

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 <u>https://secure.homesengland.org.uk</u> 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

	Homes England	Log on to ac	cess IMS	
For	User guidance and IMS -	other general infor Citrix Connectivity g	mation is available on our main <u>website</u> guidance is available <u>here</u> valand Senere Desk on 01908 353604 or by email	
are a provider v	with programmes within	servicedesk@hon	ngland Service Desk of 01908 555604 of by emain mesengland.gov.uk please note IMS has now been replaced with the O	PS system. For
	further informati	on please contact t	the GLA by email ops@london.gov.uk	,
a private netwo erned by: Home in	ork. Access is only perm es England's Information cluding but not limited	itted to authorised n Security Policy an to: Computer Misu	users. Unauthorised access is strictly forbidden. Acc ad supporting policies, GSi Code of Connection and use Act 1990 and the Data Protection Act 1998.	cess to this site UK legislation

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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**

CITRIX	Products	Downloads	Support & Services	Partners
🏠 / Downlo	ads / Citrix Wo	orkspace App /	Workspace app for Windo	ws / Citrix Workspace app 2002 for Windows
Find Dow	nloads		Citrix Works	pace app 2002 for Windows
Citrix W	orkspace App	~	Release Date: Mar 24, 2	220
	or		Compatible with	
Search [Downloads	٩	Windows 10, 8.1, 7, 200	8R2, Thin PC as well as Windows Server 2016, 2012, 2012R2 and 2019.
Support P	Resources		Download Citrix Wo	kspace app for Windows
FAQs 🖄			(128 MBexe)	
Product I	Documentatio	on 🗗	Version: 20.2.0.25 (2002	.)

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

Click Start:

litrix Workspace	×
Workspace	Welcome to Citrix Workspace Citrix Workspace app installs software that allows access to virtual applications that your organization provides, including software that allows access to the applications that use your browser. - Allow applications access to your webcam and microphone. - Allow applications to use your location. - Allow access to local applications authorized by your company. - Save your credential to sign in automatically.
CITRIX	Click Start to set up and install Citrix Workspace app on your computer.
	Start Cancel



Tick "I accept the license agreement" then Next:

🞯 Citrix Workspace	×
License Agreement	
You must accept the license agreement below to proceed. CITRIX LICENSE AGREEMENT Use of this component is subject to the Citrix license or terms of service covering the Citrix product(s) and/or service(s) with which you will be using this component. This component is licensed for use only with such Citrix product(s) and/or service(s). CTX_code EP_R_A10352779	
✓ I accept the license agreement	
Next Ca	ncel

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



It will go through the installation process:

log Citrix Workspace	×
Installing Citrix Workspace app	٢

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:

le Citrix Workspace	×
Add Account	
Enter your work email or server address provided by your IT department:	
<u> </u>	
Add Close	

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 <u>https://secure.homesengland.org.uk</u> 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 <u>https://secure.homesengland.org.uk</u> 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 <u>https://secure.homesengland.org.uk</u> 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 <u>https://secure.homesengland.org.uk</u> as below.

	Homes England	Log on to acces User name Password	is IMS	
	Urer quidance and (other general informat	ion is available on our main website	
	IMS (Citrix Connectivity guid	ance is available here	
For I	MS Support, please con	tact the Homes Englar servicedesk@homese	ld Service Desk on 01908 353604 or by england.gov.uk	email
If you are a provider v	with programmes within further informatio	n the London area plea on please contact the C	se note IMS has now been replaced wit SLA by email o<u>ps@london.gov.uk</u>	h the OPS system. For
	If you require a Citrix	client you can downlo	ad the latest version from Citrix.com	
This is a private netwo is governed by: Home in	ork. Access is only permi is England's Information cluding but not limited	tted to authorised use n Security Policy and su to: Computer Misuse A	rs. Unauthorised access is strictly forbid pporting policies, GSI Code of Connect ct 1990 and the Data Protection Act 19	den. Access to this site on and UK legislation, 98.

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

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Citrix StoreFror	nt		c	Q ¢ ∙
Apps All (3)				
Connectivity Test	IMS IMS Live			

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).

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Citrix StoreFront		APPS	۵. ۵۰
Apps AI (3) IMS Connettivity Test	Citrix Workspace X Add Account Enter your work email or server address provided by your IT department:	MS Lee	
	Do not show this window automatically at sign-in.		

<u>Notes</u>

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.

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	Always open files of this type		
	Show in folder		
	Cancel		
🖻 launch.ica	~	_	
Type here to se	0	Ħ	

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.

this site, you can disable Enhanced Protected Mode for this site and allow the control to run.	Run control	Don't ru	n	×
This webpage wants to run the following add-on: 'Citrix ICA Client Object (ActiveX Win32)' from 'Citrix Systems, Inc.'. What's the risk	7	Allow	•	×

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.

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Apps All (3)					
	IMS				
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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.

🛞 Citrix Workspace	×
Add Account	
Enter your work email or server address provided by your IT department:	
Do not show this window automatically at sign-in.	
Add 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 <u>https://secure.homesengland.org.uk</u> 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.

Citrix Works	-		×				
	Connection Shortcuts an Data collecti Reset Citrix I Support info Citrix Files	center High DPI d Reconnect asystems and Language bar on Configuration checker Vorkspace Delete passwords rmation Citrix Casting					
	About						
	Version 20.2.0.25(2002) © 2019 Citrix Systems, Inc. All Rights Reserved. Thurd Party Notices						

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.

So	cale the session for high resolution?
l r	() Yes
L .	O No, use the native resolution
	Let the operating system scale the resolution
4	Relaunch the session for the changes to take effect.

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).

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Connectivity Test	IMS Live									

2. Click on Account Settings.

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	IMS			About	
Connectivity Test	IMS Live			Log off	

3. Click on the Change Password.

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

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Settings		
	Logoff is required after a successful pastword change. You will need to log on agains to use you apps. Continue Cancel	

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

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Citrix StoreFront	ED APPS	٩ \$.
Settings		:: :=
Account		
Change password		
About		
Log off	Change Password User name: Test User Old password: New password: Confirm password: Confirm password: CK Cancel	

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

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Citrix StoreFront	88	Q 💠
Settings		:: :=
Account		
Change password		
About		
Log off		
	Tour password has been changed successfully. OK	

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: <u>http://www.pdfforge.org/pdfcreator/download</u>.

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: <u>Chrome, Edge and Firefox</u> – 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: <u>servicedesk@homesengland.gov.uk</u>