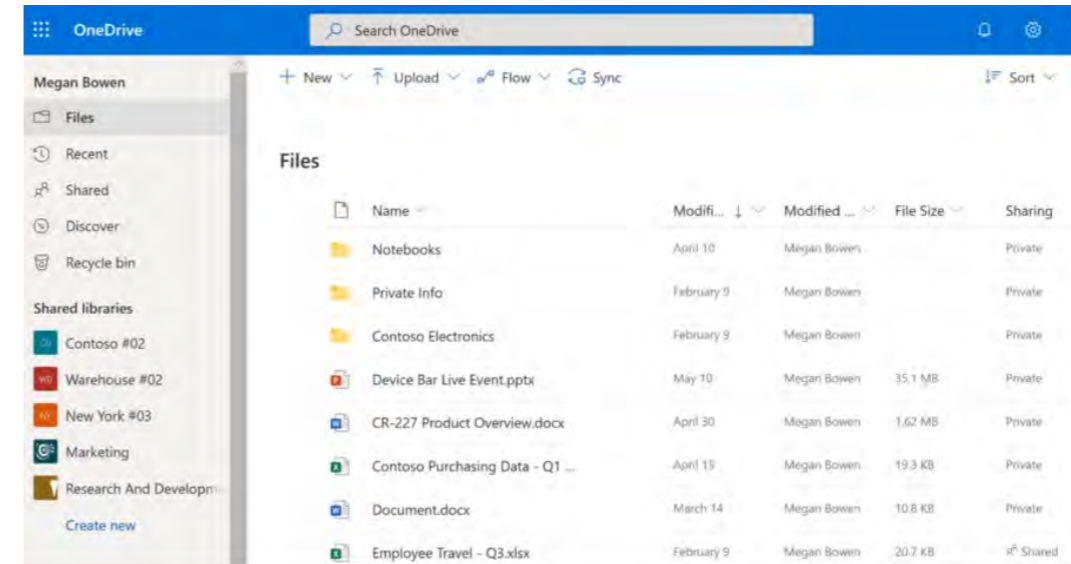


Resources:

[Security & Usage Practices for Duke's Box environment](#)

Box Security & Usage

- ✓ All Duke Health policies apply to the use of Duke Box accounts.
- ✗ Users can store and share many types of data in their Box account. However, there are restrictions on storing certain types of data.
- ✓ All Duke Health users are strongly encouraged to complete an online training module prior to account activation.
- ✗ Box is not for patient care. Please use **Maestro Care** instead.
- ✗ Box is not for backups, archives, and long-term storage. Please contact your department's IT staff for recommendations.



OneDrive

Microsoft OneDrive for Business allows Duke Health employees to store, sync, share files and collaborate with others at Duke online. It also is available via a mobile version of **Microsoft Office**, available free through Duke's site license with Microsoft, so users can edit, share and collaborate on documents using a mobile device or tablet.



upload files & folders



manage files & folders



collaborate



sync with windows



sync with mac

Ways to Access OneDrive

- ✓ Through a web browser
- ✓ Through the Windows App Store
- ✓ Using your iPad or iPhone
- ✓ Using your Android phone or tablet
- ✓ Mobile Device - Windows Phone



OneDrive Security

As with Duke Box, documents containing sensitive data may be inappropriate for OneDrive. Please follow [the same guidelines](#).

Electronic Signatures



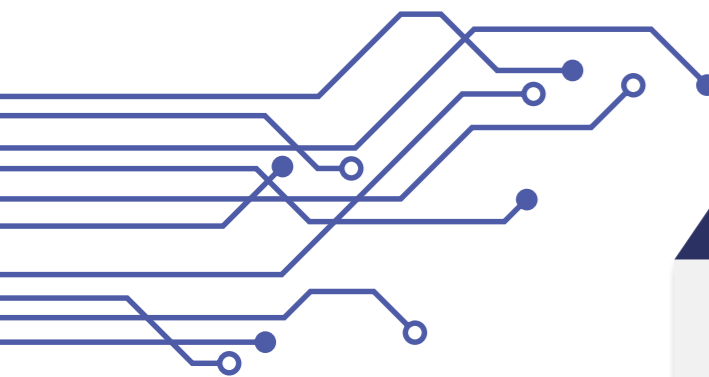
Adobe Sign

Adobe Sign is a cloud-based, enterprise electronic signature service that allows users to electronically sign documents and create custom workflows, replacing paper and ink signature with fully automated signature processes using a web browser. With it, users can easily send, sign, track, and manage their signature processes.

Due to many Duke Health employees working remotely, electronic signatures have been approved for use on some clinical and administrative forms. Using Adobe Sign, documents can be originated by an employee working remotely or on-site and sent to one or multiple colleagues to sign.

Clinical Use: Clinicians frequently need to sign forms that would normally be printed and signed in the clinic. These would be documents that cannot be electronically signed in **Maestro Care** and include forms sent to external providers, disability forms, DMV forms, and FMLA forms. Clinic staff can put these forms in Adobe Sign and clinicians can sign each electronically.

Administrative Use: Adobe Sign is also approved for use for forms used in administrative services. Examples include HR documents, Capital Project Request Forms, and more.



Inappropriate use of Adobe Sign

- ❌ With **Protected Health Information (PHI)** or other data of an extremely sensitive nature
- ❌ With PCI/Credit card information/financial account numbers
- ❌ With forms containing social security numbers
- ❌ When a user does not have appropriate signing authority
- ❌ For approvals and signatures related to legally binding contracts or agreements between Duke university and external parties unless authorized to do so


Usage restrictions and best practices

- Adobe Sign at Duke should only be used using Duke credentials. Users should not sign/author anything for Duke with a personal Adobe Sign account purchased directly from the vendor or otherwise obtained outside of the Enterprise Agreement.
- Users should ensure that departments are willing to participate in e-signature for multi-departmental documents.
- Individual users and departments should follow the same document storage procedures/guidelines already in place within their individual departments for signed paper documents. We recommend using the current Duke-approved storage methods for the storage of forms and signed documents (Adobe Sign, **Box**, departmental drives etc.) already in place.
- Document retention policies should remain the same and it would be the department's responsibility to retain electronic copies like paper.
- Duke IT Security Office recommends the use of **VPN** while using Adobe Sign from an off-Campus location.


Submit Request to use Adobe Sign

All Duke Health employee access to Adobe Sign must be approved and activated by DHTS Web Services.

[Click here to begin](#)



getting started guide



creating online forms



PDF digital signatures



Adobe Sign & Word

Security

The Duke IT Security Office provides many resources for employees to maintain necessary security of devices and applications. Visit security.duke.edu for more information.



Duke Computers

Employees should use a Duke Health issued computer to conduct all work-related business. These computers have the necessary security and encryption to safeguard all Duke-owned sensitive information. Never allow non-employees to use a computer owned by Duke Health; this includes employee's household members and family.



Personal Computers

If an employee does not have a Duke Health issued computer and must use a personal device, it is never permitted to store Duke sensitive information, even temporarily, on personal devices. All employees are governed by and should regularly review the Duke Confidentiality Agreement. Ensure that personal computers are configured to automatically update operating system, browsers, and all software/plugins.



Configuring personal computers

Windows

1. Go to the Start button, then Settings-Update & Security-> Windows Update.
2. Choose "Check for Updates" if you want to check the updates manually.
3. Next, select Advanced Options, and then under "Choose how updates are installed", select Automatic (recommended).

Mac

1. On your Mac, choose Apple menu > System Preferences, then click Software Update.
2. To automatically install macOS updates, select "Automatically keep my Mac up to date."
3. To set advanced update options, click Advanced, then do any of the following:
 - o Check for updates automatically
 - o Download updates without asking
 - o Install macOS updates automatically
 - o Install app updates from the App Store automatically
 - o Install system files and security updates automatically
4. Click ok

[Click here for detailed instructions](#)

WiFi Security

Duke Health IT recommends connecting only to secure Wi-Fi networks when accessing Duke resources. Secure networks that are password protected and not available to the general public.



Home Network Do's

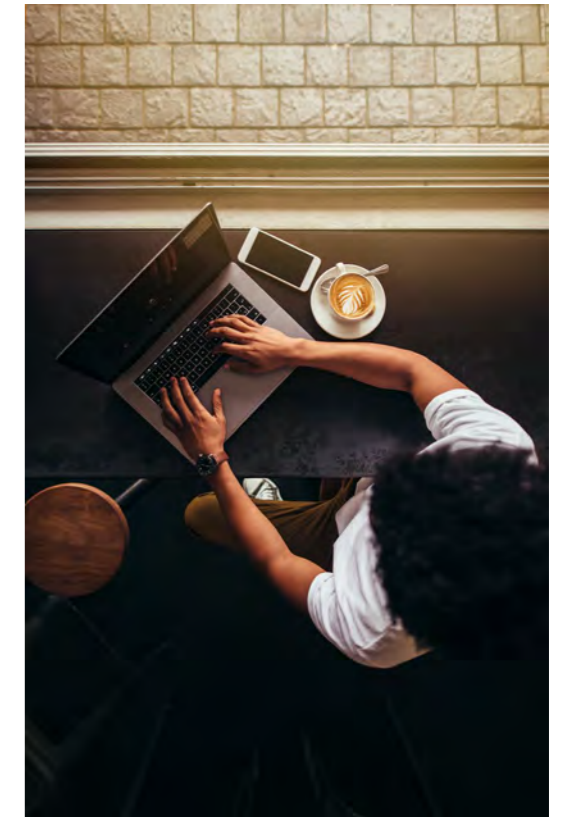
- ✓ Use the latest firmware available
- ✓ Set your own **strong password**
- ✓ Only share your home WiFi password to those that you trust and change as needed
- ✓ Set WiFi **SSID** (the name you will see when you connect to it) to something you will recognize
- ✓ Turn on router encryption, preferably WPA2
- ✓ Engage support from your internet provider or a 3rd party IT service if you are unfamiliar with router and network configuration

Home Network Don'ts

- ✗ Do not use the password that was initially assigned to your WiFi router
- ✗ Never share your password, which allows you to reset your router configurations.
- ✗ Don't set WiFi SSID (the name you will see when you connect to it) to your family name

WiFi Public Network

Public Wi-Fi networks, such as those provided at local businesses for customers, should not be used to conduct Duke Health business. If you cannot use secure home WiFi, consider using a personal hotspot if available on your mobile phone. If you must use a public network, connect to the Duke Health VPN to ensure your traffic is secure.




Email and Electronic Communications

Duke uses **Microsoft Outlook** email as our preferred email provider. Be extremely careful opening email attachments, clicking on email links or entering information into email fields.




Resources:

[Updated Guidance For IT Security - October 2020](#)



Microsoft Outlook Do's

- ✓ Use the **Report Phish To Duke** button to report any suspicious emails
- ✓ Access non-Duke email from non-Duke computer/device whenever possible
- ✓ Encrypt sensitive emails (including those containing **SEI** sent outside of Duke Health) using **Outlook Send Secure**.
- ✓ Use Duke's **Box** (see above) cloud-based file sharing solution over email when possible.



Microsoft Outlook Don't's

- ✗ Do NOT use email for sharing documents containing **PHI**.
- ✗ Duke Health email containing PHI or SEI may not be forwarded to a non-Duke Health email account.

Resources:

[Secure System Usage Memo](#)

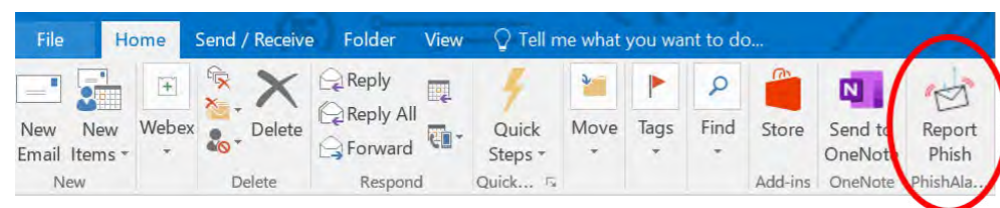


Duke Health approved email systems

Only use a Duke Health approved email system for Duke Health communications. Currently approved email systems include the Duke Health **Exchange** server and Duke's **Microsoft Office 365** email solution. Personal email accounts through services such as Gmail, Yahoo, and Hotmail, or external sites that aggregate email accounts, may not be used to conduct Duke Health business.

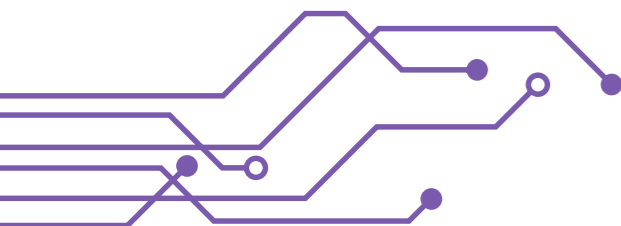
PhishAlarm

PhishAlarm is a button that will appear at the top of all Outlook email clients (Windows, Mac, Web, Android, and iOS) and can be used instead of submitting a n incident ticket or emailing the ISO. It is part of the **Proofpoint service** already in use at Duke for protecting email accounts against malicious links and attachments.



How to use PhishAlarm

1. The icon will be visible in the Outlook email toolbar. If you suspect that an email is a scam or potentially harmful, open the email and click on the PhishAlarm button in the toolbar.
2. A copy of the email (including email header and content) will be sent to the ISO for review.
3. After the email is analyzed, you will receive notification of whether it was harmful or not and, if harmful, the message will be quarantined.



LastPass...

Duke offers the premium version of the **LastPass** password manager service free to all faculty, staff and students. To get started with LastPass, **create a Free LastPass account** using a personal email account, then **upgrade a free LastPass account to a premium account**.

Helpful features

- Set up a master password
- Import saved passwords in your browser
- **Automatically log out** when all browsers are closed or idle
- **Enable Mobile Recovery**
- Run **LastPass' Security Challenge** to identify which websites and passwords should be changed
- Create **one-time passwords** for public computers
- Autofill from LastPass to mobile apps (available for **Android** and **iOS**)
- **Set up emergency access** for your account.
- Share passwords with other Last Pass users (i.e. family members)



Quick Start Guides:

Getting started
LastPass for Android
LastPass for iOS

LastPass Enterprise

If your department needs to share Duke-related account information, LastPass Enterprise is available for that purpose. To find out more about setting up LastPass Enterprise, email security@duke.edu.



Antivirus Software for Personal (non-Duke) Computers

In an effort to help protect faculty, staff and students working from home, Duke has partnered with **CrowdStrike** to pilot **Falcon Prevent** for Home Use, a next-generation anti-virus solution designed to protect personal computers against malware, ransomware, and other cyber threats. Duke is offering the anti-virus software free for personal computers for a limited time and on a voluntary basis.

How it works

Falcon Prevent for Home Use is designed to work alongside your existing antivirus solution (such as **Windows Defender Antivirus**, etc.). The software can be installed on multiple machines in a household. The Falcon software agent runs silently with no user interface or icons. If a threat is encountered, it will display a brief notification message explaining actions taken (such as a block or quarantine of a malicious action or file).



Privacy

With your privacy in mind, Falcon Prevent for Home Use is designed to only share information related to cyber attacks against machines on which it is installed. When a threat is detected, alerts related to the threat are uploaded to CrowdStrike. Duke's Security Offices have access to the alert information, so that they can respond to questions from users about alerts on their machines. **No other information, including user activity, is shared.**

Submit Request to use CrowdStrike

To begin using CrowdStrike Falcon Prevent for Home Use, register for the software here:





[Click here to begin](#)

If you have any issues with the installation process, or if the agent blocks something that you believe is not malicious, please contact the [OIT Service Desk](#).

Technical Support

Duke Health IT Service Portal

The **Duke Health IT Service Portal** has many resources to support employees' IT needs. Click on any of the boxes below for support.

 Learn IT Browse and Search for Articles	 Get IT Browse the Service Catalog
 Fix IT Report Something is Broken	 My IT View your Incidents and Requests




Resources

- **Service Request Catalog: Request Computers, Workstations and Hardware**
- **Report a Lost or Stolen Device**



Duke Health Service Desk

The **Duke Health Service Desk** is available 24/7 to assist employees with technical questions and issues.

 visit IT Service Portal	 (919) 684-2243	 click to chat
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