



Zscaler Application Contractor Adoption

Welcome Guide

Version 1.0

1/31/2020

Table of Contents

1. Welcome to the Zscaler Application	4
1.1 Why we’re reaching out?.....	4
1.2 What’s Next?.....	4
1.2.1 HARP ID Requirement.....	4
2. Installation and Getting Started.....	5
2.1 Functional Prerequisites.....	5
2.2 Technical Prerequisites	6
2.2.1 Windows	6
2.2.2 Mac.....	6
2.2.3 Whitelisting	6
2.2.4 Use of Corporate VPN	6
3. Available Documentation	7
3.1 HCQIS Confluence Pages.....	7
3.1.1 Non-Confluence Contractors	7
3.2 User Guide	8
3.3 Installation Instructions.....	8
4. Installation Support Information.....	10
4.1 During Initial Installations	10
4.1.1 HIDS Zscaler Adoption and Transition Support (ZATS).....	10
4.2 Once Implemented.....	10
4.2.1 Service Desk Information.....	10
Appendix A: Accessing FileCloud.....	11
Once FileCloud Access is Obtained.....	13
Appendix B: Record of Changes	14
Appendix C: Acronyms.....	15

List of Figures

Figure 1: Zscaler User Guide	8
Figure 2: Windows Installation Guide	8
Figure 3: Mac Installation Guide.....	9

List of Tables

Table 1: Record of Changes	14
Table 2: Acronyms	15

1. Welcome to the Zscaler Application

The Zscaler Application (ZApp) is a cloud hosted, HCQIS Infrastructure and Data Center Support (HIDS) supported service available to end users requiring access to tools and applications residing on the Centers for Medicare & Medicaid Services (CMS) Health Care Quality Information Systems (HCQIS) network. Utilizing HCQIS Access Roles & Profile (HARP) for authentication, the ZApp will be used more and more as we replace your Virtual Desktop Infrastructure (VDI) and remote access Virtual Private Network (VPN) connectivity technologies. It was selected, piloted, and deployed due to its ease of use, tight security, and cost feasibility.

1.1 Why we're reaching out?

This Welcome Guide takes you through the process that must be completed to begin using the ZApp within your organization. Each contractor's environment is different and HIDS will need to work closely with you and your Corporate IT support personnel in order to achieve a smooth and successful adoption of the ZApp service. HIDS would like to learn about your environment to understand what HCQIS and Corporate based services and applications are needed to perform your job. The HIDS Operations (OPS) team will assist with tailoring an environment for your specific network and configure the access points to the HCQIS Network.

1.2 What's Next?

HIDS will establish contact and work with the contractors assigned technical representative(s) to install and test the Zscaler App on a Contractor Furnished Equipment (CFE) device. To be successful the contractor point of contact must have IT technical knowledge of their infrastructure and elevated privileges to successfully complete the install.

Since you are going to be adopting the Zscaler app for your organization, you will need to get prepared for Zscaler installation using the prerequisites listed below in Section 2.1 of this Welcome Guide.

1.2.1 HARP ID Requirement

HARP IDs are required for accessing most new QualityNet Services such as the Zscaler App, FileCloud and Slack. As HCQIS integrates more and more systems with HARP, it is considered a requirement for all end users to obtain a HARP ID prior to attempting to access these systems.

To create a HARP account please follow the instructions and fill out the forms listed at <https://confluence.hcqis.org/display/HS/HARP>.

2. Installation and Getting Started

There are two categories of prerequisites that must be followed in order to successfully install and adopt the Zscaler App across your organization. The first, discussed below are Functional Prerequisites. These are steps that your organization must adhere to in order to begin using the service. The second set of prerequisites are the technical guidelines for your CFE device to begin the ZApp installation.

2.1 Functional Prerequisites

1. Your organization has completed the Zscaler Service Request Survey.
 - a. This survey was distributed along with the Zscaler App Memo and provides HIDS a glance inside your organization's infrastructure in order to better prepare our OPS team to support your adoption effort.
 - b. If you were not distributed the memo mentioned above, it is located on the QualityNet Services - Zscaler Information Confluence Page referenced in [Section 3.1](#) of this Welcome Guide.
2. Approval from CMS to move forward with the Zscaler App.
 - a. Your CMS COR must request approval from the CMS Government Task Lead. The answers provided in prerequisite [#1](#) above will be used in the process to determine your organizations need for the Zscaler App.
3. Technical IT representative(s) have been identified and are on-hand to assist your organization through the Z App adoption process.
 - a. This individual(s) will be the point of contact for HIDS for adoption support issues or questions.
 - b. This individual(s) must have Administrator privileges to their laptops and would preferably be the person overseeing the entire adoption process and point of contact for on-going support within your organization.
4. HARP IDs have been obtained by the technical representative(s) who are going to be performing the initial installations of the Zscaler App. Without a HARP ID the end user will not be able to access the application. Eventually HARP IDs will have to be gathered for all end users who will be using the Zscaler application.
 - a. HARP IDs must be added to the **HCQIS Zscaler Users** HARP entitlement group in order to gain access to the Zscaler App once installed.
 - i. Your organization's Security Officer (SO) must submit a ServiceNow request including the approved end user's HARP ID.
 - ii. If your organization does not have access to ServiceNow the request can be submitted by contacting the QualityNet Service Desk. Service Desk contact information can be found in [Section 4](#) of this Welcome Guide.

5. Corporate technical IT representative(s) have downloaded and saved the Installation packages and certificates onto the CFE that the Zscaler App will be installed upon.
 - a. The location of the Installation packages and certificates can be found in Section 3.1 of this Welcome Guide.

2.2 Technical Prerequisites

There are several technical guidelines for both Windows and Mac machines to be followed for the Zscaler App installation to be successful. The complete list of technical prerequisites can be found in each of the Zscaler App Installation Instructions referenced in Section 3 of this Welcome Guide.

Some high-level technical prerequisites are listed below.

2.2.1 Windows

1. Verify that Full Disk Encryption is enabled.
2. Verify that Windows Firewall is enabled.

2.2.2 Mac

1. Verify that Disk Encryption is enabled
2. An Antivirus or Anti-Malware client is active and installed.
 - a. Type of Antivirus or Anti-Malware is dependent upon your corporate guidelines.

2.2.3 Whitelisting

1. Have Corporate IT (Administrators) verify that your Anti-Virus and Firewall settings are configured to whitelist Zscaler.
 - a. Please reference the following link for configurations that need to be added to your Anti-Virus and Firewall settings.
<https://help.zscaler.com/z-app/zscaler-app-processes-whitelist>

2.2.4 Use of Corporate VPN

1. If your organization is using Split-Tunneling or Full-Tunneling settings within your VPN, please be prepared to share your VPN Hostname (or IP) with HIDS OPS.
 - a. Additional configurations may be required within your settings to properly route traffic and allow users to access both corporate systems as well as HCQIS systems simultaneously.

3. Available Documentation

3.1 HCQIS Confluence Pages

The following Confluence pages have been created to assist the HCQIS contractors to install, get starting using and to maintain a positive user experience on the Zscaler service.

Page	QualityNet Services - Zscaler Information Page
Description	This page will host all information regarding Zscaler and provide links to User Resources, other Zscaler informational pages, in-depth FAQ and Security Guidelines
Link	https://confluence.hcqis.org/display/HS/Zscaler

Page	Zscaler Installation Instructions
Description	This page includes all the files necessary to install the Zscaler App on either Windows or Mac machines. It includes instruction guides, Zip files with the packages and certifications. Additional information around the Installation Instructions can be found in <u>Section 3.3</u> of this Welcome Guide
Link	https://confluence.hcqis.org/display/HIDS/ZScaler+Installation+Instructions

Page	“How to Request” Zscaler
Description	This page includes the On-Boarding and Zscaler application adoption processes for both New and Existing contractors.
Link	https://confluence.hcqis.org/display/ICEL/How+to+Request%3A+Zscaler

3.1.1 Non-Confluence Contractors

Several contractors migrating to the Zscaler App may not have access to the HCQIS Confluence site. Since the Zscaler App installation packages, instructions and other information are stored on Confluence, HIDS has stood up a FileCloud instance containing the information that your organization will need.

To obtain access to FileCloud, a valid HARP ID is required, and the steps outlined in Appendix A of this Welcome Guide must be performed in order to request, access and obtain the Zscaler Application Installation Packages and documentation stored within FileCloud.

3.2 User Guide



Figure 1: Zscaler User Guide

The Zscaler User Guide contains a quick tutorial on how to access, Login and Logout of the Zscaler application once installed on your computer.

3.3 Installation Instructions

The Zscaler Installation Instructions page contains files and information that will allow for an easy install on both Windows 10 and Mac computers. Multiple files are available for download and include:

- Installation Guides
- Zscaler Installation Packages
 - Containing
 - The Zscaler App Client
 - Batch Scripts
 - Instructions
 - Certificates



Figure 2: Windows Installation Guide

The Windows 10 Installation guide provides step by step instructions to install and log into the Zscaler application on your computer. The guide contains prerequisites to follow prior to the install and directions with screenshots.

There is only a single Zip file to download for the Windows 10 installation.



Figure 3: Mac Installation Guide

The Mac Installation guide also provides step by step instructions to install and log into the Zscaler application on your computer. The guide contains prerequisites to follow prior to the install and directions with screenshots.

For Mac installs, there are two Zip files to download. One contains the Zscaler App Client with instructions and scripts and the second contains two certificates.

4. Installation Support Information

4.1 During Initial Installations

4.1.1 HIDS Zscaler Adoption and Transition Support (ZATS)

If you have received this document, the HIDS Zscaler Adoption and Transition Supports team has reached out to you or your organization to begin the process to transition over to the Zscaler App. The ZATS team consists of a Project Manager, HIDS Operations, HIDS Security and other key HIDS stakeholders.

Our goal is to provide your organization with the information and support necessary to install the Zscaler App onto a CFE machine with your appointed technical representative(s).

4.2 Once Implemented

4.2.1 Service Desk Information

Once you have successfully rolled-out Zscaler to your organization, If you are experiencing any issues with Zscaler such as installation, errors, loss of service or any other problems, please first reach out to your local Corporate IT support team to eliminate any local issues that could be a cause. Otherwise, please contact the QualityNet Service Desk @ 866-288-8914 or via email at qnetsupport@hcqis.org. Business hours are 7 am- 7 pm CDT Monday through Friday.

Please provide as much information, error codes or screenshots if possible, to allow for quick troubleshooting.

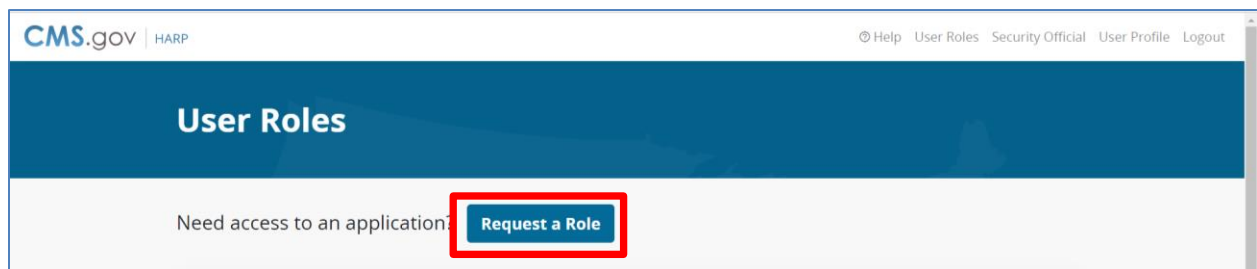
Appendix A: Accessing FileCloud

If you have a valid HARP ID, the following steps must be performed in order to request access to FileCloud and be added to the FileCloud User Role within HARP – this is needed if you do not have access to HCQIS Confluence site. This access is only needed for the Corporate technical IT representative performing the install during initial setup.

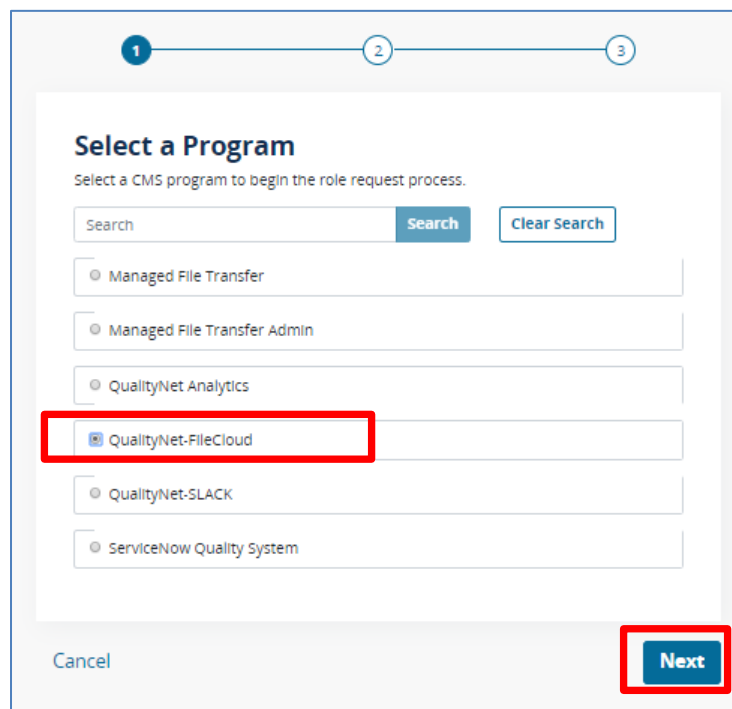
1. Login to HARP (<https://harp.qualitynet.org/login/>)
 - Go to User Roles



2. “Request a Role” via User Roles:



3. Select the “QualityNet-FileCloud” Program, click “Next”



4. Select your Organization from the List, click “Next”

Select an Organization
Select an organization for the QualityNet-FileCloud program.

Search

- ADO - Ventera Corporation (ESS)
- ADO - Ventera Corporation (IQIES)
- ADO-DSFR-Booz Allen Hamilton
- ADO-HIDS-Ventech Solutions
- ADO-PM3-Tantus Technologies
- BFCC-BCMP-Provider Resources
- BFCC-NCORC-Avar Consulting
- BFCC-T02-Keipro
- BFCC-T02-Livanta
- CMS Federal
- ESRD NCC Health Services Advisory Group
- ESRD NW-1 Island Peer Review Organization Inc

5. Select a FileCloud Member role (Security Officer (SO) or User), select Submit:

Select Roles
Select one or many roles for the level of access you need for ADO-HIDS-Ventech Solutions.

Search

- FileCloud-SO
- FileCloud-User

Cancel

6. Your organization's SO approves the user role request. You will be notified via email when your role has been approved.
7. Log in to FileCloud at <https://filecloud.hcqis.org> using your HARP credentials. This will create your user profile, and you will have access to the My Files folder.

8. Send your SO your HARP ID. This step is required to gain access to team folders.

Once your SO has provided your HARP ID to the FileCloud Onboarding Team and you login to FileCloud, you will have access to team folders.

SOs should forward HARP IDs to the FileCloud Onboarding Team via email HIDS-Contractor-Onboarding@hcqis.org.

Once FileCloud Access is Obtained

Once the user has access to FileCloud, they will need to be added to a specific folder hosting all the Zscaler App documentation. The following steps are required to obtain this access.

1. Submit a ServiceNow request access to the “CMS Enterprise Software Distribution Site\Zscaler” FileCloud folder.
 - a. This ticket will be routed to the HCQIS_OPS_TOOLS team for completion.
2. Once added to the FileCloud folder, the end user can log into FileCloud at <https://filecloud.hcqis.org/> using their HARP ID.

Appendix B: Record of Changes

Table 1: Record of Changes

Version	Date	Author/Owner	Change Description
1.0	1/20/2020	Ventech	Final

Appendix C: Acronyms

Table 2: Acronyms

Acronym	Definition
CFE	Customer Furnished Equipment
CMS	Centers for Medicare & Medicaid Services
HARP	HCQIS Access Roles & Profile
HCQIS	Health Care Quality Information Systems
HIDS	HCQIS Infrastructure and Data Center Support
OPS	HIDS Operations
SO	Security Officer
VDI	Virtual Desktop Infrastructure
VPN	Virtual Private Network
ZApp	Zscaler Application
ZATS	Zscaler Adoption and Transition Support