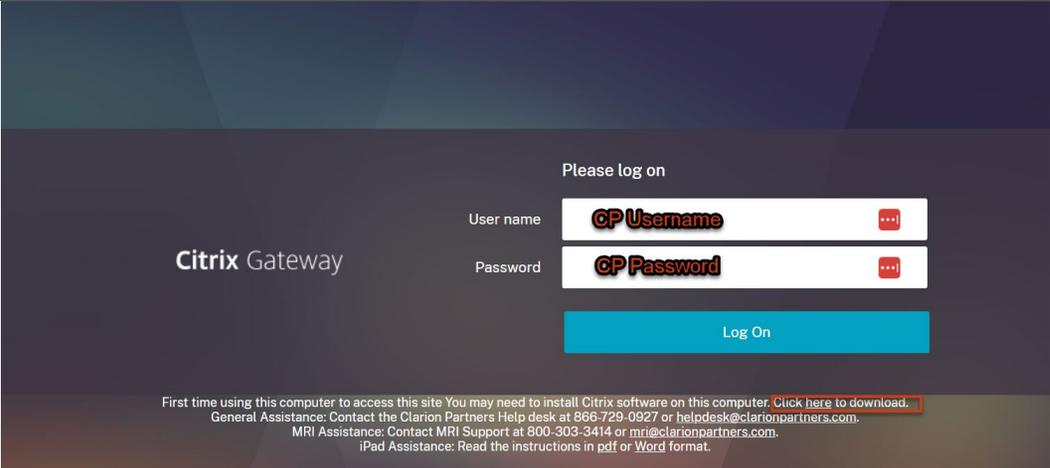


Citrix Remote Access User Guide - Personal Windows PC or MAC

Effective	This guide is effective July 2023
Purpose	This document is intended for users with a PERSONAL Windows PC or Apple MAC. This guide is NOT intended to be used from a Clarion Partners issued laptop.
Notes	<p>The Citrix environment provides a virtual desktop computer experience for users to access Clarion Partners applications from a personal Windows PC or Apple MAC.</p> <p>Citrix requires Multifactor Authentication (MFA) to complete sign on. You should already have your MFA configured. If you do not, reach out to the helpdesk for additional instructions.</p>
Clarion Partners Helpdesk	Phone Number: 1-866-729-0927 Email: Helpdesk@clarionpartners.com

Remote Website URL and Installation Information

<p>Using a web browser, navigate to: https://remote.clarionpartners.com to open the CP Remote site.</p> <p>First time access, or you need to reinstall the Citrix Workspace Software</p> <p>Click 'here' on the Login screen to begin the download of the Citrix Workspace software.</p> <p>Username: your CP username (not email address) Password: your CP password Click Logon</p>	 <p>First time using this computer to access this site You may need to install Citrix software on this computer. Click here to download. General Assistance: Contact the Clarion Partners Help desk at 866-729-0927 or helpdesk@clarionpartners.com. MRI Assistance: Contact MRI Support at 800-303-3414 or mri@clarionpartners.com. iPad Assistance: Read the instructions in pdf or Word format.</p>
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First login Client Download and installation instructions

The Citrix Download page has documentation and Software needed to help you get access to Citrix from your Windows or Apple computers.

Select an appropriate Download link to install Citrix client (see screenshot below).

[Windows](#) – Must be Windows 10 or 11

[MAC OS](#) – Must be MAC OS 10.15 or later.

To attend Zoom meetings, download the appropriate Zoom VDI Plug-In for your computer.



Citrix Client Download Page

[Instructions for Installing Citrix Workspace](#)

[Instructions for Configuring Microsoft MFA](#)

Windows Users	Windows	Download
Mac Users	Mac OS	Download

Zoom VDI Plug-In Download for Citrix

Windows Users	Windows	Download
Mac Users	Mac OS	Download

[Click here to login once you have installed the client](#)

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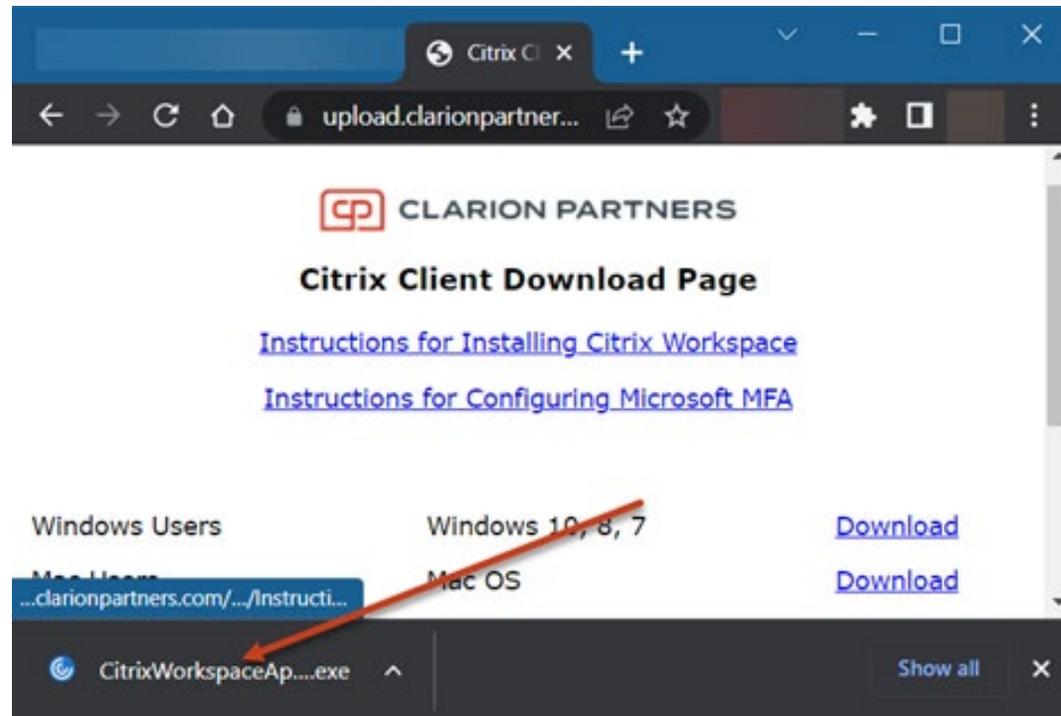
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Windows Installations

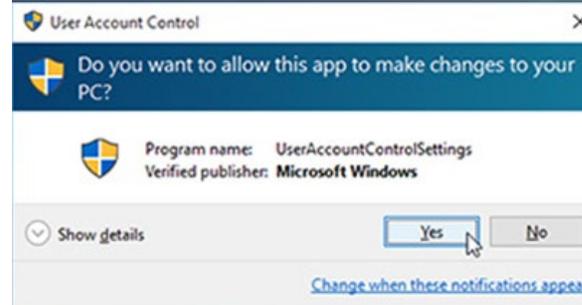
After you have selected and downloaded your [Client Type](#) from the Citrix Download page:

Double-click the file to start the installation.

*Note: The location of the download is most often found in the users' Downloads folder.

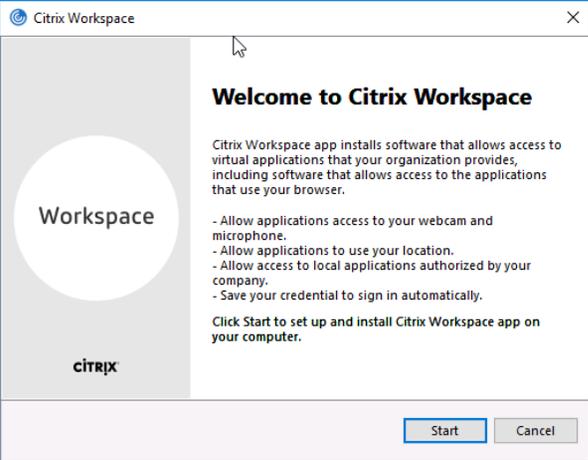
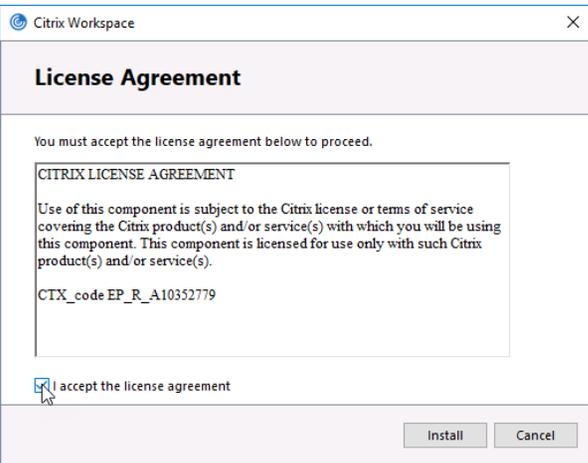


Click **'Yes'** to Windows UAC Message or **'Run'** (will vary machine to machine depending on settings of that machine)



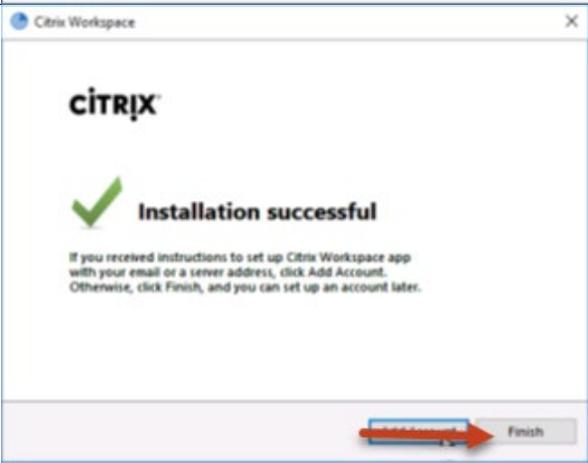
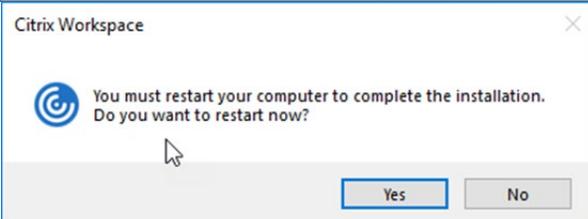
Citrix Remote Access User Installation Guide

Personal Windows PC or MAC

<p>Select 'Start'</p>	
<p>Check the box to Accept the Licensing agreement and select 'Install'</p>	

Citrix Remote Access User Installation Guide

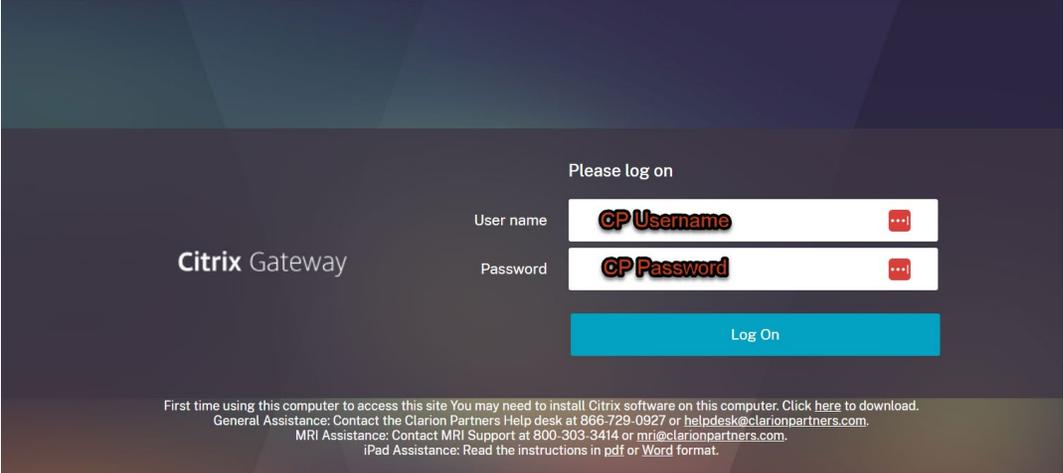
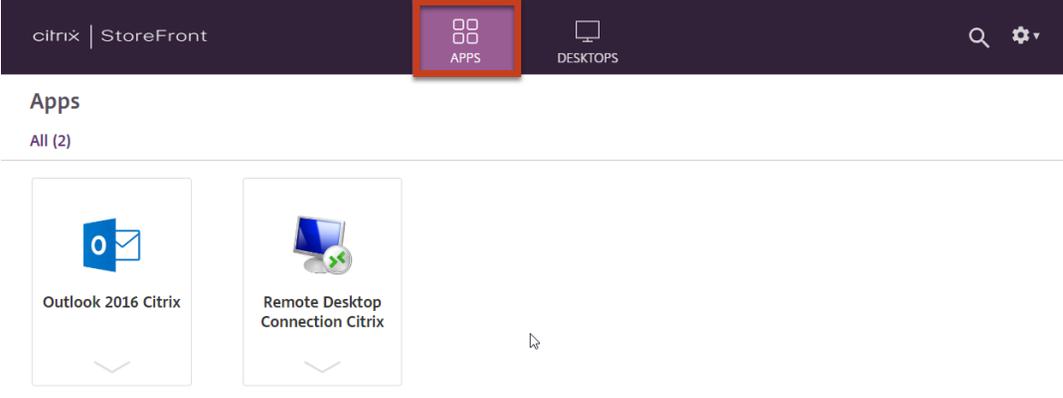
Personal Windows PC or MAC

<p>Uncheck enable app protection if to ensure Clarion Helpdesk can use remote assistance tools during support scenarios.</p>	 <p>The screenshot shows the 'App protection' settings window in Citrix Workspace. It contains a checkbox labeled 'Enable app protection' which is currently unchecked. Below the checkbox is a warning message: 'Warning: You cannot disable this feature after you enable it. To disable it, you must uninstall Citrix Workspace app. For more information, contact your system administrator.' At the bottom of the window, there are two buttons: 'Install' and 'Cancel'. A red arrow points to the 'Install' button.</p>
<p>After install completes, click 'Finish.'</p>	 <p>The screenshot shows the 'Installation successful' screen in Citrix Workspace. It features the Citrix logo at the top, a large green checkmark, and the text 'Installation successful'. Below this, there is a message: 'If you received instructions to set up Citrix Workspace app with your email or a server address, click Add Account. Otherwise, click Finish, and you can set up an account later.' At the bottom right, there is a 'Finish' button. A red arrow points to the 'Finish' button.</p>
<p>If prompted, you must restart your computer.</p> <p>If you do not have to restart your computer, restart the internet browser and return to Citrix Login Page</p>	 <p>The screenshot shows a Windows system dialog box with the title 'Citrix Workspace'. It contains a circular icon with a refresh symbol and the text: 'You must restart your computer to complete the installation. Do you want to restart now?'. At the bottom, there are two buttons: 'Yes' and 'No'. A red arrow points to the 'Yes' button.</p>

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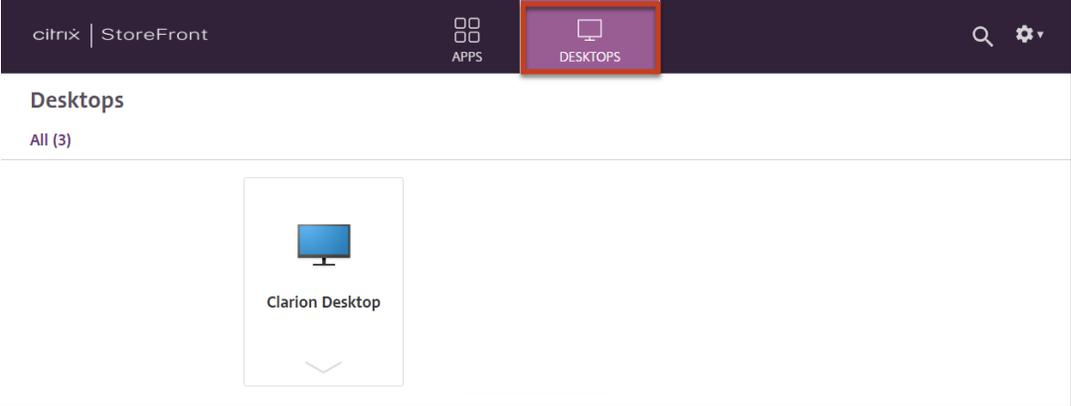
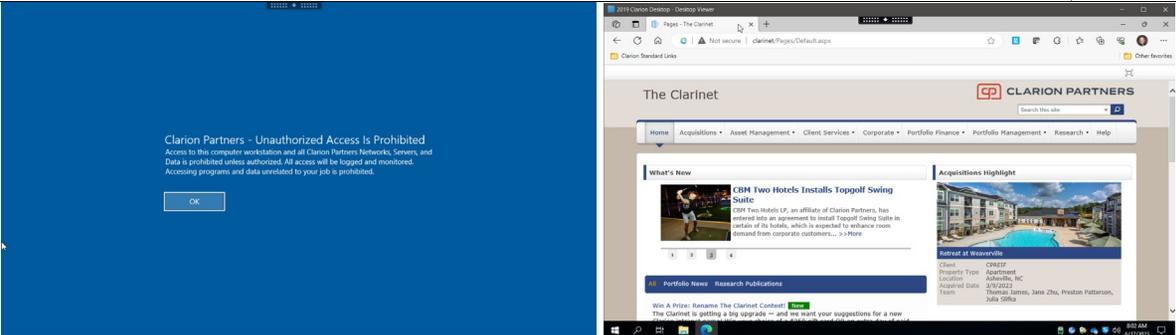
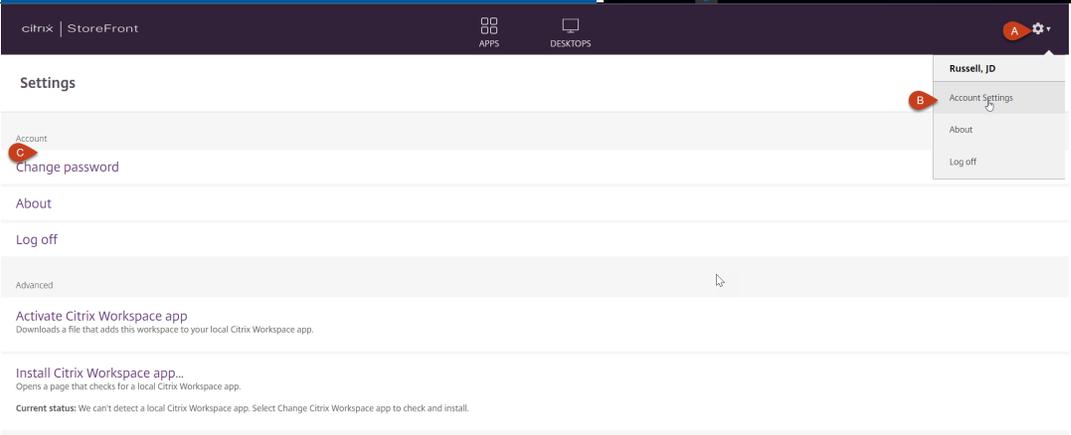
Personal Windows PC or MAC

Accessing Apps and Desktops from Windows

<p>Logging In</p> <p>Using a web browser, navigate to: https://remote.clarionpartners.com to open the CP Remote site and enter the following</p> <p>Username: your CP username (not email address) Password: your CP password</p> <p>Click Logon</p>	 <p>The screenshot shows the Citrix Gateway login interface. It features a dark blue header with the 'Citrix Gateway' logo. Below the logo, there is a 'Please log on' section with two input fields: 'User name' containing 'CP Username' and 'Password' containing 'CP Password'. A blue 'Log On' button is positioned below the password field. At the bottom of the page, there is a small text block providing instructions for first-time users and contact information for support.</p>
<p>The APPS tab provides direct access to a specific application.</p> <p>Examples include:</p> <ul style="list-style-type: none">• Outlook• Remote Desktop Connection• Argus• MRI• FAS	 <p>The screenshot displays the Citrix StoreFront interface. The top navigation bar includes the 'citrix StoreFront' logo, a search icon, and a settings icon. Two tabs are visible: 'APPS' (highlighted with a red box) and 'DESKTOPS'. Below the navigation bar, the 'Apps' section is active, showing 'All (2)' applications. Two application tiles are displayed: 'Outlook 2016 Citrix' with an Outlook icon and 'Remote Desktop Connection Citrix' with a Remote Desktop icon. Each tile has a downward-pointing chevron at the bottom.</p>

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<p>The Desktops tab provides a virtual desktop with common applications. (This is not your actual office computer)</p> <p>Click on the Clarion Desktop icon to open. You can access the files on the 'N:' drive. Common desktop applications and some special apps (Argus,MRI FAS).</p>	 <p>The screenshot shows the Citrix StoreFront interface. At the top, there are navigation tabs for 'APPS' and 'DESKTOPS', with 'DESKTOPS' highlighted in a red box. Below the navigation, the page title is 'Desktops' and it shows 'All (3)'. A single desktop icon labeled 'Clarion Desktop' is visible, with a downward arrow below it.</p>
<p>You'll see the screen first screen to the right, click 'OK' to acknowledge the logon warning and Citrix will load your desktop profile.</p> <p>**Note: If this is your first time logging in or you have not logged in for more than 30 days, this process could take a few minutes to complete.</p>	 <p>The left screenshot shows a blue logon warning dialog box with the text: 'Clarion Partners - Unauthorized Access is Prohibited. Access to this computer workstation and all Clarion Partners Networks, Servers, and Data is prohibited unless authorized. All access will be logged and monitored. Accessing programs and data unrelated to your job is prohibited.' An 'OK' button is at the bottom.</p> <p>The right screenshot shows a web browser displaying the Clarion Partners website. The browser address bar shows 'clarion.com/Default.aspx'. The website content includes a navigation menu, a 'What's New' section with a headline 'CBM Two Hotels Installs Topgolf Swing Suite', and an 'Acquisitions Highlight' section.</p>
<p>Other Settings - Change your password.</p> <p>Need to update your password remotely? Once you logged into Citrix:</p> <ol style="list-style-type: none"> Click the Gear Click Account Settings Click Change Password 	 <p>The screenshot shows the Citrix StoreFront 'Settings' page. The 'Account' section is expanded, showing options: 'change password', 'About', and 'Log off'. A red circle 'C' highlights the 'change password' link. A red circle 'A' highlights the gear icon in the top right corner of the StoreFront interface. A red circle 'B' highlights the 'Account Settings' option in the dropdown menu.</p>

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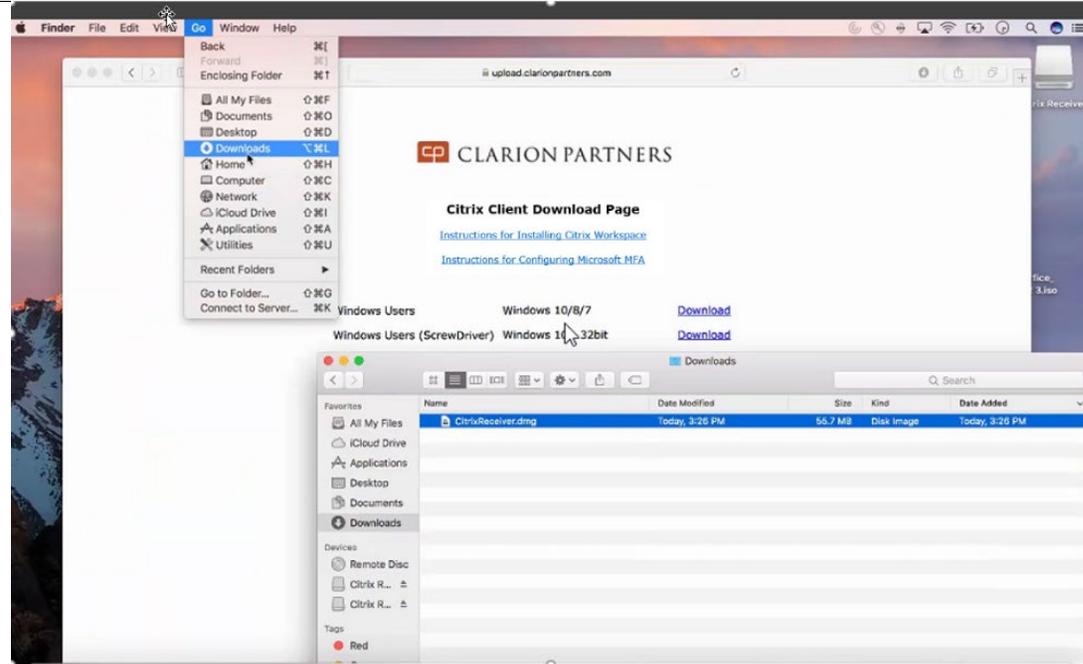
Personal Windows PC or MAC

MAC OS Installations

After you have selected and downloaded your [Client Type](#) from the Citrix Download page:

On your Mac, use Finder and Click Go to access your Downloads. In the Downloads list

Click on **CitrixWorkspace.dmg** to launch.



Double-click the Install Citrix workspace icon to begin the installation.

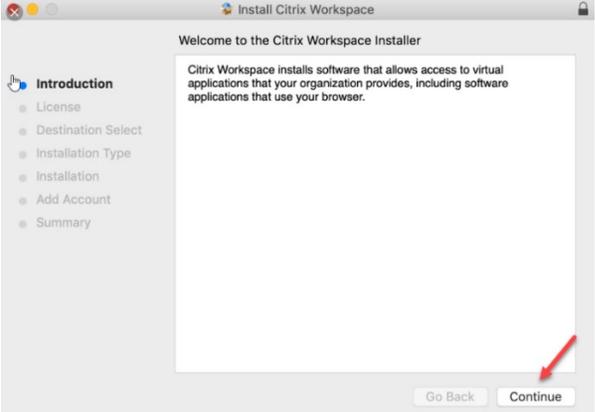
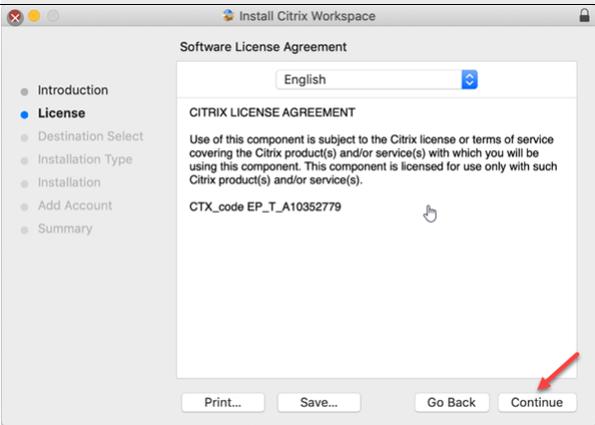
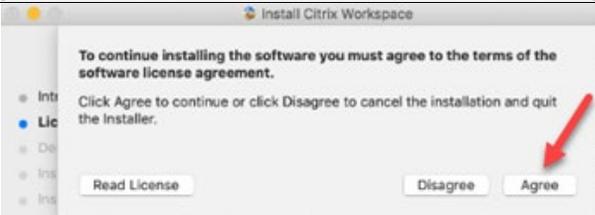


Click **Continue** to start the installation.



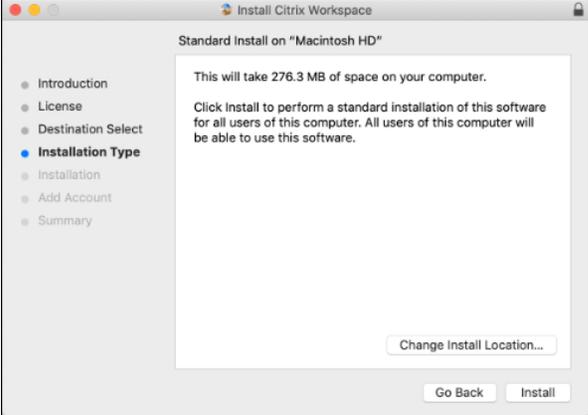
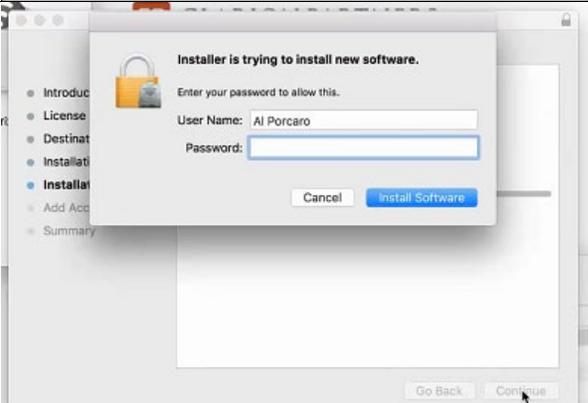
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<p>Click Continue.</p>	
<p>Click Continue to agree to License.</p>	
<p>Click Agree</p>	

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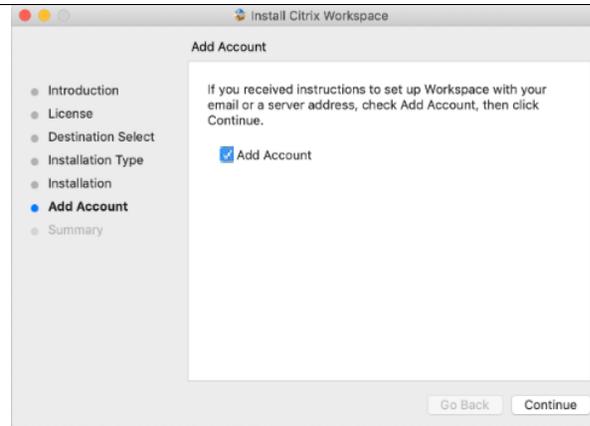
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<p>Click Install.</p>	
<p>Enter your MAC Password and click install software.</p> <p>***This account must be an administrator account on the MAC.</p>	

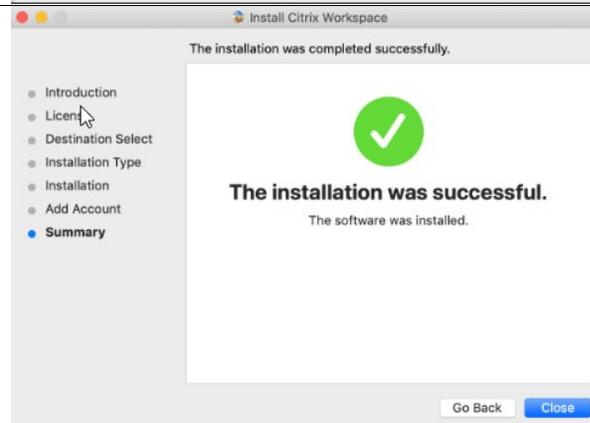
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Check the 'Add account' checkbox and click continue.

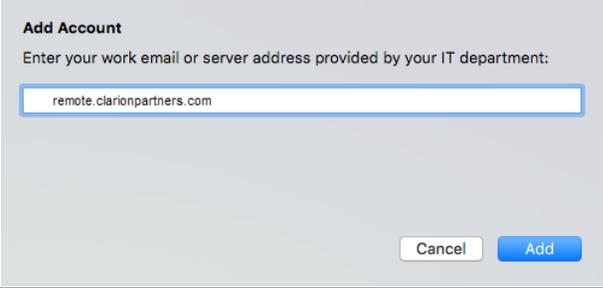


Click close to complete the installation.



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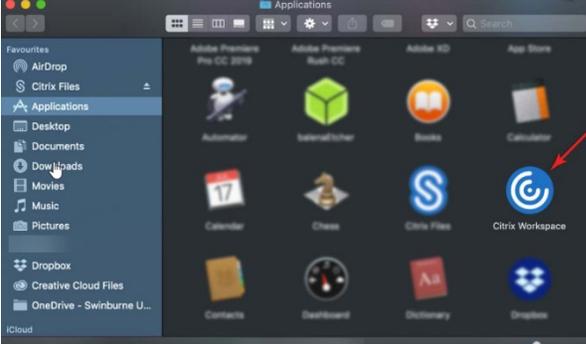
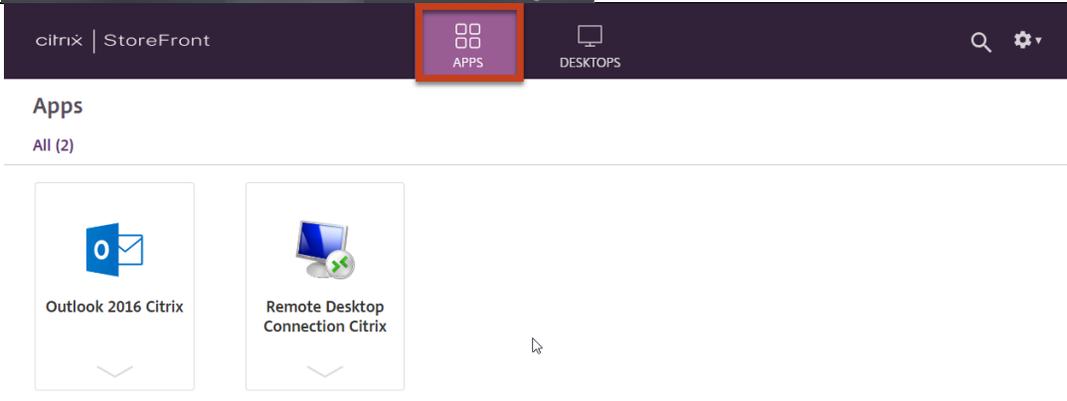
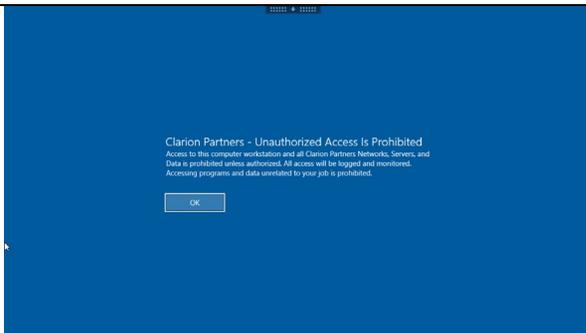
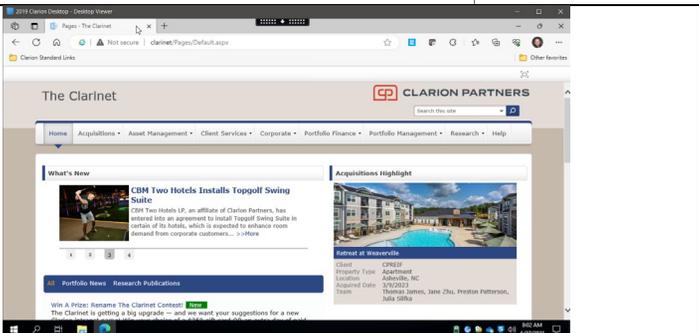
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<p>On the Add Account enter remote.clarionpartners.com</p>	
<p>Enter Clarion Partners credentials and Click Log on.</p> <p>**Upon clicking Log On, you will be prompted for multi-factor authentication on your mobile phone either by phone call, text message or Authenticator App, depending on which method you chose.</p>	

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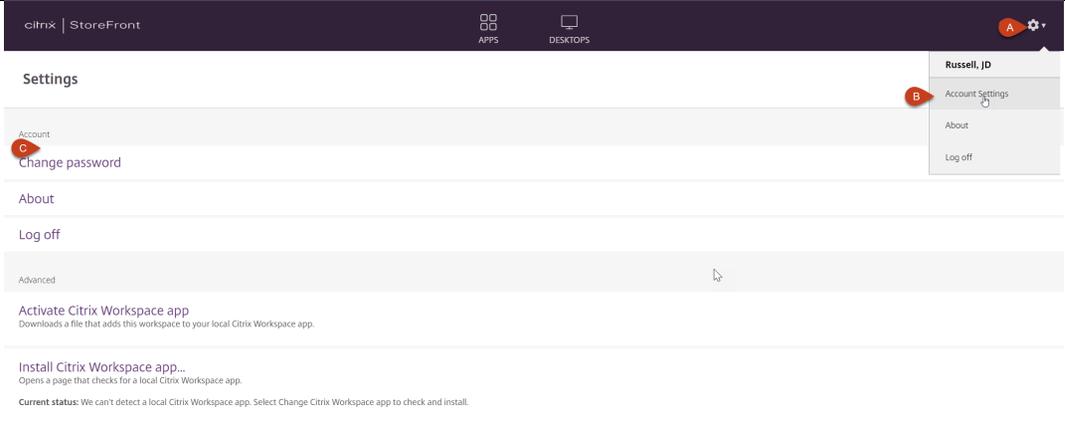
Personal Windows PC or MAC

Accessing Apps and Desktop from MAC OS

<p>Logging in</p> <p>To access the workspace after it is installed User finder and go to the applications tab and double click Citrix Workspace. Enter your credentials as shown in the step above.</p>		
<p>The APPS tab provides direct access to a specific application.</p> <p>If you do not see the applications as expected, click on the Main icon to bring you back to the Main access point in Citrix. If you are in the Main folder, and do not see a way to access the applications as expected, contact the Clarion Partners Helpdesk to request access.</p>		
<p>You'll see the screen first screen to the right, click 'OK' to acknowledge the logon warning and Citrix will load your desktop profile.</p> <p>***Note: If this is your first time logging in or you have not logged in for more than 30 days, this process could take a few minutes to complete.</p>		

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<p>Other Settings – Change your password.</p> <p>Need to update your password remotely? Once you logged into Citrix:</p> <p>Click the Gear Click Account Settings Click Change Password</p>	 <p>The screenshot shows the Citrix StoreFront Settings page. At the top right, there is a gear icon labeled 'A'. A dropdown menu is open, showing 'Russell, JD', 'Account Settings' (labeled 'B'), 'About', and 'Log off'. In the 'Account' section, the 'Change password' link is highlighted with a red circle labeled 'C'. Below the 'Account' section are 'About', 'Log off', and 'Advanced' sections. At the bottom, there are sections for 'Activate Citrix Workspace app' and 'Install Citrix Workspace app...', with a 'Current status' message indicating that a local Citrix Workspace app was not detected.</p>
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Troubleshooting Citrix access

Unable to login	<p>If you are unable to log on, try the following.</p> <p>Check your username and password combination. – DO NOT USE EMAIL ADDRESS Did you get an MFA notification on your mobile APP or a phone call from Microsoft? You might need to restart your computer as a recent update could be preventing the application from operating correctly.</p>
Citrix app or desktop doesn't launch after clicking the icons	<p>If you are using the Windows Edge Browser – you'll need to turn off SmartScreen in the settings to prevent issues with Workspace app:</p> <p>In Edge click the more button near your profile. This is also known as the Ellipsis. Click Settings ->Privacy, search, and services Under the Security Section – toggle the switch to turn off Microsoft Defender SmartScreen.</p> <p>Try to launch the Clarion Desktop or other Citrix app to see if it's resolved.</p>
Workspace app doesn't have recent apps available, or you receive 'cannot complete request' message	<p>You might have to reset the Citrix Workspace App.</p> <p>Right-click the Citrix Workspace app icon in the TaskTray (<i>near system clock</i>) Click Advanced Preferences Click Reset Citrix Workspace App. Close your web browser and login through https://remote.clarionpartners.com again.</p> <p>Check the Workspace App for updates:</p> <p>Right-click the Citrix Workspace app icon in the TaskTray (<i>near system clock</i>) Click Check for Updates Wait for updates to download and follow onscreen instructions. Close your browser and relaunch it and then try to log in again.</p>
Mouse cursor not aligned with Clicking actions in Citrix Applications.	<p>This happens sometimes because of video driver settings – to adjust do the following:</p> <p>Right-click the Citrix Workspace app icon in the TaskTray (<i>near system clock</i>) Click Advanced Preferences Click High DPI Change radio button to "No, use the native resolution." Click Save Right-click the Citrix Workspace app icon in the TaskTray (<i>near system clock</i>) Click Exit Open the Start Menu Scroll-down to and Click Citrix Workspace to launch.</p>

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Revision History

Version	Date Updated	Updated By	Details of Update
2023.1	6/28/2023	JD Russell	Initial draft