# Hosted Solution User Guide

Citrix Workspace

# Table of Contents

## Download

**1** Navigate to

HTTPS://www.citrix.com/downloads

Click the CITRIX WORKSPACE APP button. The Citrix Workspace App download webpage appears.

**2** Under the section sub-heading: Workspace app for <Operating System>, click the link, CITRIX WORKSPACE APP <VERSION #> FOR <OPERATING SYSTEM>. The site navigates to the page for that operating system and the DOWNLOAD button appears.

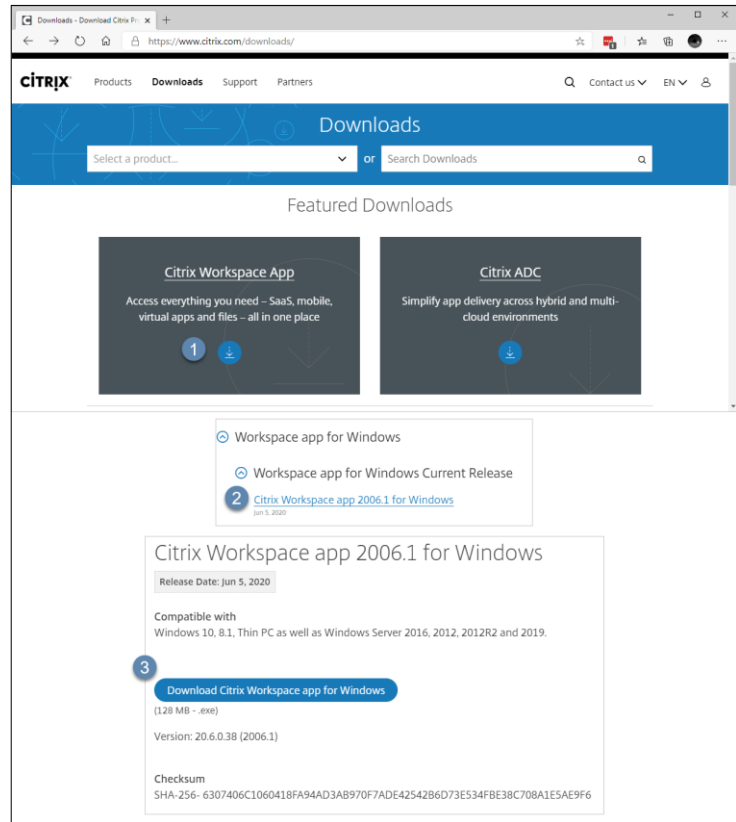**3** Click the DOWNLOAD CITRIX WORKSPACE APP FOR <OPERATING SYSTEM> button. The download will begin.

Operating systems, browser security settings, and, or security protocols determine if an additional confirmation dialog box appears or not.



Figure 1: Citrix Workspace App Download. Flow of Webpage Links.

Additionally, many users do not have permission to install software. If this is the case, obtain authorization prior to proceeding.

Click the **DOWNLOAD CITRIX WORKSPACE APP FOR WINDOWS** button. If you are using a Mac, the button will be labelled for a Mac.

Click the Open File link that appears in the lower, left-hand corner of the browser window. Note that different browsers handle executable file downloads differently. Open, launch or run the installer file.
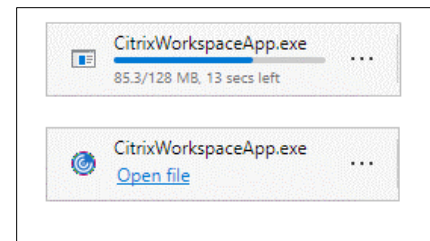


Figure 2 Click Open File

# Install

Depending on the operating system and security settings, a computer administrator or IT department official may be prompted to allow the installation to proceed. This is not illustrated.

When permission is granted, then, the Citrix Workspace installer displays the Welcome dialog box.

Users are encouraged to read the welcome message.

## Click Start

Click the START button. The Citrix Workspace installer displays the License Agreement dialog box.

**1**

## Click Install

**2**

Check the checkbox to the left of "I accept the license agreement. The Citrix Workspace installer enables the INSTALL button. Click the INSTALL button.
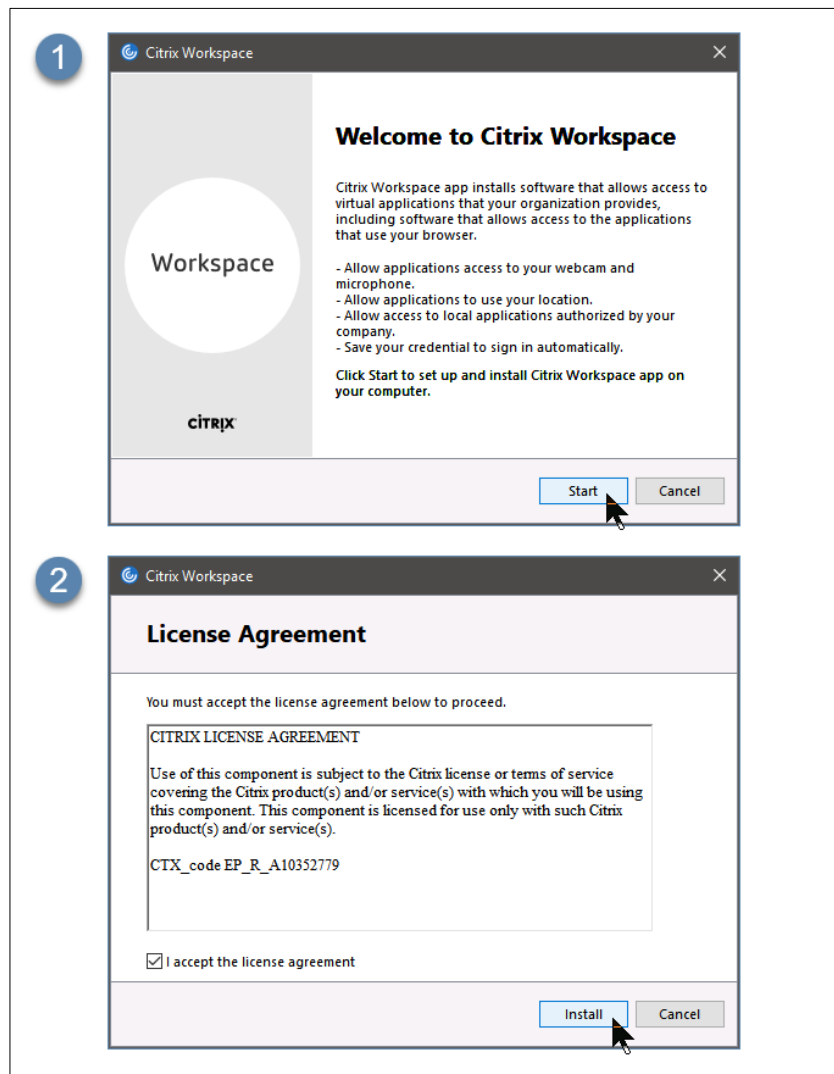
The Citrix Workspace App Installer proceeds.

Figure 3 Welcome Dialog Box & Licensing Agreement

# Do Not Check the box for App Protection

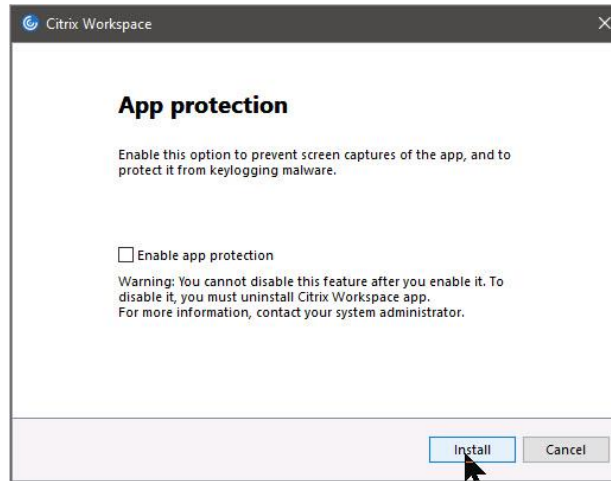Current guidance. Do not check the checkbox for ENABLE APP PROTECTION.



Figure 4 Do not check the checkbox for Enable App Protection.

# Do Not Enable Single Sign-on

*This dialog box appears only for Domain-Joined Machines.*

Current Guidance During installation, computers that are part of a domain will see the Enable Single Sign-on dialog box. Do not check the ENABLE SINGLE SIGN-ON checkbox.

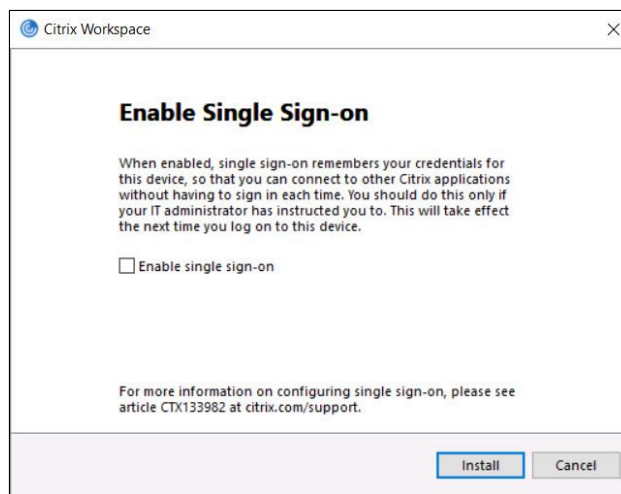This is very important. Do not check the ENABLE SINGLE SIGN-ON checkbox.



Figure 5 Click Install. Do not check ENABLE SINGLE SIGN-ON.

## Click Install

Click the ɪɴsᴛᴀʟʟ button at the bottom right-hand corner of the dialog box to proceed.

The Citrix Workspace installer displays the Installation successful dialog box.

## Click Finish

Click the ꜰɪɴɪsʜ button. The Citrix Workspace App installer closes.

The installation process is complete. No further action is required.

## Do Not Click Add Account Button

Do not click the ᴀᴅᴅ ᴀᴄᴄᴏᴜɴᴛ button. This is very important. Do not click the ᴀᴅᴅ ᴀᴄᴄᴏᴜɴᴛ button.



Figure 6 Installation Successful

Activating the account for the Citrix workspace desktop app will be covered in a separate section of this user guide. See Activate Citrix Workspace desktop application on page **#12**. However, web activation cannot be undertaken until the next sections of this user guide are completed successfully. Continue to the next section to proceed.
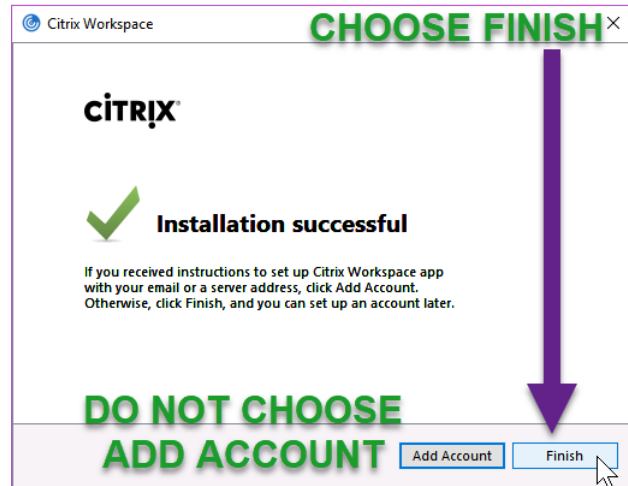
## Log In

This section provides details about how to log in for the first time and begin using solutions hosted by Wizard Software.

Navigate to LogIn.WizardSoftware.Net. When the webpage appears, enter the credentials provided by Wizard Software. Note: The password included in the new user email message is single-use. Be prepared to create a new, 60-day password.
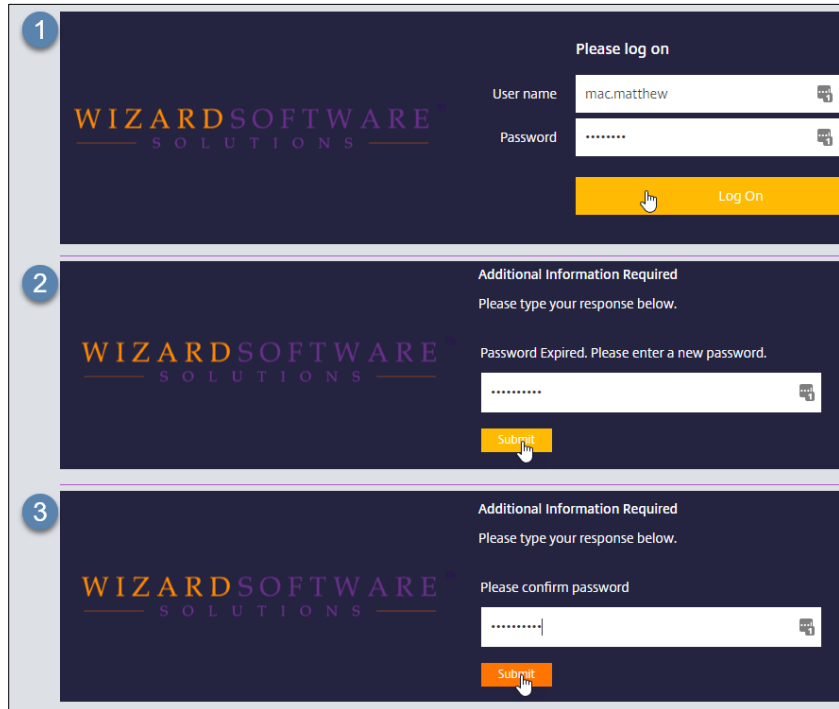


Figure 7 Log On Web Page

**1** Click the LOG ON button. The browser displays the password reset page. *Incidentally, please note that this is the same page that is used when a password reset is requested.*

**2** Enter a new password. Click the SUBMIT button.

**3** Confirmation is required. Type the new 60-day password again on this web page.

## Password Guidelines

- 7 characters or more.
- Upper case letters, numbers or special characters may be used.
- 10 previous passwords disallowed.
- Expiration is 60 days.

When the two passwords match, the webpage automatically navigates to the Citrix Workspace app webpage and hosted applications will be displayed. This is discussed in the very next section of this user guide.
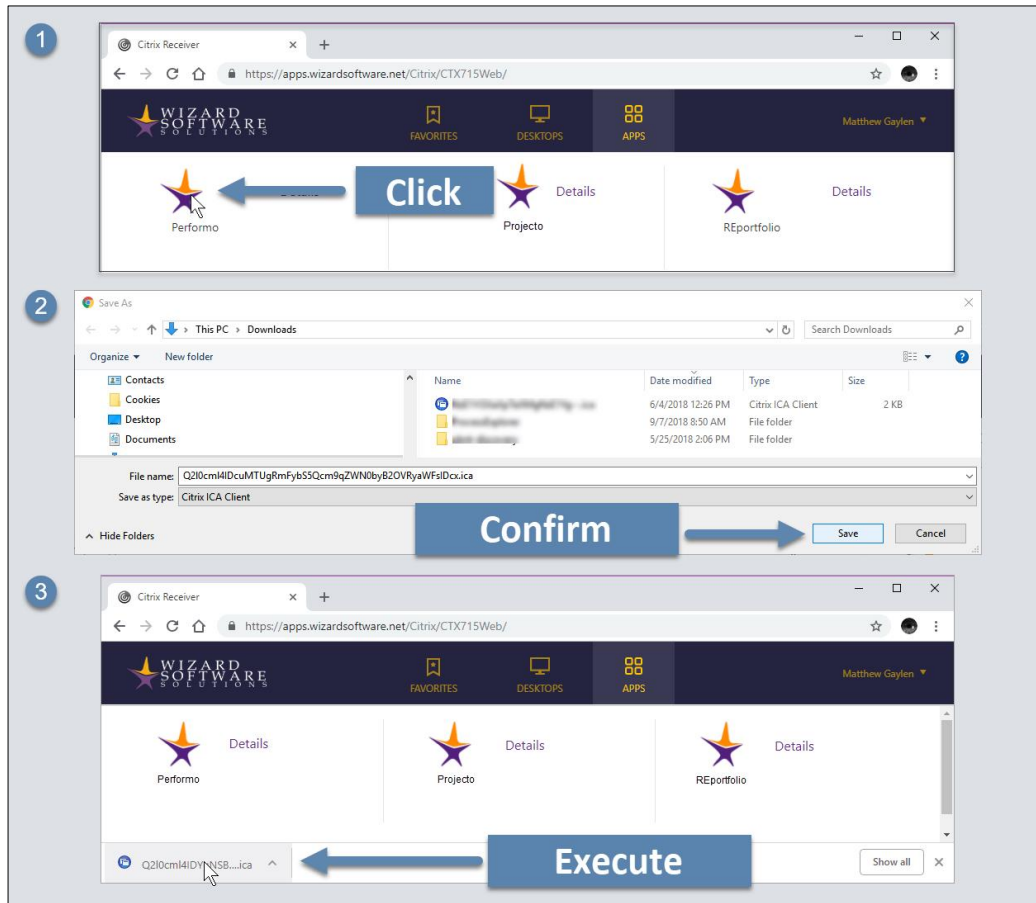
# Apps



Figure 8 Hosted Applications

The Citrix workspace webpage displays hosted solutions. Many users will see only one item. This is normal. The number of solutions displayed, matches the number of Wizard Software solutions in use by the company, corporation or institution.
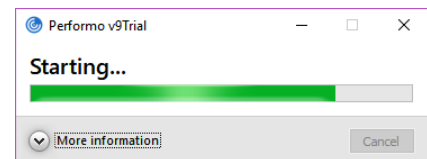


Figure 9 Hosted Solution Starting

**①** **Click** the solution icon. Depending on the browser in use and security settings, a Save As dialog box may appear. If the Save As dialog box appears, click the ꜱᴀᴠᴇ button.

**②** **Confirm.** Again, depending on browser and security settings, it may be necessary to click again to confirm that the solution has permission to launch.

**③** **Execute.** Click the downloaded file. No further login will be required; the hosted solution will open.

# Citrix Workspace – Security Warning

When the solution is launched for the first time, a security warning appears. The security warning says, "An online application is attempting to access files on your computer." There are three options and a checkbox.
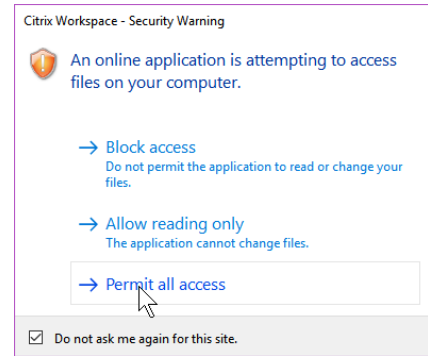


Figure 10 Citrix Workspace Security Warning

## Block Access

"Do not permit the application to read or change your files." Choosing this option prohibits the hosted solution from starting. This option requires starting over. Click the solution icon on the website to re-initiate the process. See Apps on page #8. Elevate privileges to Allow Reading Only or, Permit All Access. See Figure 10. See also Preferences on page #15.

## Allow Reading Only

"The application cannot change files."

- Uploading is permitted.
- Downloading is prohibited.
    - NOTE: See Figure 11. The USER folder will not be available on subsequent logins. Therefore, do not save to the USER folder. Click NO to proceed.
- If downloading is necessary, elevate privileges to PERMIT ALL ACCESS. See Figure 10. See also Preferences on page #15.
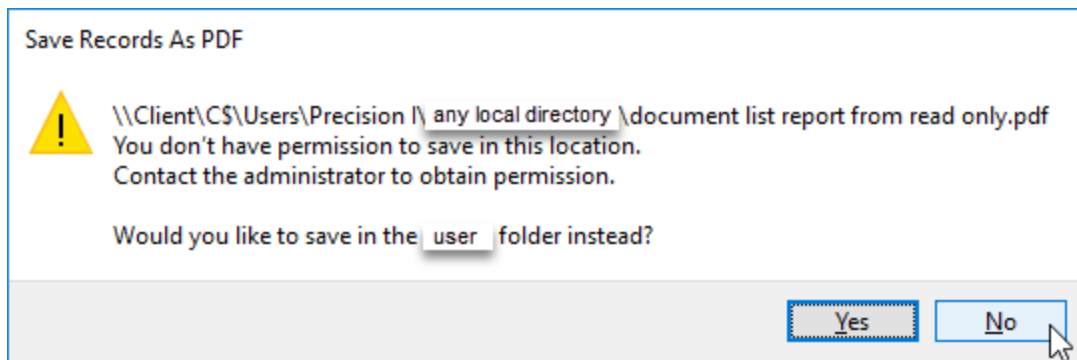


Figure 11 This error message appears when the Allow Reading Only option is chosen.

**NOTABLE EXECPTION**

When printing reports from within the hosted solution; saving as PDF to any local directory that users can access is enabled.

## Permit All Access

Choosing this option enables all hosted solution features and functions.

## DETOUR: File Access in the Citrix Workspace

It is important for users of hosted solutions to understand that the hosted solution is running on another computer in another location.



Figure 12 Citrix Workspace Diagram – file locations in operating system dialog boxes.

The hosted solution runs within the Citrix Workspace on the other computer in the other location. So, when operating system dialog boxes appear in the hosted solution, QUICK ACCESS and THIS PC refers to the hosted-solution-user's computer. The LOCAL DISK directory in that dialog box points to that *other* computer in the *other* location.

No files can be saved to or should be uploaded from the LOCAL DISK directory.



To clarify, QUICK ACCESS and THIS PC directories are the user's physical computer – usually close by enough that it can be physically touched.

Figure 13 Operating System Dialog Boxes in the Citrix Workspace Environment

The other computer in the other location cannot be physically touched. That's a good way to think about it. QUICK ACCESS & THIS PC refer to the computer that can be touched… LOCAL DISK refers to the computer than cannot be touched.

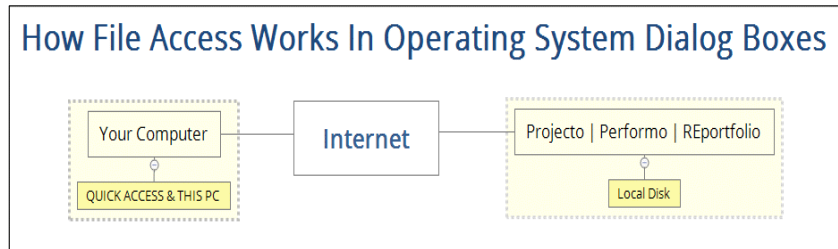# The Details Button

The DETAILS button appears next to every hosted solution icon. Click the DETAILS button.  The web browser displays the detail screen. Options include, OPEN and ADD TO FAVORITES.
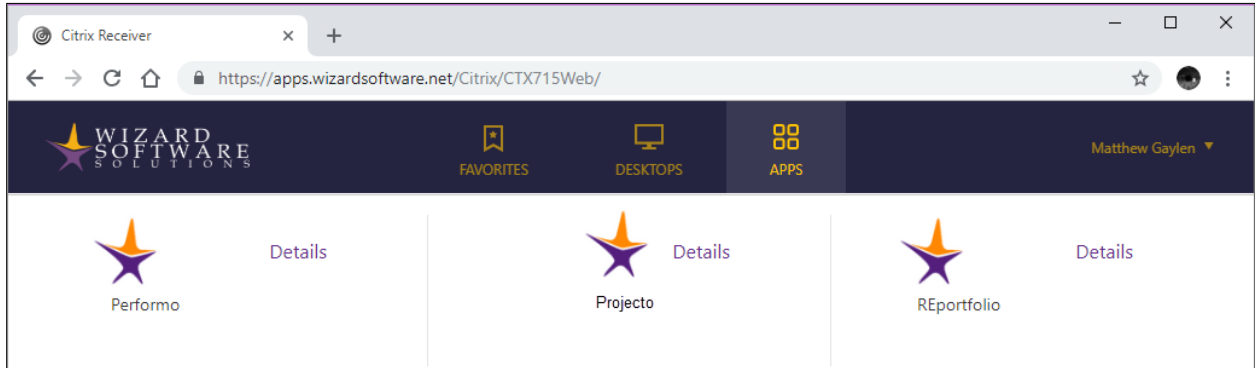


Figure 14 Hosted Solutions

The ADD TO FAVORITES option places the icon on the Favorites screen. This is redundant in situations where there are only 1-3 hosted solutions.
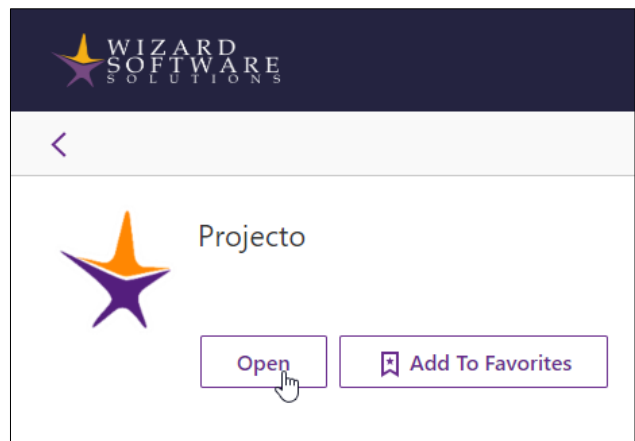


Figure 15 Hosted Solution Details

# Activate Citrix Workspace desktop application

The best and simplest way to activate, register and add an account to the Citrix Workspace desktop application is to us the Activate option from the LOGIN.WIZARDSOFTWARE.NET website. The Activate option from the LOGIN.WIZARDSOFTWARE.NET website automatically adds all the necessary account and configuration information to the Citrix Workspace Desktop application. The user is not required to know or enter any information.

**ACTIVATING FROM THE WEB SITE**

From the LOGIN.WIZARDSOFTWARE.NET website note the username is displayed on the top, right-hand side of the web page. The User Preferences button appears in the shape of a downward facing triangle on the right-hand side of the username. Click the USER PREFERENCES button. The pages displays a user preferences menu. User Preferences menu options include, Activate, Download Citrix Receiver, Change Password, About, and Log Off.

1. Choose the ACTIVATE option.

2. Depending on browser security settings, the Save As dialog box may appear. Save, then launch the Activate application.

3. The Citrix Workspace app displays a dialog box. "Do you want to add CTX715 provided by…". Click the ADD button. The Citrix Workspace app displays the credentials dialog box.

Figure 16 Citirx Desktop Workspace Application: Automatic Account Activation

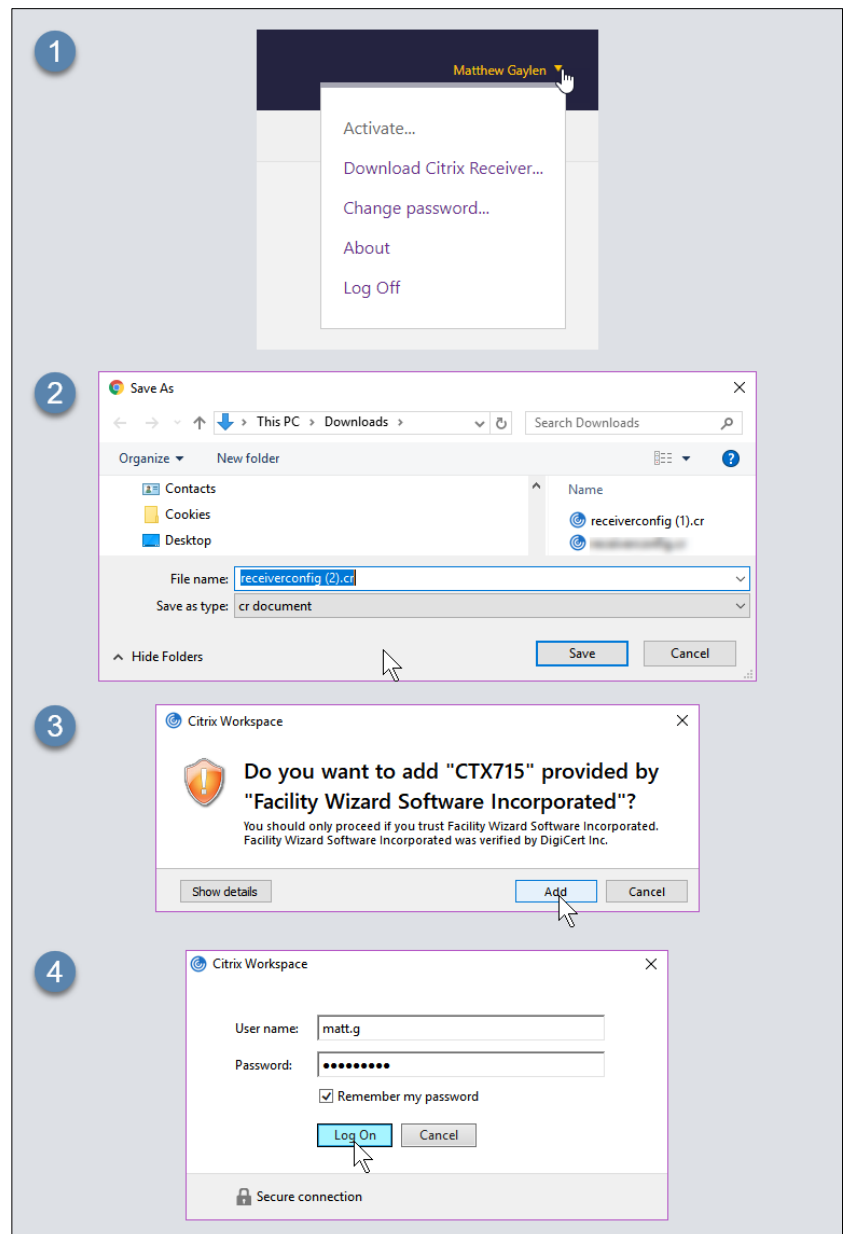4. Enter user name and password. Check the REMEMBER MY PASSWORD checkbox if desired and click the LOG ON button.

**CITRIX WORKSPACE DESKTOP APP**

There are at least two ways to open Citrix Desktop Workspace App.

A. Click the CARET in the Task bar. Windows will display Taskbar icons. Some icons appear in the taskbar and some appear in a secondary panel.

The Citrix icon is a blue circle with concentric white semi-circles. Click the CITRIX icon to start the Citrix Desktop Workspace application.

B. Click the CORTANA SEARCH button.
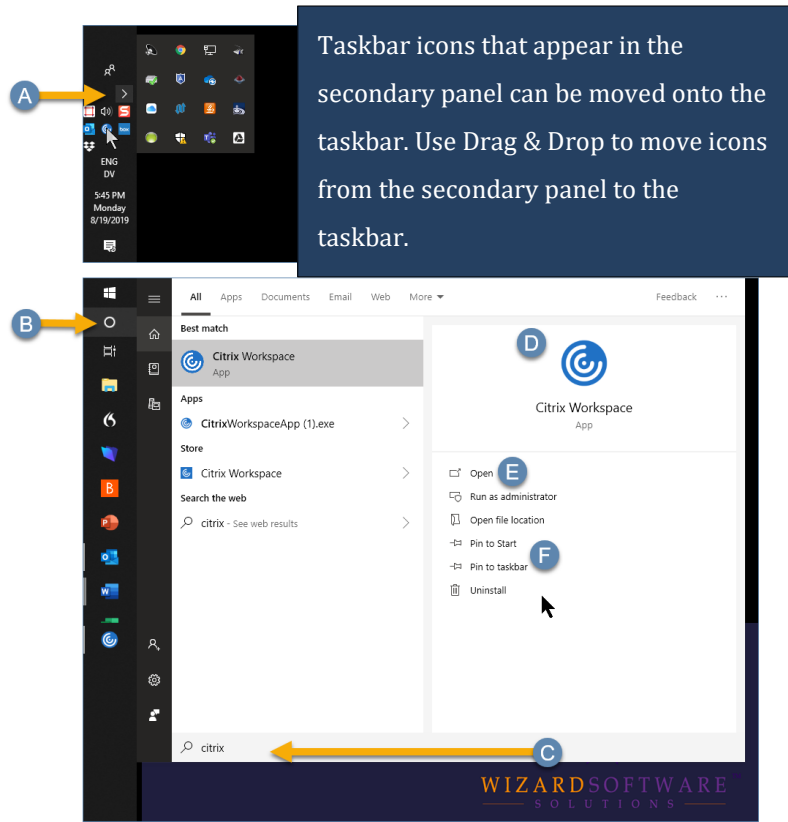
C. Enter the word, Citrix. Windows displays the icon for Citrix Workspace.



Taskbar icons that appear in the secondary panel can be moved onto the taskbar. Use Drag & Drop to move icons from the secondary panel to the taskbar.

Figure 17 Starting Citrix Workspace Desktop Application

D/E. Click the CITRIX WORKSPACE APP icon or the OPEN button to launch the Citrix Desktop Workspace.

F. For future use, click the PIN TO START or PIN TO TASKBAR button. Windows will place an icon in the start menu or the taskbar. Henceforth, either option can be used to start the Citrix Workspace Desktop application.
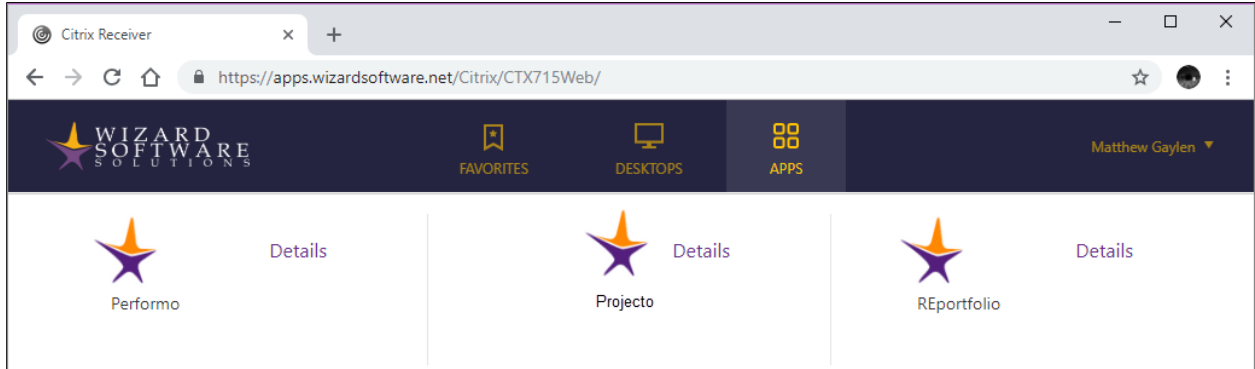
Figure 18 Citrix Workspace Desktop App

Account information is automatcially added to the Citrix Workspace Desktop App and the new account is set up and configured automatically. The Citrix Workspace Desktop app also launches and automatically displays hosted solutions.

The Citrix Workspace desktop app is exactly the same as the web app, except it operates from the user's desktop. When the desktop app is used; no web browser is required to launch hosted solutions. This may be useful in situations where the operating system or security settings prohibit websites from launching executable files.

## Preferences

Preferences can be accessed from the Windows Notification area.

**1** Right-Click the CITRIX icon in the Windows Notification area. A pop-up menu appears.

**2** Choose CONNECTION CENTER from the pop-up menu.

**3** Click the PREFERENCES button on the right side of the Citrix Connection Center panel.

**4** Click the READ AND WRITE option. This will enable all hosted solutions features and functions. Click the OK button. The Preferences panel will close.

Click the CLOSE button on the Citrix Connection Center panel.

If the settings are not applied immediately, log off and log back in. The settings will be applied.
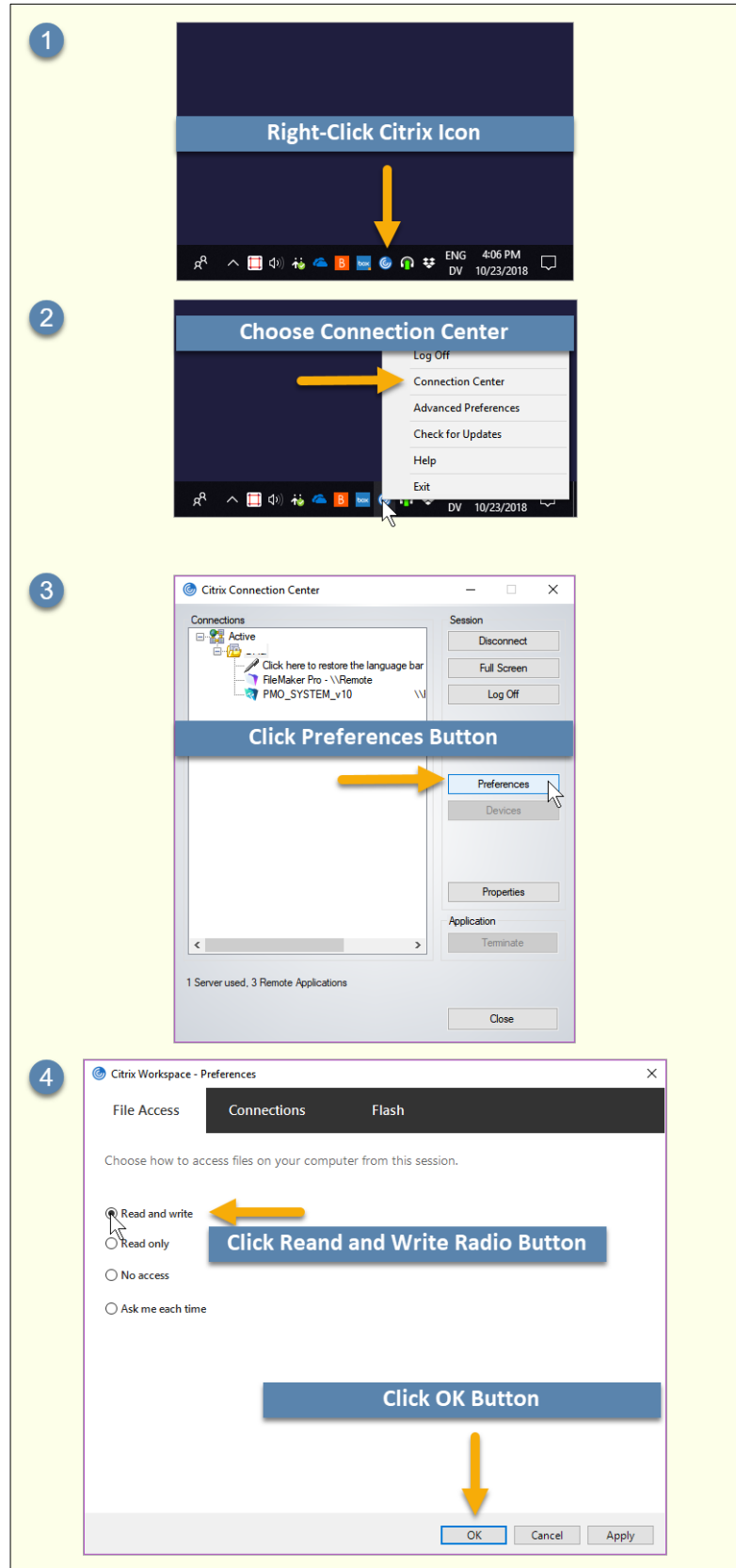
Figure 19 Citrix Workspace Preferences

## Password Reset

A website has been set up to accommodate users in the unlikely event that it becomes necessary to reset a password.

1) Navigate to
https://pwreset.wizardsoftware.net

2) Enter the user name and the email address of the account-holder.

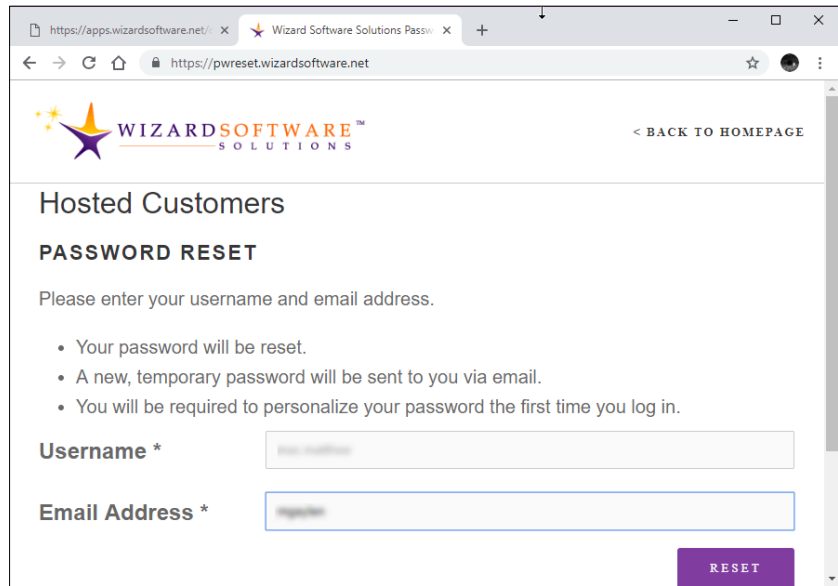3) Click the RESET button.

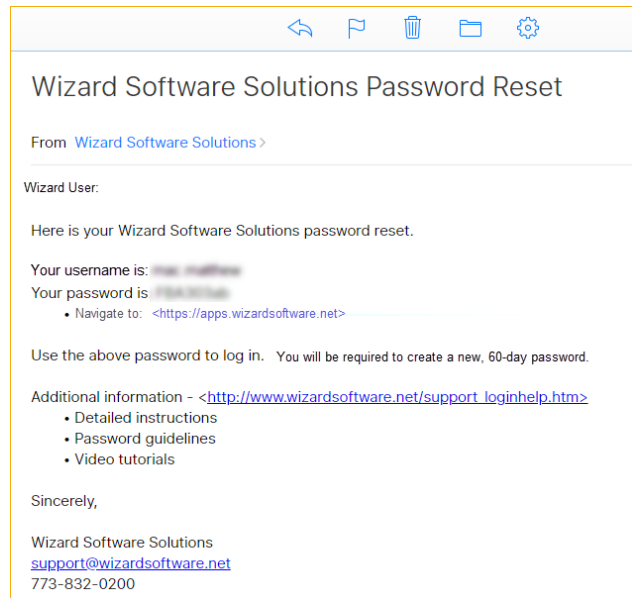New credentials are sent.



Figure 20 Hosted User Password Reset



Figure 21 New Credentials Email Message
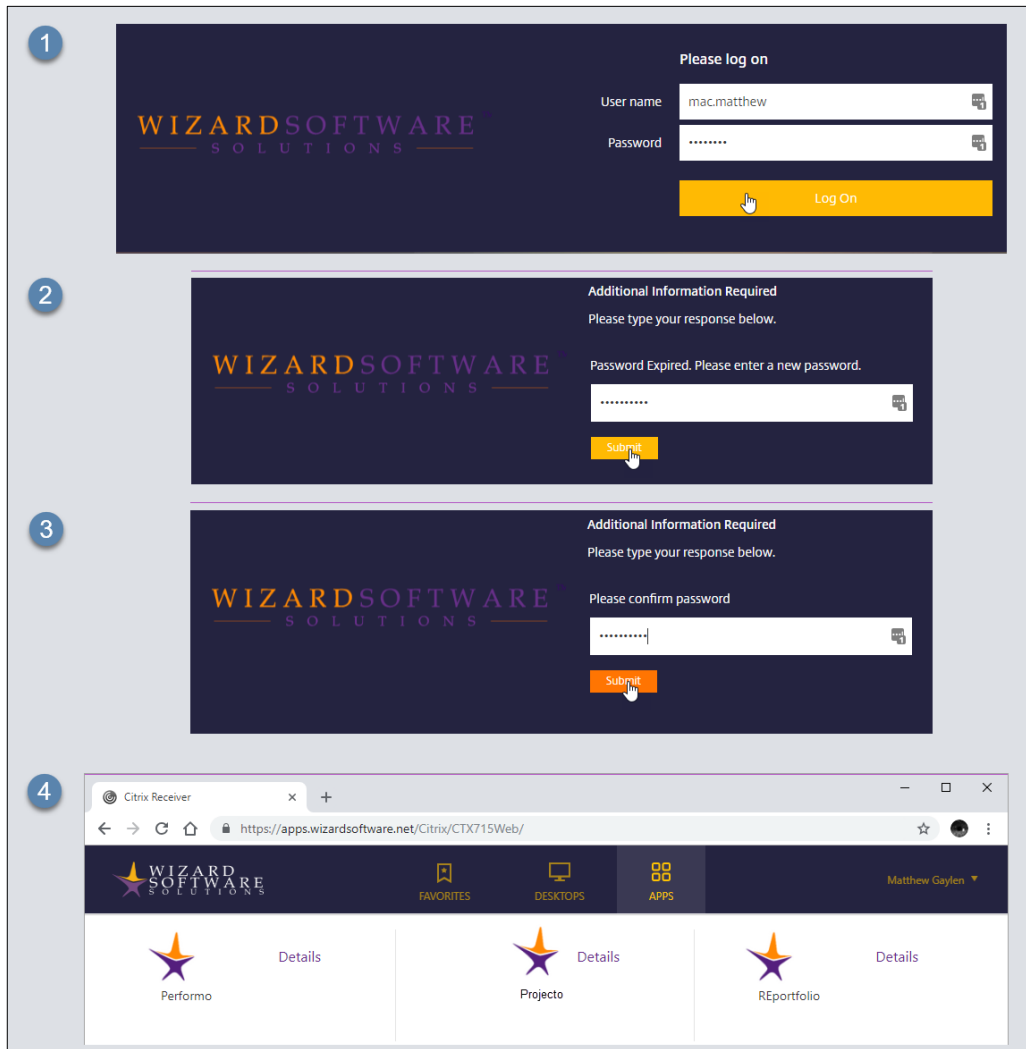
Figure 22 Logging in with new credentials

## New Credentials

The email message provides a link to the login page. Click the link. The browser displays the log on page.

**1**

Enter credentials. Click the **LOG ON** button. The browser displays a web page that is used to create a 60-day password.

**2**

Enter 60-day password. Click the **SUBMIT** button. The browser displays the confirmation page.

**3** Enter the 60-day password again. Click the **SUBMIT** button.

**4**

The browser displays the Citrix Workspace. Click the icon to launch the hosted solution.

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Password Guidelines

- 7 characters or more.
- Upper case letters, numbers or special characters may be used.
- 10 previous passwords disallowed.
- Expiration is 60 days.

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# List of Figures