



Investment Management System

Connectivity Guide

1. Introduction

This document details the necessary steps and procedures required for organisations to access the Investment Management System (IMS). Organisations accessing IMS will fall into one of the following categories:

Registered Providers – Organisations who are registered with the HE Regulator. Provider codes follow the format **A# # # #, C# # # #, L# # # #, LH# # # #, ##AA**

Unregistered Providers – Organisations who are not registered. Organisation codes follow the format **NP# # # #**

Local Authorities – some Local Authorities have read only access to view schemes within their local authority area. Bids for funding are not allowed using this log-in. A three-digit numerical code is provided for each local authority.

2. Client Requirements

The following is required for connection to the IMS system:

- Internet connectivity (specifically <https://secure.homesengland.org.uk> on port 443)
- Currently supported browser i.e. Edge, Chrome, Firefox
- Citrix Client

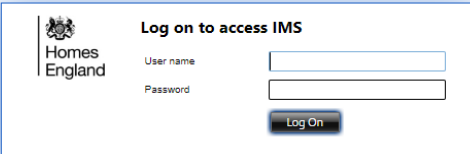
Citrix Client

New users of IMS will need to install a Citrix client. If your organisation already uses other Citrix applications, then you may already have a Citrix client installed on your computer.

Whilst you don't have to install the latest version of the Citrix client before accessing IMS it's recommended to install the latest version for improvements and security updates.

To install the Citrix client from the homepage

1. Open <https://secure.homesengland.org.uk> and click on **Citrix.com**



User guidance and other general information is available on our main [website](#)

IMS Citrix Connectivity guidance is available [here](#)

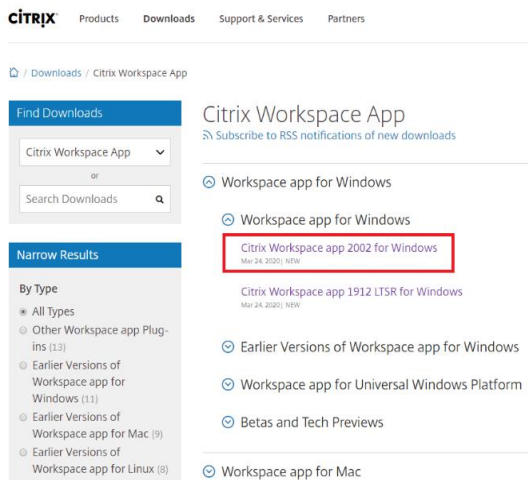
For IMS Support, please contact the Homes England Service Desk on 01908 353604 or by email servicedesk@homesengland.gov.uk

If you are a provider with programmes within the London area please note IMS has now been replaced with the OPS system. For further information please contact the GLA by email ops@london.gov.uk

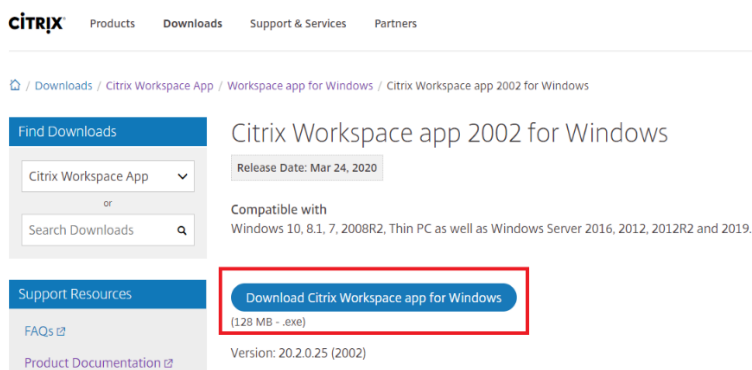
If you require a Citrix client you can download the latest version from [Citrix.com](https://www.citrix.com)

This is a private network. Access is only permitted to authorised users. Unauthorised access is strictly forbidden. Access to this site is governed by: Homes England's Information Security Policy and supporting policies, GSI Code of Connection and UK legislation, including but not limited to: Computer Misuse Act 1990 and the Data Protection Act 1998.

2. Click on **Citrix Workspace app 20xx for Windows** (note: this number will change periodically when Citrix release new versions). *Further down the page there is a link for a “Workspace app for Mac” for any Apple Mac users to download and install the latest version.*

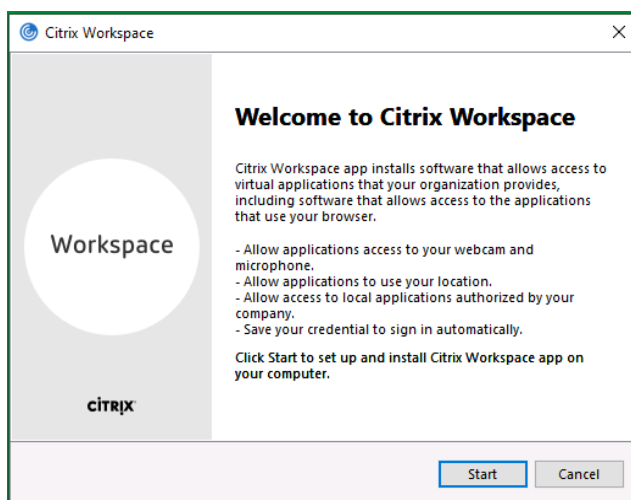


3. Click on **Download Citrix Workspace app for Windows** which will download a file named **CitrixWorkspaceApp.exe**

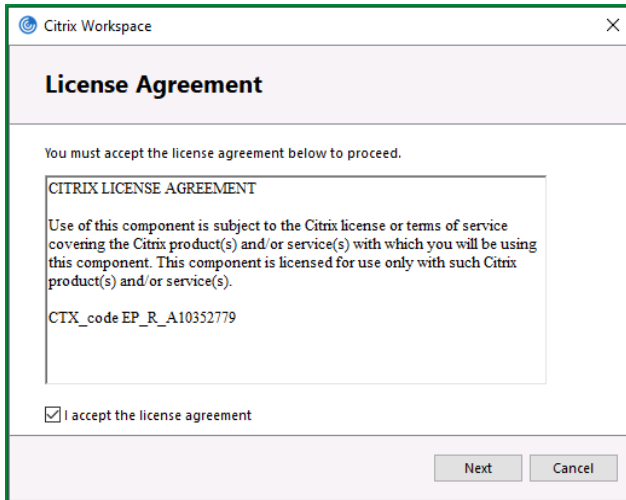


4. Once CitrixWorkspaceApp.exe has downloaded double click to install it. Follow the wizard as per the steps below –

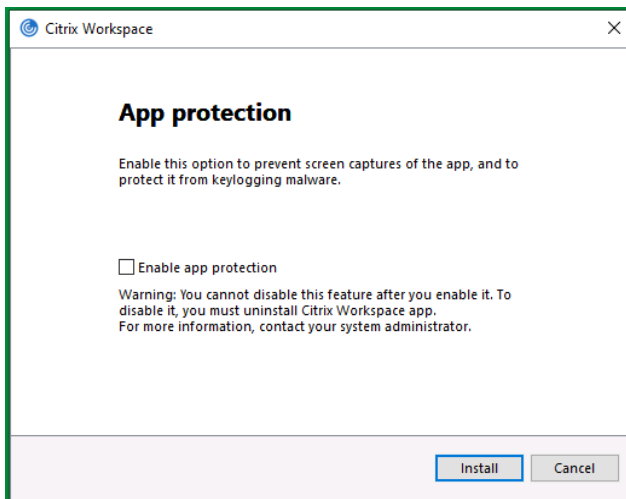
Click Start:



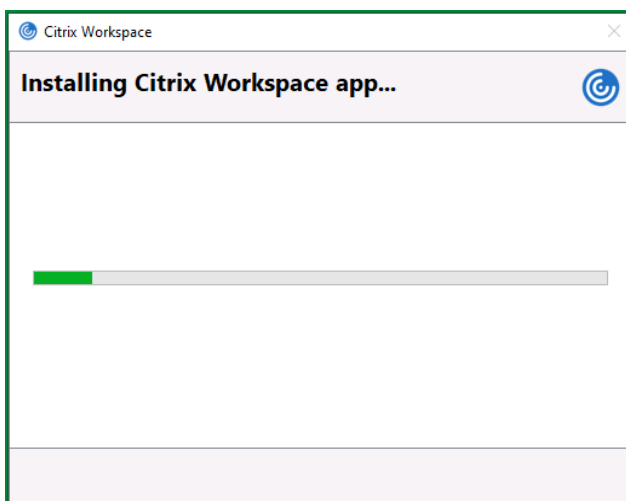
Tick “I accept the license agreement” then Next:



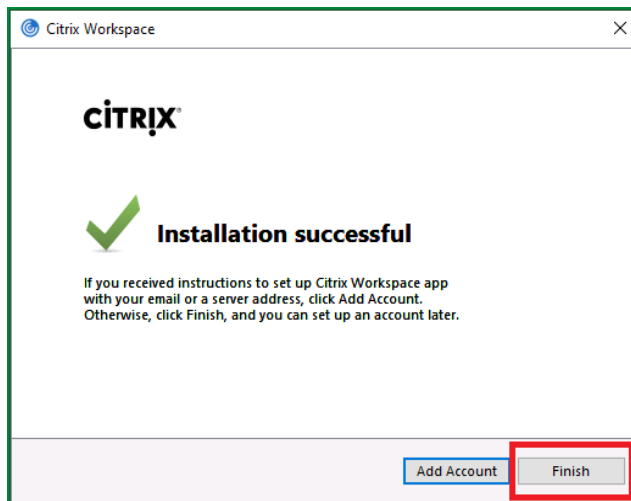
Click on Install (App protection is not required so you don't need to enable it):



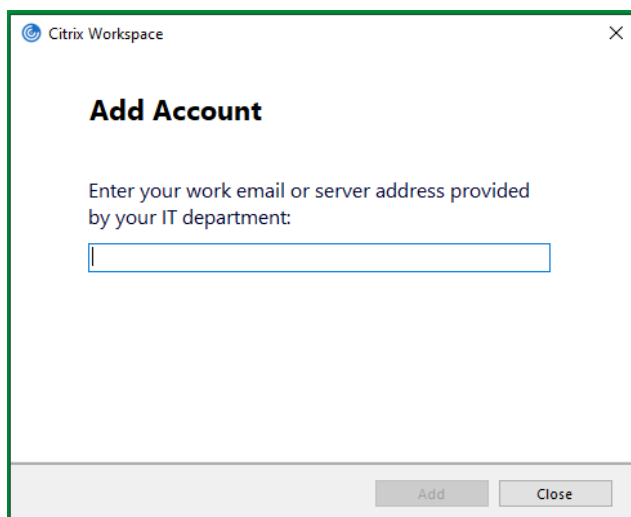
It will go through the installation process:



Click on **Finish** rather than Add Account:



If you do click on Add Account, you'll get the following box – click on **Close** as we don't use this feature:



Note: you can alternatively save the installation file if you wish to deploy the Citrix client using your own software management system.

If you are accessing IMS from a tablet or mobile device, you can install the Citrix Workspace App from the relevant App Store (i.e. Google Play Store or Apple Store) by searching for "Citrix Workspace".

3. Connectivity Details

Overview

IMS uses Citrix Gateway which simplifies the connectivity requirements. The website <https://secure.homesengland.org.uk> is accessed on port 443 which is the default SSL port for secure connections (HTTPS). The IMS applications are then “tunneled” through to the same address on port 443 using a secure connection from the Citrix client (ICA/SSL), with the Citrix client configured to automatically use your web browser’s connection settings.

In most cases the only requirement is that access to the above address is allowed on port 443. Because this is the default HTTPS port, it is envisaged that most organisations will already have this open.

Note in reference to ICA/SSL: HTTPS is HTTP wrapped in SSL (the encryption protocol) and is typically delivered over port 443. As port 443 is the official registered port for HTTPS any traffic over port 443 is assumed to be HTTPS by firewalls and proxy servers. ICA/SSL is a Citrix-proprietary protocol used for secure communications between Citrix clients and servers, on port 443. Because SSL is the encryption protocol, firewalls, routers, proxies and so on between the client and the server cannot “see” what is inside the protocol. Therefore, firewalls and proxies do not really differentiate between ICA/SSL and HTTPS, and typically try to treat ICA/SSL as HTTPS.

Connection process

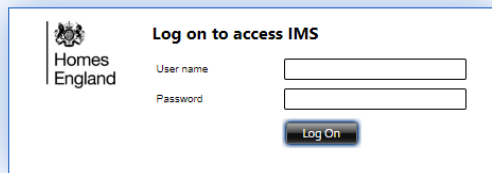
The following is the process which occurs when connecting to the IMS applications:

1. The user connects to the website <https://secure.homesengland.org.uk> and logs in. This should be accessible in most cases as it’s the default HTTPS port and the Fully Qualified Domain Name is resolvable by any external DNS, like any other external website.
2. The user launches an application and a Citrix ICA file is automatically generated and passed to the Citrix client. The ICA file contains entries instructing the client to connect to <https://secure.homesengland.org.uk> on port 443 using the client’s default web browser settings.
3. The client computer will try to resolve “secure.homesengland.org.uk” to an IP address before attempting to connect using the client computer’s default web browser connection settings.
4. If the default web browser connection settings allow direct internet access, you should not experience any problems connecting to the IMS applications.
5. If the default web browser connection settings route internet traffic through a proxy server or firewall, most proxy servers and firewalls should allow the connection as they will try to treat ICA/SSL the same as HTTPS traffic. However, in some cases there may be issues caused by proxy servers/firewalls preventing or interrupting ICA/SSL traffic due to the way they are configured to handle HTTPS traffic.

If you are having connection problems, please see Troubleshooting on page 14.

4. IMS Application Access

1. On your computer open <https://secure.homesengland.org.uk> as below.



User guidance and other general information is available on our main [website](#)

IMS Citrix Connectivity guidance is available [here](#)

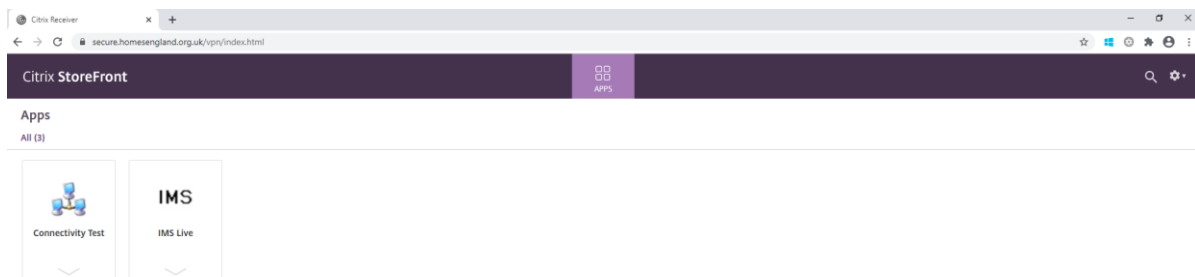
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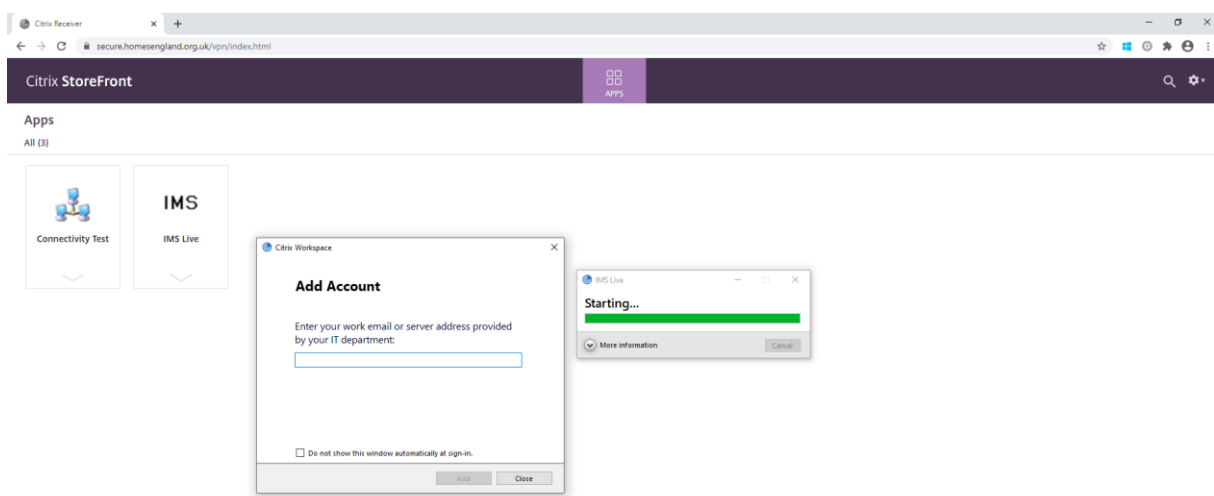
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2. Enter your Citrix username and password supplied by Homes England, which will then display the following page.

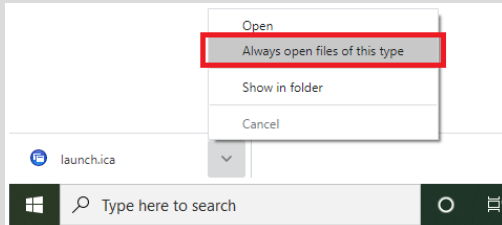


3. Click on the icon to launch **IMS Live**. The following page will be displayed as it connects to the application using the Citrix Workspace app (and may also display a prompt for Add Account).

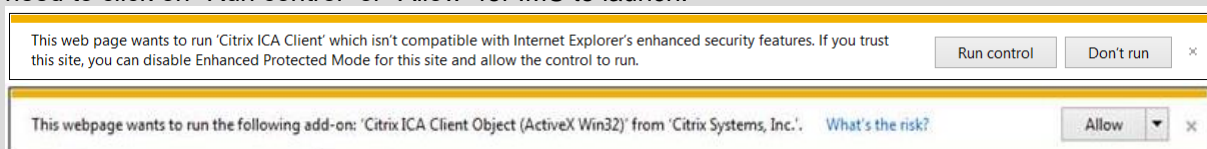


Notes

1. Depending which browser you are using it might download the **launch.ica** file but not automatically open the application – the image below is from Chrome where it has downloaded the file but needs you to click on **Open** or **Always open files of this type** to run IMS.

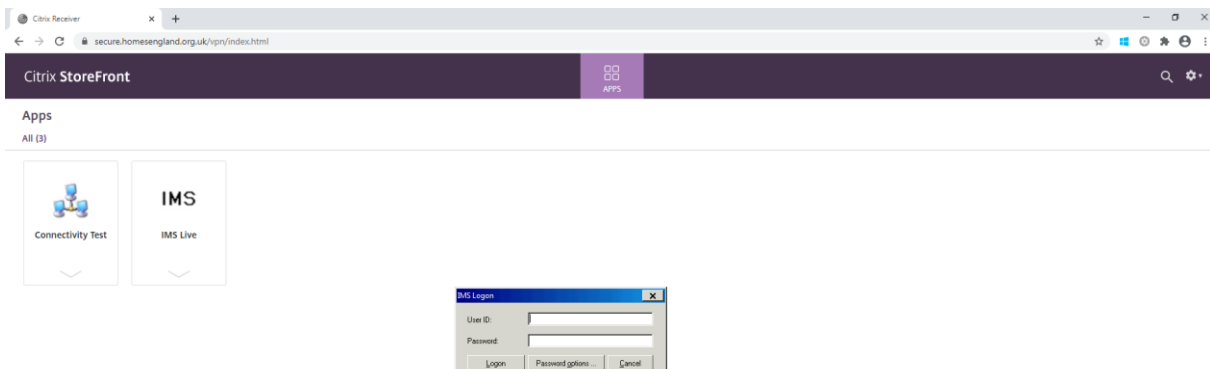


2. If using Internet Explorer, you might see an additional prompt as per the examples below – you'll need to click on “Run control” or “Allow” for IMS to launch.

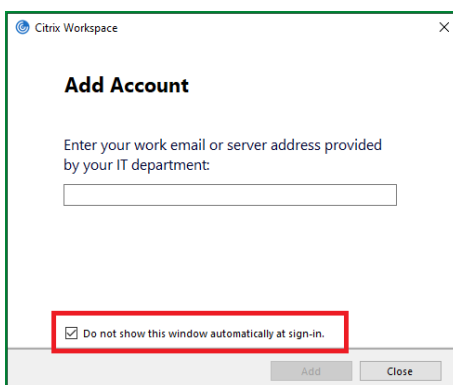


3. Depending on your computer configuration you might have personal firewall software that could also prompt you to allow access when launching the IMS application.

4. When the application has been launched, enter your IMS User ID and Password.



5. If the Add Account prompt is displayed – tick the box **Do not show this window automatically at sign-in** to prevent this popping up on every login, then click Close.



Accessing from a tablet or mobile device (Apple or Android)

1. Install "Citrix Workspace" from the App Store on the device.
2. Open the Citrix Workspace app. There should be a "+" button to add an account – click on this.
3. At the prompt to enter email address or Store URL type in <https://secure.homesengland.org.uk> then there should be an option underneath **Add account type as Web Interface** – this needs enabling as it's a web Interface only site.
4. Click Continue which will display the IMS login screen in the app (this will also save the connection for future use).
5. Enter your Citrix ID and password which will take you to the screen with the Connectivity Test and IMS Live icons.
6. Click on IMS Live - this will launch IMS in the Citrix Workspace app itself.
7. With it being on a tablet/mobile device it will show you the touchscreen Gestures at launch for using within the app (change to keyboard/pointer/zoom etc.) – if you click anywhere on the blank screen it will remove the Gestures box and you'll be able to see the IMS Login box.
8. Login to IMS with your IMS User ID and password.

There should be a drop down arrow at the top of the screen where you can also change to keyboard, pointer, zoom and access the Gestures menu etc.

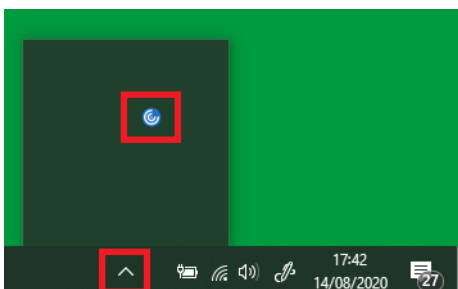
5. High DPI settings

Depending on your individual display configuration you may need to change the Citrix Workspace App's default High DPI settings – single displays with high resolution and multiple displays with mixed screen resolutions and scaling will require a change to the setting for the application to display optimally.

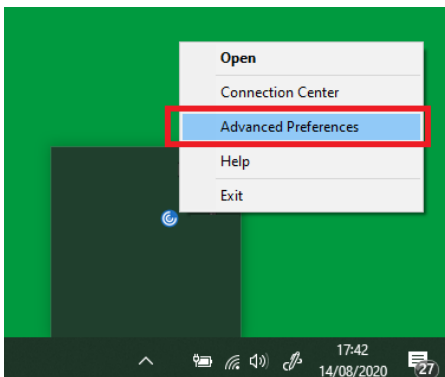
In some cases, you'll see a blank box instead of the IMS application or are not able to click onto menus and enter text, or the application will display very small text – these can be resolved by following the steps below to allow Citrix to handle the scaling.

If you need to change the High DPI settings, please do the following steps:

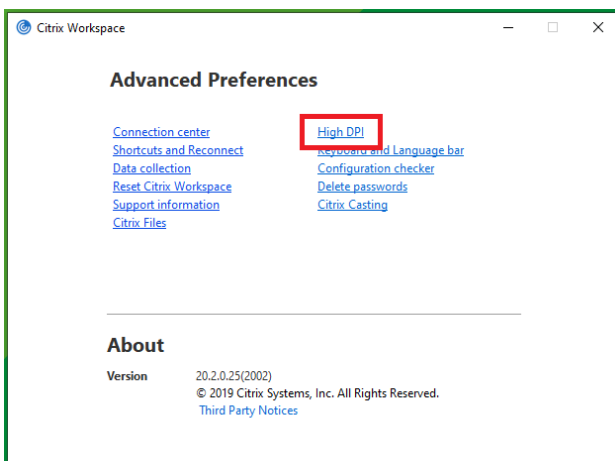
1. With the IMS application open, click on the Taskbar as below and right click on the Citrix icon (blue and white circle).



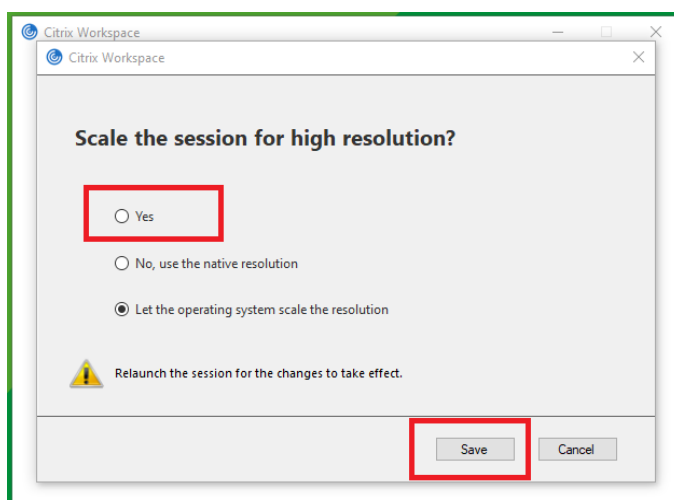
2. From the menu click on **Advanced Preferences**.



3. From the Advanced Preferences window that is displayed click on **High DPI**.



4. The default setting is “No, use the native resolution” – click on **Yes** to change the option to allow the Citrix client to handle the scaling then click on **Save** (you can then close the Advanced Preferences window). The new setting will apply next time you launch an application.

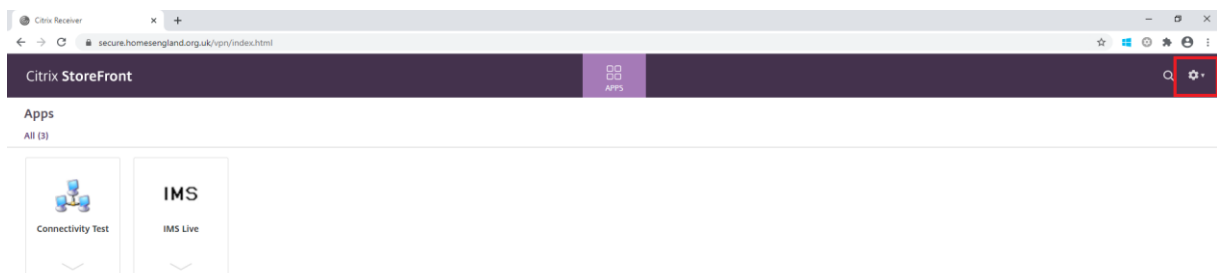


6. Changing your Citrix password

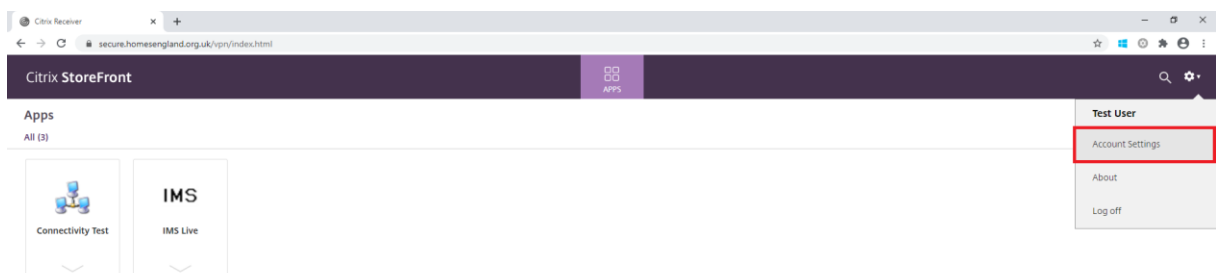
You will be prompted to change your Citrix password 7 days before it expires. You can also change it anytime as described below.

Note: your Citrix password requires changing every 60 days, it must be a minimum of 8 characters in length and contain at least three of the following: upper case, lower case, number, special character. You cannot reuse the last 5 passwords.

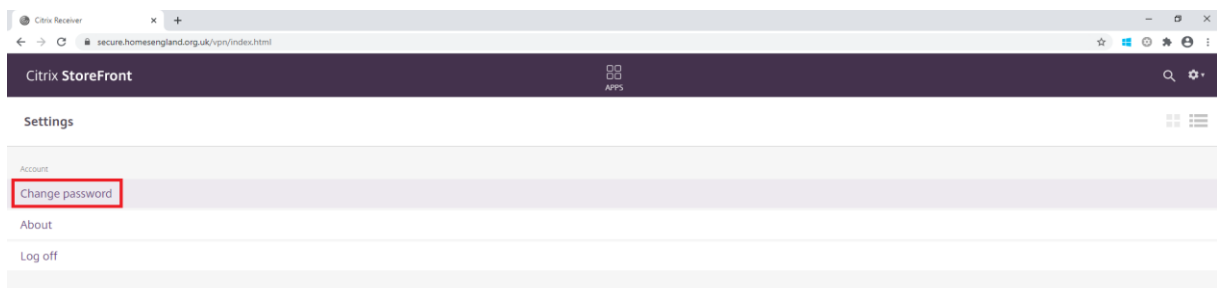
1. In the top right-hand corner of the website click on the **Settings** link (*in red below*).



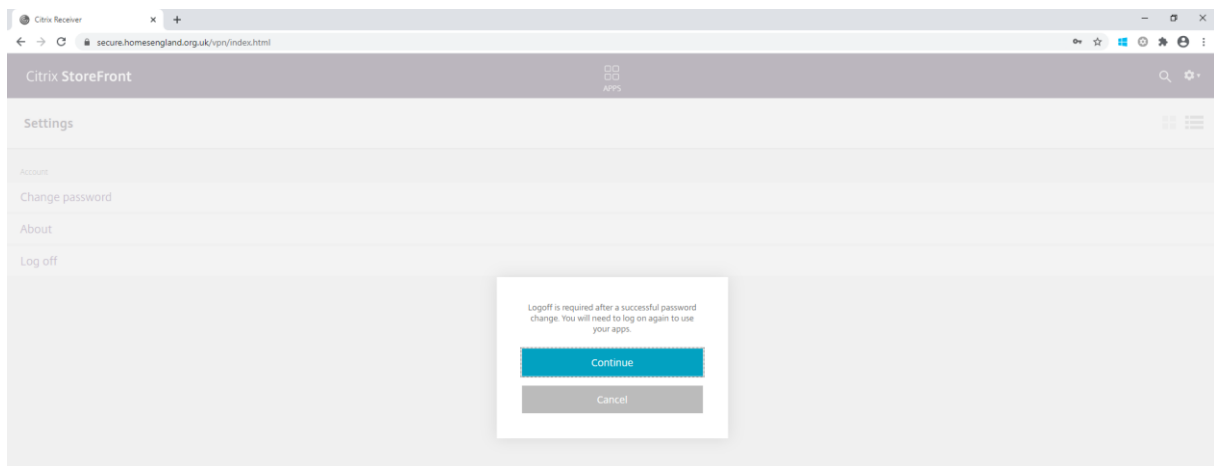
2. Click on **Account Settings**.



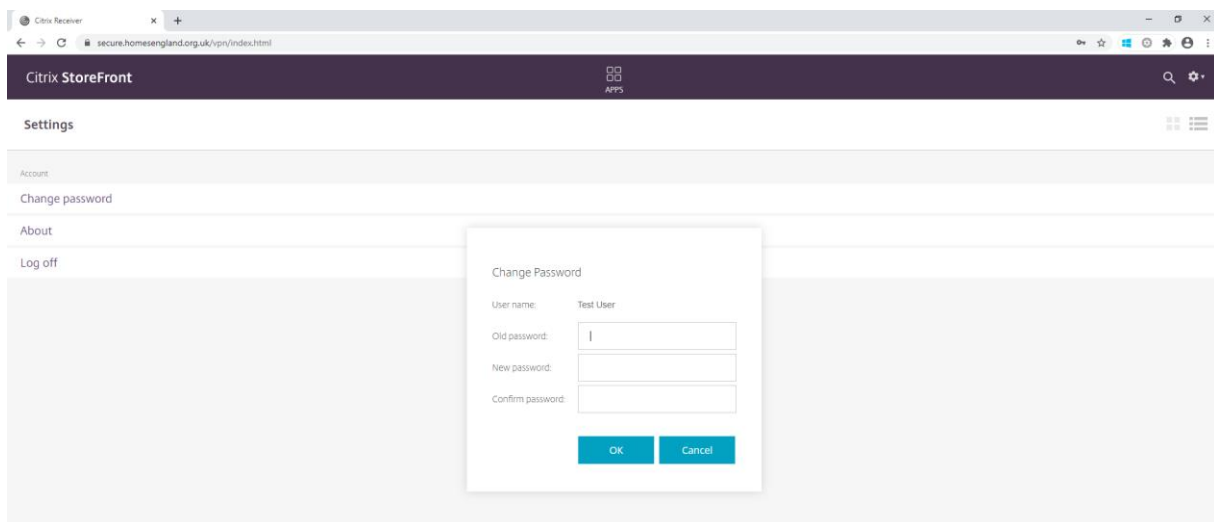
3. Click on the **Change Password**.



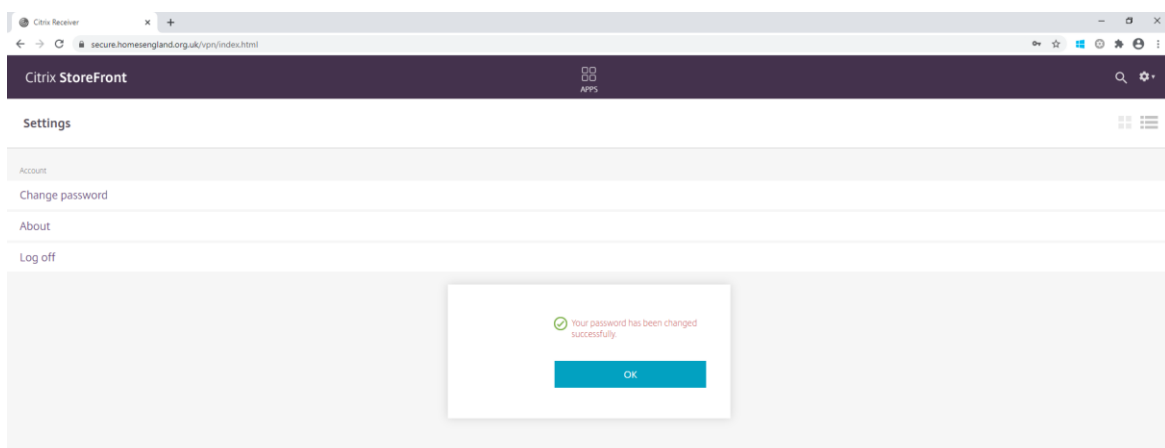
4. Click **Continue** to the warning that you'll need to logoff the website and login again after you have changed your password.



5. The Change Password box will now be displayed. Enter your old and new passwords as prompted then click **OK**.



6. Click **OK** to the confirmation that your password has been changed.



7. You'll be automatically logged off the website after 30 seconds or you can click the **Complete Logoff** button – you'll then need to close the browser and login again with your new password.

7. Printing from IMS

When you login to the IMS application, only your default printer will be mapped. If you need to print to a different printer, you will need to change your default printer before logging into the application.

The following workaround will help with some of the known issues such as printing dots where the text should be, reversed text, hashes instead of numbers etc.

Print to a PDF Writer

If you have a PDF Writer already installed on your computer, you will need to set it as your default printer when you print reports from IMS.

When prompted, select the location and filename of where you want to save the PDF file. Once it has saved it may automatically open the report, if not, open the file from where you saved it. If the report looks OK, you can then print this as a normal printout.

However, some IMS reports may still have the text mirrored. If this occurs, you will need to make a change to the PDF Writer properties as below.

Note: to do this, you may have to ask your IT department to help as it may require administration privileges.

1. Open Settings > Printers and Scanners.
2. Click on the PDF Writer then Manage and select **Printer Properties**.
3. Click on the **Advanced** tab and un-tick the option **Enable advanced printing features** then click OK.

If you do not have a PDF Writer installed, you can use this one which is free:
<http://www.pdfforge.org/pdfcreator/download>.

8. Troubleshooting

Potential connection problems

The following are potential client-side issues which can cause most connection problems. For each of the issues below, a variety of error messages could be displayed. If the solutions don't resolve the issue, or you would like any help, please contact the Homes England Service Desk on 01908 353604 or email servicedesk@homesengland.gov.uk.

1. Certain proxy/firewall configurations may not allow or drop ICA/SSL traffic. You may see error messages such as “There is no Citrix SSL server configured on the specified address” or “The Citrix SSL server you have selected is not accepting connections”.

Solution: If the Citrix client connection fails, verify that SSL tunneling is allowed for this address. ICA/SSL traffic requires a single continuous SSL connection between the client and server. For example: proxy servers allowing the CONNECT method (SSL tunneling) and firewalls in forwarding mode ensure that connections are opened directly between the client and the Citrix Gateway. Some proxy servers allow SSL tunneling by default, but some require it enabling. Similarly, verify that no restrictions are placed on ICA/SSL traffic such as time-outs on sessions, including idle, absolute, and data traffic time-outs. Alternatively, allow <https://secure.homesengland.org.uk> to bypass the proxy/firewall and give direct internet access to this address.

2. The Citrix client cannot resolve the name “secure.homesengland.org.uk” even though you can access the website. This can give similar error messages to the issue above.

Solution: If you can access the website but the application fails to launch, verify that the client computer can directly resolve the address “secure.homesengland.org.uk”. This issue can occur when the client computer is not able to resolve external addresses itself, such as when a proxy server is used for internet access, and the proxy server performs all external DNS resolution.

3. Instead of launching the IMS application, you may receive a prompt to save an .ICA file even though you have the Citrix client installed.

Solution: Chrome, Edge and Firefox – unless already changed the default action will be to download the .ICA file then you can click on the downloaded file to run it – right clicking the downloaded file in the browser gives an option to “Always open files of this type” which will allow the IMS application to load automatically when you click on the IMS Live link in the future.

4. Instead of launching the IMS application, nothing happens even though you have the Citrix client installed.

Solution: Make sure the “.ICA” file type is set to open with “Citrix Connection Manager” by default (C:\Program Files (x86)\Citrix\ICA Client\wfcrun32.exe). In some instances the “.ICA” file type has been associated with other applications such as File Explorer so the application will fail to launch.

5. Your version of the Citrix client may contain a bug or is incompatible with more recent software. For example, some early versions of the client contain several bugs with regards to proxy/SSL connections and can cause errors preventing connection.

Solution: If possible, upgrade the Citrix client to the latest version.

6. Personal firewall software on your computer might stop the connection being made from the Citrix client.

Solution: Check any personal firewall software and allow the Citrix client access on port 443.

9. Help and Support

For IMS Support, please contact the Homes England Service Desk.

Phone: 01908 353604

Email: servicedesk@homesengland.gov.uk