



Hosted User Guide

A guide to installing, configuring and using Citrix Receiver to access REportfolio, Projecto and Performo.

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Citrix Receiver

Citrix Receiver is required to access solutions hosted by Wizard Software. Proceed only after consulting with your department head and your IT department.

IMPORTANT NOTE: If you have a previous version of Citrix installed, then you must check with your IT department to make sure Citrix Receiver 4.x is compatible with the other applications you access via Citrix.

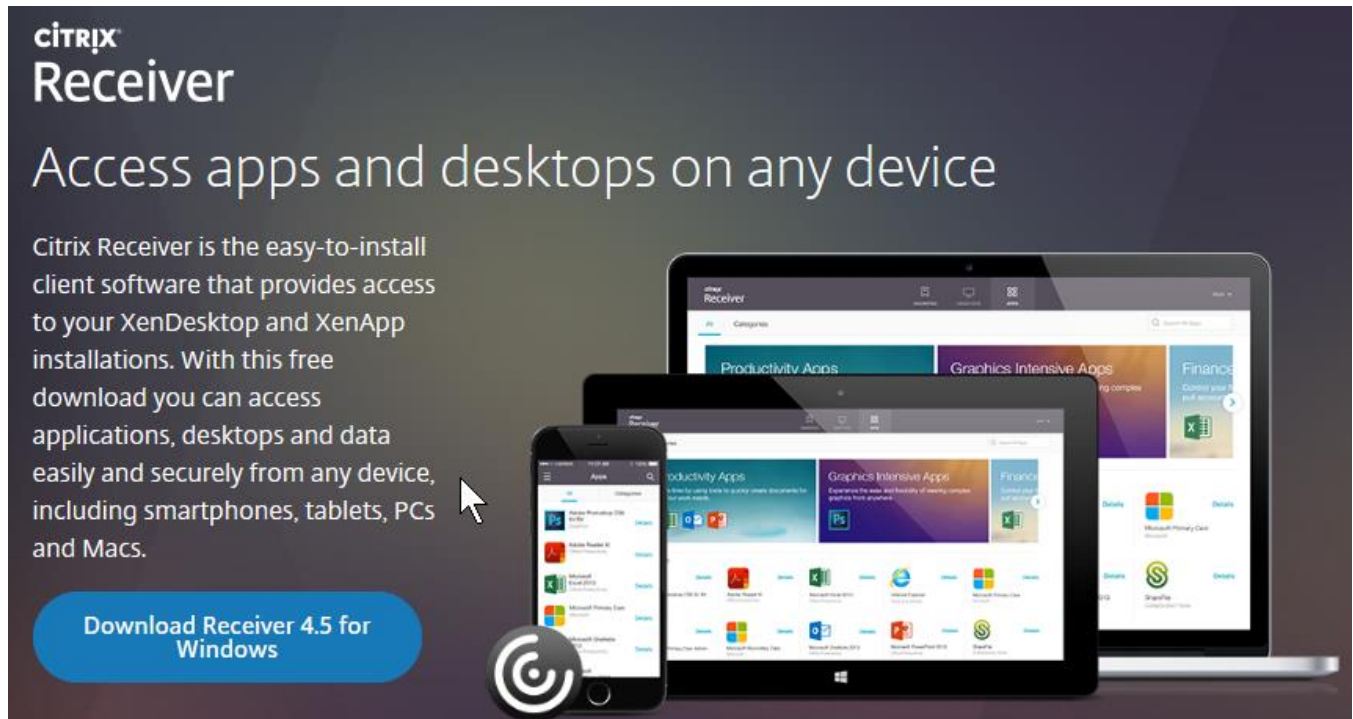
New Feature: as of July 1, 2015 the Citrix Receiver installation package comes with a built-in Citrix Clean-Up Utility that removes previous versions of Citrix while preserving previously set up *stores* and settings.

There is also a dedicated, stand-alone [Citrix Clean-Up Utility](#) The Receiver Clean-Up Utility removes components, files, and registry values of Online Plug-in 11.x, 12.x, and Receiver for Windows 3.x, 4.x (Online Plug-in 13.x, 14.x). This includes the Offline Plug-in component if installed. [This article provides details.](#)

OVERVIEW

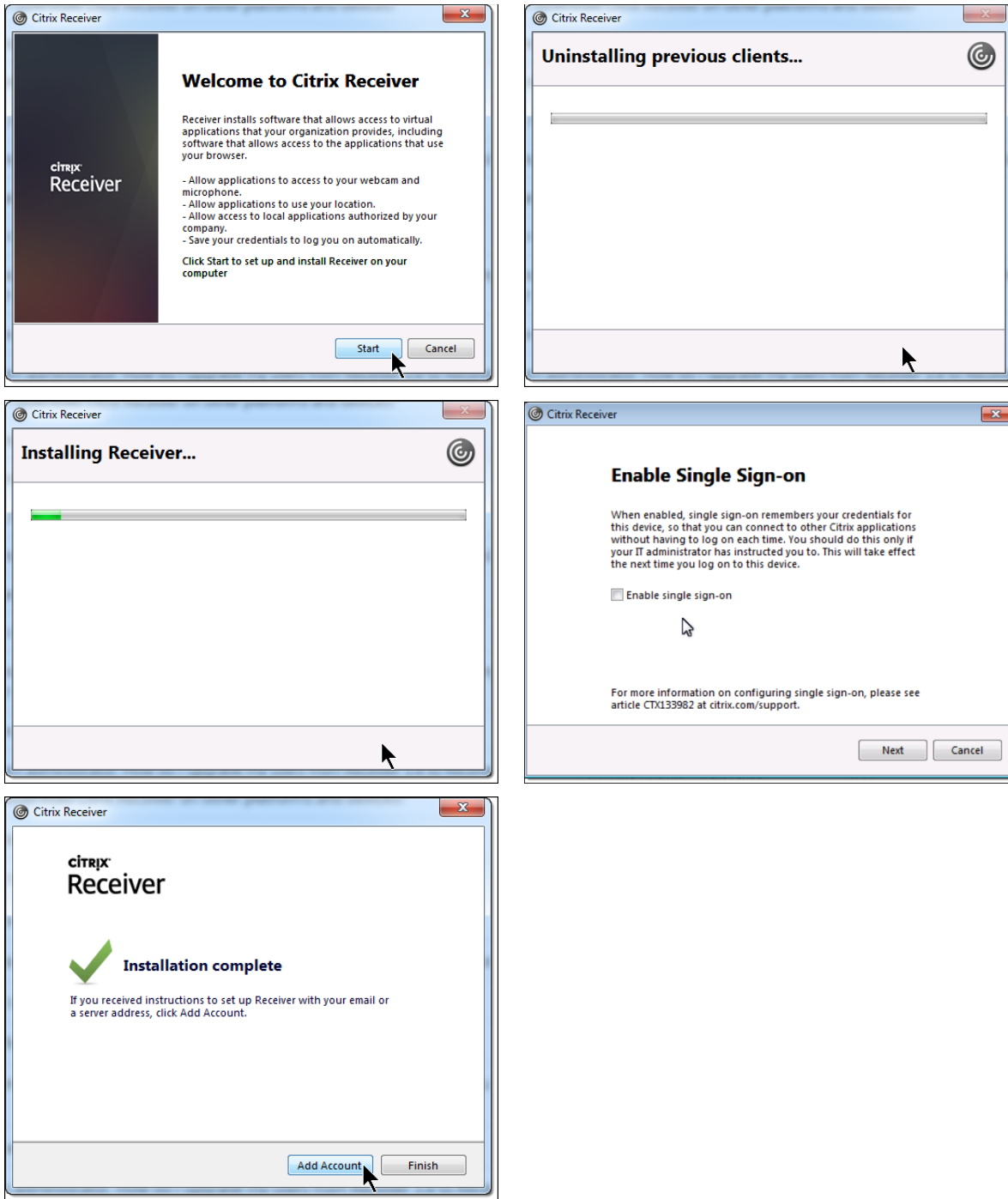
- Remove Citrix Receiver if desired, if necessary and if approved by the IT department.
- Reboot if you have run the Citrix Clean-Up Utility
- Download [Citrix Receiver](#)
- Install Citrix Receiver.

Download [Citrix Receiver](#). Proceed only after consulting with your department head and your IT department.

The image is a promotional graphic for Citrix Receiver. At the top left, the Citrix logo is followed by the word "Receiver" in a large, white, sans-serif font. Below this, the headline "Access apps and desktops on any device" is written in a smaller white font. A paragraph of text follows: "Citrix Receiver is the easy-to-install client software that provides access to your XenDesktop and XenApp installations. With this free download you can access applications, desktops and data easily and securely from any device, including smartphones, tablets, PCs and Macs." To the right of this text, there are three devices: a smartphone, a tablet, and a laptop, all displaying the Citrix Receiver interface. The interface shows a grid of application tiles with icons for Word, PowerPoint, Excel, and other productivity tools. A blue button with white text "Download Receiver 4.5 for Windows" is positioned at the bottom left of the graphic. A mouse cursor arrow points towards the text "including smartphones, tablets, PCs and Macs." The background is a dark, gradient color.

Citrix Receiver Internet Landing Page – Automatically detects your operating system.

Citrix Receiver Installation

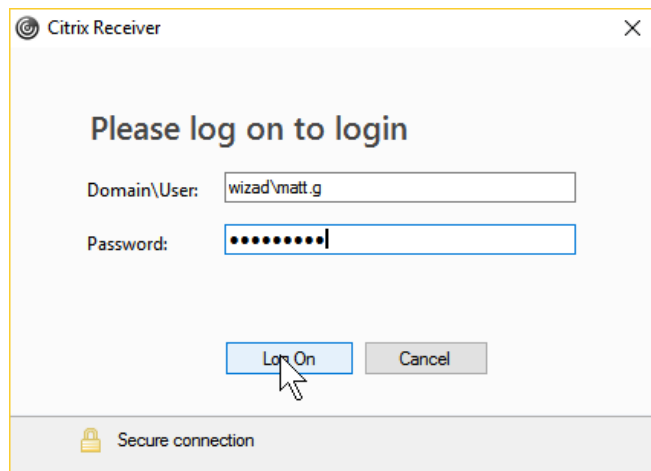
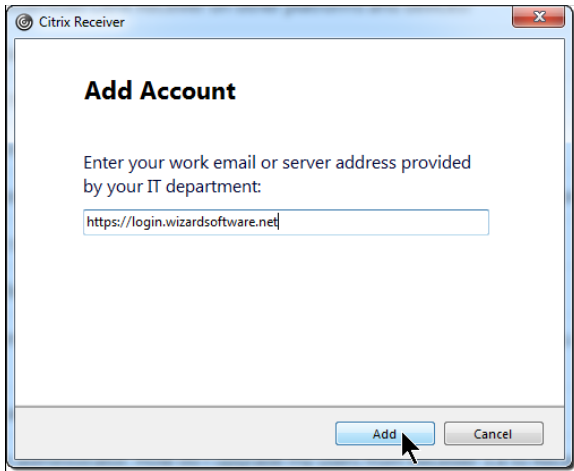


SINGLE SIGN-ON – check the box to enable Single Sign-on if you have been instructed to do so in the email that is sent to you by Wizard Software. At this point you have a decision to make. The wizard supports both. Some networks do not allow *websites* to launch third-party applications such as Citrix Receiver. On the other hand; some networks do not allow *third party applications* such as Citrix Receiver to access the Internet. Consult with IT for guidance.

To choose Option #1: Click **Finish** to complete the Citrix Receiver installation and proceed to Page #10: Using Internet Explorer to Access Hosted Applications

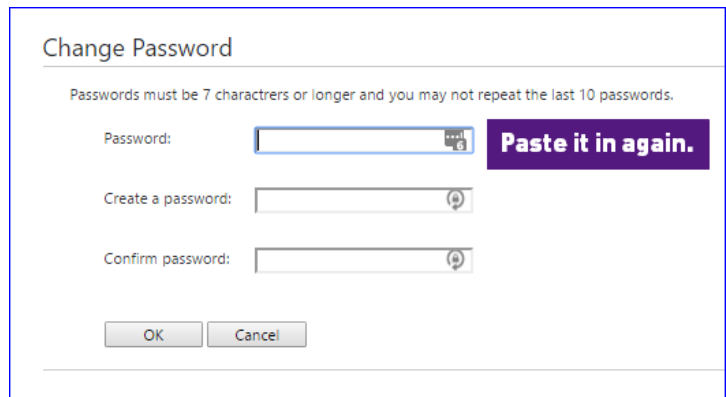
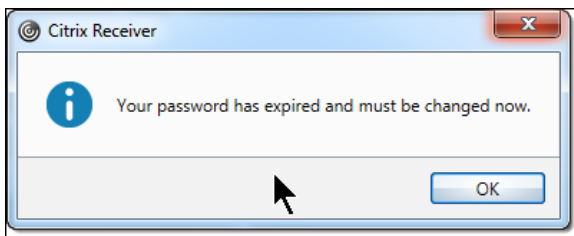
To choose Option #2: Click **Add Account** to proceed with the Citrix Receiver desktop application (continue to next page).

Add Account



- **ADD ACCOUNT:** Your work email is not needed or used. Enter the Wizard Software server address: <https://login.wizardsoftware.net> Click **Add** to proceed.

- **LOG ON:** for Domain\User, use the following syntax: **WizAD\User.Name**
 - 'Wiz' is short for Wizard and 'AD' is short for Active Directory... this is how you connect to your hosted application – via your Wizard Software Solutions Active Directory account. There is no letter 'R' in the domain name; WizAD... If this is a first-time installation: you will see these dialog boxes:



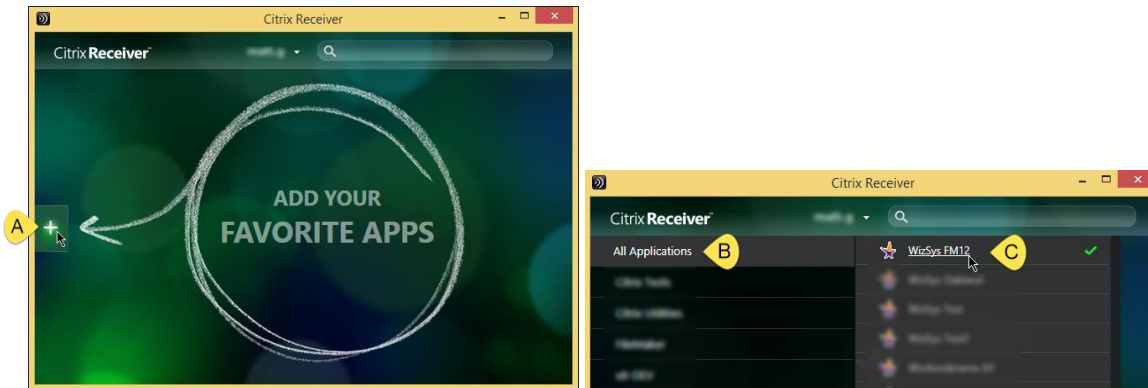
Password Guidelines

- Passwords must be seven (7) characters or more.
- Upper case letters, numbers or special characters may be used.
- You may not recycle your previous ten (10) passwords.
- Passwords expire every 60 days.

(if this does not work the first time you try it... use Internet Explorer to navigate to <https://login.wizardsoftware.net> to complete the password setup... you can then continue to set up the Citrix Receiver desktop application).

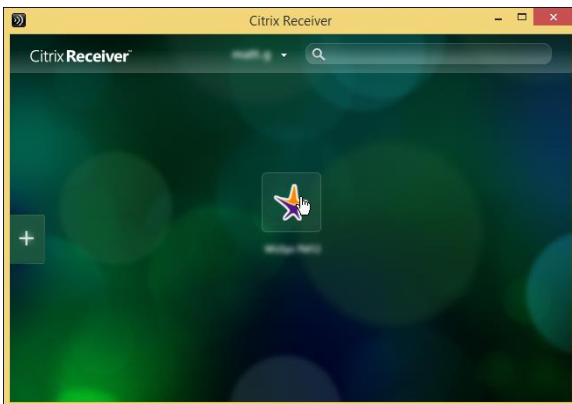
Add Hosted Applications

When you click the Log On button for the first time; the Citrix Receiver application window opens. This is a one-time set-up procedure... you will only have to do this the first time you log in.



- A. Click the '+' icon to add your hosted application to the Citrix Receiver desktop environment.
- B. Click All Applications to view the list of hosted applications.
- C. Click the application name to move it to the Citrix Receiver desktop.
Repeat if necessary, to add additional hosted applications to the Citrix Receiver desktop.

Note: The list you see will only include applications that you are allowed to access. The figure above illustrates a generic application name in the Citrix Receiver drawer... on your screen, the solution name will be specifically, uniquely labelled for your company. Look for the application that Wizard Software Solutions is hosting for you – in most cases, there will be only one, two or three at most.

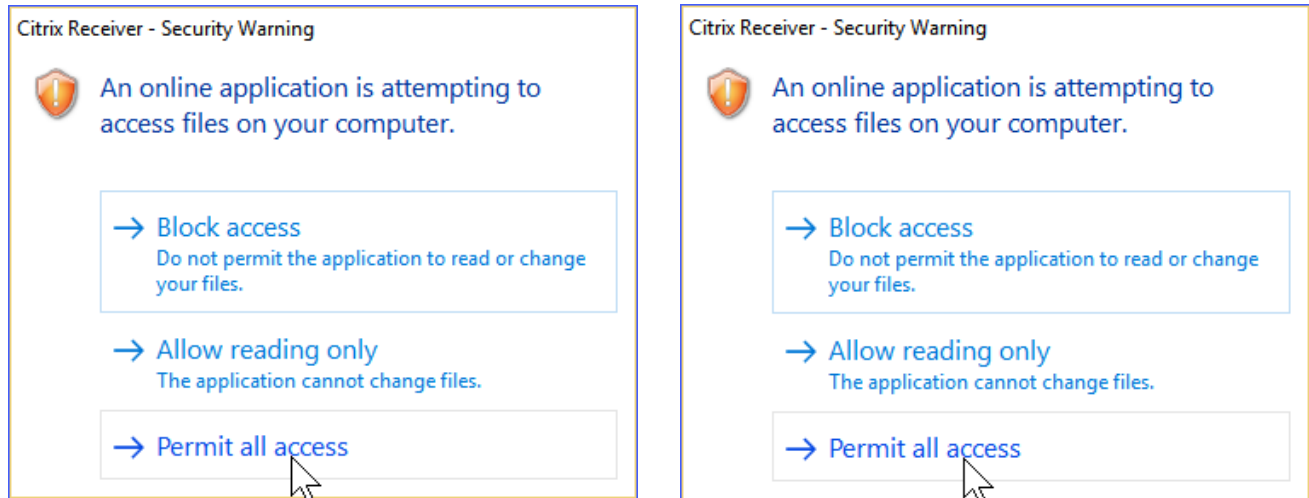


- Click anywhere on the green Citrix Receiver desktop to close the drawers and view the desktop environment.

The figure above is generic for training purposes. Your Citrix Receiver desktop environment will have the icon or icons and solution names unique to your company. The next and every subsequent time you open Citrix Receiver you will only have to single-click the solution icon you want to launch. In fact, by default, Citrix Receiver now places an application shortcut directly on your desktop. You can also use that icon to start your hosted application. One click, right from your Windows desktop.

Security Warning

Depending on your network and browser security options, you may see a security warning dialog box when you click the icon to open your hosted application. You may see these dialog boxes regardless of whether or not you click the checkbox for, “Do not ask me again for this site.”



Windows Edge security warning prompts...

DOCUMENT ATTACHMENT & DOWNLOAD ADVISORY

If you want to be able to attach items such as photos or documents and save items such as PDF reports, you will have to select the “Permit use” option.

NOTE: During startup; if you depress the enter key to dismiss this dialog box – the default value is BLOCK ACCESS, which is fine. However, if you want to attach or save you will have to configure session security to permit use.

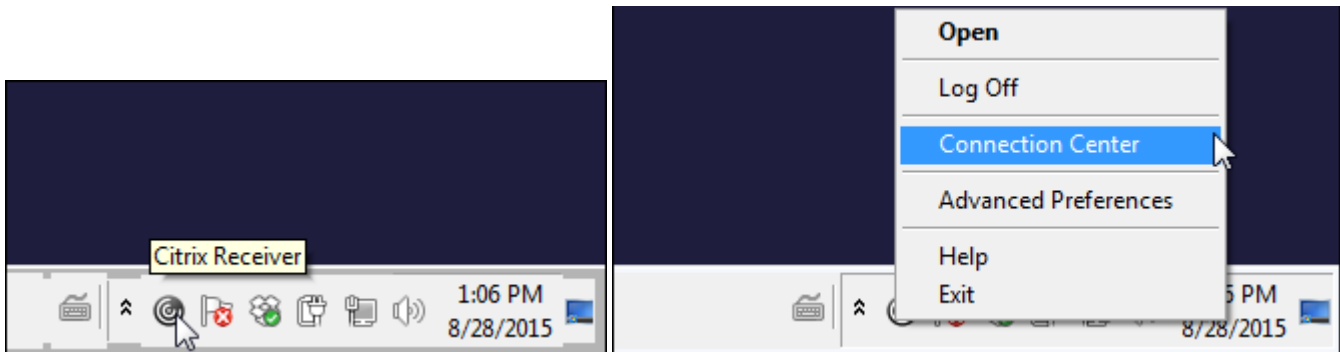
To configure session security and permit use after Block Access has been selected proceed to the next section: Configuring Session Security.

Session Security

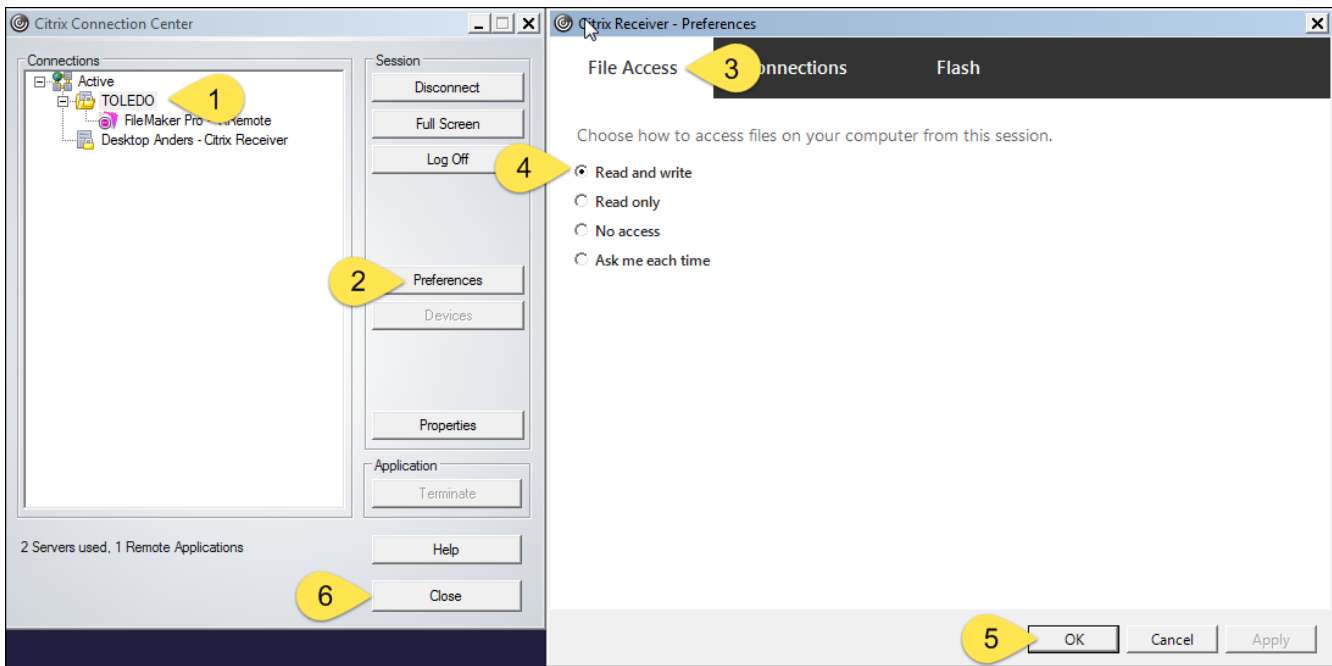
Performo, Projecto and REportfolio allow users to upload documents such as leases, photos and invoices. Additionally, Wizard Software solutions allow users to download or export copies of previously attached items as well as Excel and PDF reports.

To enable document upload and download, the Citrix Receiver application must be permitted access to hard drives and directories connected to your local computer.

Accessing the Citrix Connection Center (Windows 7 Operating System)



- Right-click on the Citrix Receiver icon in the Windows Notification area.
- Choose the Connection Center option



1. Click to select the Citrix server that you are currently connected to
2. Click Preferences
3. Click the File Access tab
4. Click Read and write to enable document / item upload and download
5. Click OK to accept settings and close the Preferences tab
6. Click the Close button to close the Citrix Connection Center

Essential Note:

Note that clicking the radio button for, “Read and write,” does not guarantee that you will not see the dialog boxes shown in the Security Warning section of this user guide which are wholly dependent upon network and browser security settings.

Save As

Once you have decided to download a report, or if you want to upload a document, photo or other item to a lease, project or work order; you will have to navigate this dialog box, or one very much like it.

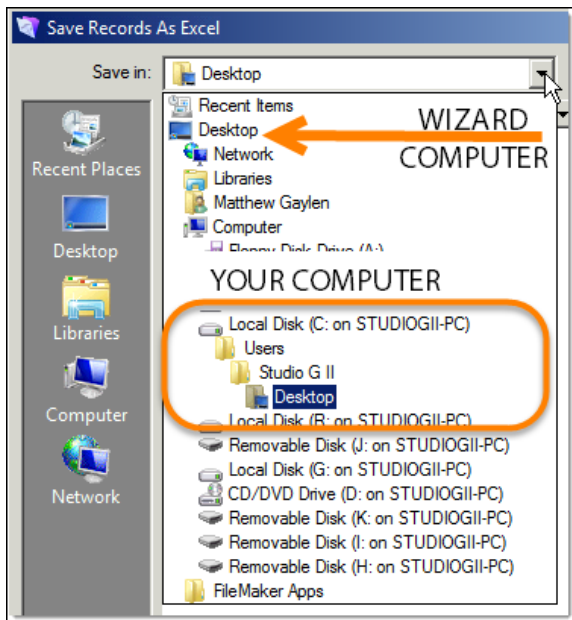
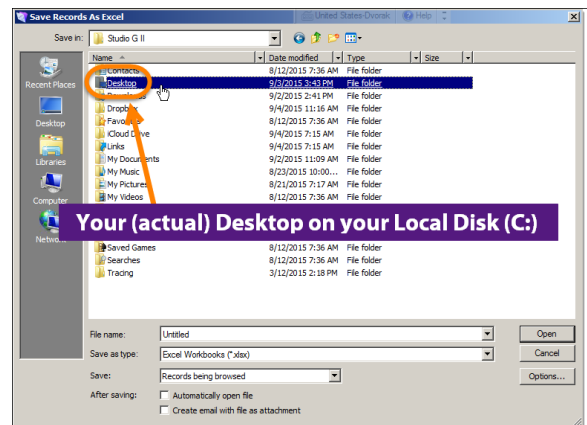
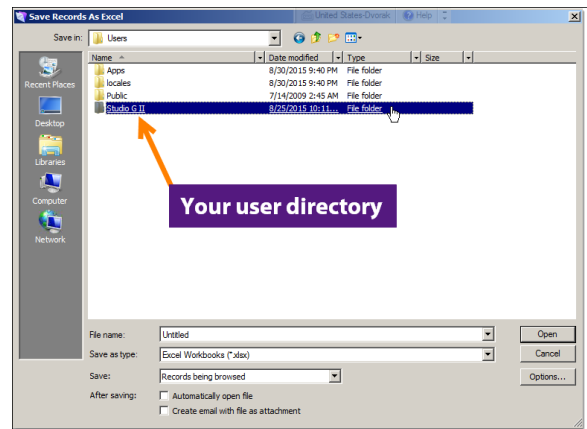
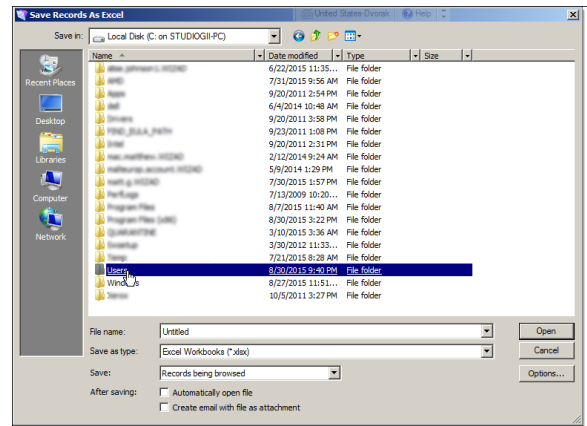
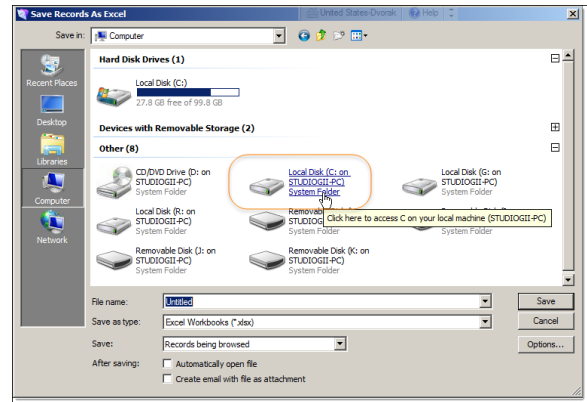
The main thing to remember is that if we are hosting your solution for you, then you are actually using a virtual computer located on a server at our Chicago-based hosting facility. What this means is that the Local Disk (C:) is located on that virtual computer at the hosting facility.

Meanwhile, all of your documents are located on your Local Disk (C:) which refers to the machine on your desk.

- Click the Computer icon on the left side of the dialog box to display all of the electronic media attached to your computer.
- If the hard drive you need to access is not displayed on the right side of the dialog box, refer to the previous section of this document: *Configuring Session Security*.
- Find and double-click the icon that corresponds to your computer in the section marked **OTHER** on the right side of the dialog box.

The dialog box will display all of the items accessible from that directory.

- Find and double-click the **USERS** directory
- Find and double-click the **DESKTOP** directory
- Click the **OPEN** or **SAVE** option to upload or download as needed.



Use Internet Explorer

- Browsers other than Internet Explorer are not supported and results may vary and be inconsistent.
- Access to hosted solutions requires installation of Citrix Receiver (*pages 3-9*).



User name and password

Connect to your Wizard Software Solutions hosted application at <https://login.wizardsoftware.net> – save this link as a favorite so you don't have to remember it. The link also appears at the top of our homepage located at <http://wizardsoftware.net>. Some users create a shortcut by dragging the URL from their browser to their desktop. Important Note: You received a Password Reset Token which is used only for the purposes of creating a real password. The first time you log in, you will use this reset token to create a password that you will use for the next 60 days.

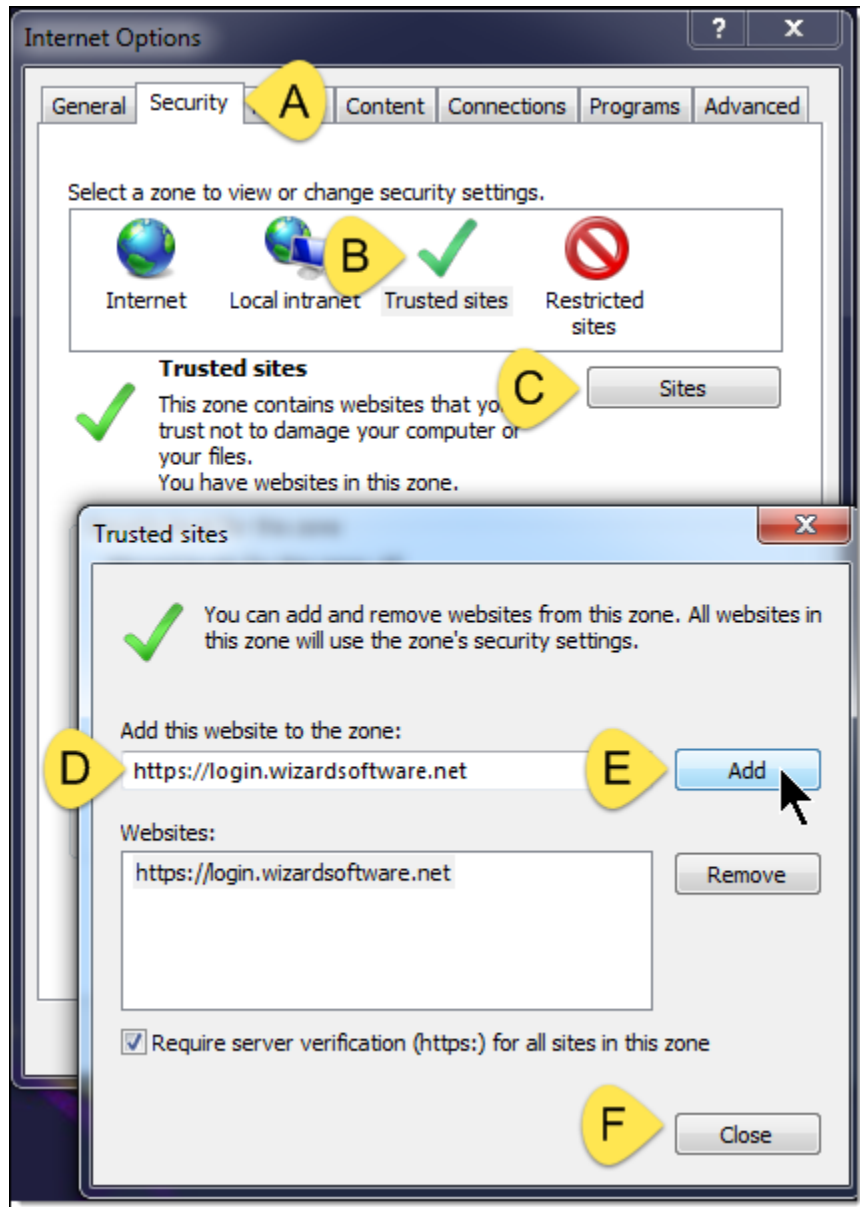
Password Guidelines

- Passwords must be seven (7) characters or more.
- Upper case letters, numbers or special characters may be used.
- You may not recycle your previous ten (10) passwords.
- Passwords expire every 60 days.

Internet Options

Company policy may require your IT department to assist you with the process of adding the hosted application domain to the trusted sites zone.

- Internet Explorer is supported. To begin, please open Internet Explorer.
- Navigate to <https://login.wizardsoftware.net>
- On the Internet Explorer Command bar, select Tools>Internet Options.



- Click the Security tab to view security options.
- Click the Trusted sites icon next.
- Click the Sites button to view the list of trusted sites.
- Enter “https://login.wizardsoftware.net” into the field called, “Add this website to the zone.”
- Click the Add button.
- Click the Close button.
- Click OK to close the Internet Options window.

Password Reset

- Navigate to <https://login.wizardsoftware.net>
 - You must use Internet Explorer or Windows 10 Edge
 - No other browser is supported.
 - Do not attempt to use the Citrix Receiver desktop application to reset your password.
- Credentials – Enter your Wizard Software Solutions Citrix username
 - FirstName.LastName (in most cases)
 - Usernames are not case sensitive.
 - Do not preface your username with the WizAD domain name when accessing from a web browser.
- Paste the password provided into the field on the webpage...
- Click okay to proceed.
- When successful, another webpage opens and you must paste in that same password again to confirm that you are authorized to proceed.
- The last step is to create the password you will use for the next 60 days [see *Password Guidelines* below]



Change Password

Passwords must be 7 charactrers or longer and you may not repeat the last 10 passwords.

Password: **Paste it in again.**

Create a password:

Confirm password:

Password Guidelines

- Passwords must be seven (7) characters or more.
- Upper case letters, numbers or special characters may be used.
- You may not recycle your previous ten (10) passwords.
- Passwords expire every 90 days.

Citrix Receiver Desktop

If you choose to use the Citrix Desktop environment after you reset your password, you will be prompted to log in to your account the next time you attempt to access your hosted solution.

- Enter your user name with the following syntax
- [WizAD\User.Name].
- You must type the Active Directory domain name and the backslash (the \ is the one above the Enter key on most keyboards)
- If you do not enter the Active Directory domain name with the backslash prior to entering your user name, then Citrix will display a dialog box that indicates your credentials are invalid.
- If this occurs, do not reset your password again; simply use the Active Directory domain name and the backslash with your user name – wizad\User.Name
- Click the Remember Password checkbox if desired
- If you do not click the Remember Password checkbox, then you will have to follow these directions every time you login to your hosted application

Troubleshooting

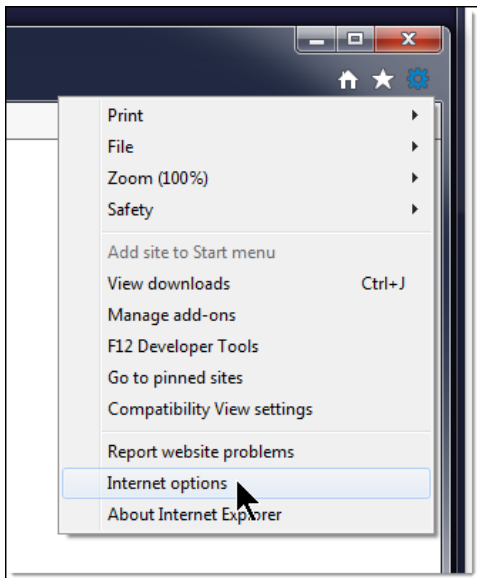
I clicked the icon and nothing happened

Resolve this issue by installing the current version of Citrix Receiver.

Reset Internet Explorer

If Internet Explorer is not your default browser, some plugins may not behave as expected and you may benefit from resetting Internet Explorer. You must only do this after consulting and conferring with your IT department and bureau of network operations.

- Navigate to the Internet Explorer Tools icon/menu and choose Internet options...



- Click the Advanced Tab to view advanced options
- Click the Reset... button at the bottom of the dialog box
- Click the Reset button on the Reset Internet Explorer Settings pop-up window...

1. You must consult with your IT department or bureau of network operations before attempting to perform this procedure.
 2. You must restart your computer for these changes to take effect.
- <http://windows.microsoft.com/en-us/internet-explorer/reset-ie-settings#ie=ie-11-win-7>
This link provides some further details about the reset procedure.

