

Setting up your VDI Workspace – Onboarding (Windows)



This document details the actions necessary to access a KPMG virtual desktop (VDI) workspace on your Windows laptop. **Please read the complete document before starting the setup to ensure that the access is setup successfully.**

If you need help, refer to the **Troubleshooting** and **Support** sections of this document for guidance.

VDI Workspace Prerequisites and Considerations

Qualifiers and Restrictions

By accessing your VDI workspace, you agree:

- To comply with firm policies, including but not limited to the Acceptable Use Policy and US Risk Management Manual (e.g. Ch. 15), and follow the firm's documented Preservation guidelines as required;
- Not to process or store data subject to NIST compliance; and
- To follow all applicable export control plans.
- Not to use VDI while at a client engagement site;
- To adhere to client contract limitations that prohibit the use of personal equipment (if any); and
- That your device or equipment is not prohibited technology under the FAR clause implementing FY19 NDAA Section 889(a)(1)(B), including but not limited to equipment produced by Huawei Technologies Company or ZTE Corporation.

Contact your Manager or engagement partner for guidance.

Non-compliance with these conditions may result in disciplinary action.

If you disagree, contact the Digital Desk at +1 800-KPMG-HELP (+1 800-576-4435) or +1 201-571-3801 at once to have your VDI request cancelled. If you have already received VDI and you disagree with these terms, discontinue using VDI at once.

Onboarding User Information

Your onboarding user information will be sent to you in three separate communications:

- **Your KPMG Information 1 of 3** supplies VDI setup guidance. You will receive this communication on your alternate email (provided by you)
- **Your KPMG Information 2 of 3** supplies your Username and Employee ID. You will receive this communication on your alternate email (provided by you)
- **Your KPMG Information 3 of 3** supplies your Temporary Password:
 - US based: You will receive this communication on your mobile/cellphone number (provided by you)

- International: You will receive this communication on your secondary email (provided by you)


If you do not receive all three communications, send an email to us-nexusonboarding@kpmg.com.

Hardware and System Requirements

- ✓ Your computer must be a PC with Windows 10 or higher. For more details, see [Citrix Product Documentation – System requirements and compatibility](#).
- ✓ You will need an *iPhone or Android* device with internet connectivity. The mobile device must support the Okta Verify app, the Microsoft Authenticator app, and the RSA Authenticator app (if applicable) along with access to the alternate email account(s) you provided.
- ✓ You will need local administrator rights to install Citrix Workspace.
- ✓ You will need to connect your host computer to the internet during setup, and while using your VDI workspace.

Peripherals

Peripheral devices that are VDI compatible include:

- ✓ Headsets approved for use with Microsoft Teams. See [Headsets, Earbuds, and Headphones | Teams devices](#) for a list of compatible devices. **Note:** Connecting headsets via the laptop's Bluetooth or audio jack (3.5 mm) is not compatible. 
- ✓ Webcams approved for Microsoft Teams. The laptop's built-in camera is compatible. See [Web cameras | Teams devices](#) for a list of compatible external webcams.
- ✓ Keyboards connected via USB
- ✓ Mice connected via USB

Getting Started

Mobile App Installations

Security is at the forefront of everything we do at KPMG and we have multiple layers of security to protect the US firm and client data.

On your mobile device, download the following apps from Apple App Store or Google Play:



Microsoft Authenticator
Protects your online identity



Okta Verify
Business

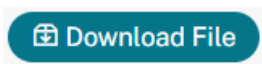
Citrix Workspace Installation

On your laptop, install the Citrix Workspace application by following the instructions outlined below. Also, it is recommended that you remove earlier installed versions. (To remove a Windows application, go to **Apps & features**.)

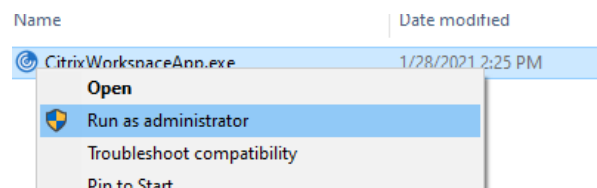
1. Go to [Download Citrix Workspace](#).

KPMG currently supports Citrix Workspace LTSR 2402.

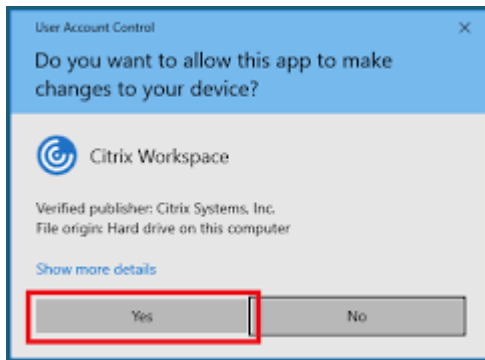
2. Locate the Citrix Workspace app for Windows LTSR 2402 Cumulative Update 1 (not the offline installer) and Click **Download File**.



3. Accept the End-User License Agreement.
4. Go to **CitrixWorkspaceApp.exe** in your Downloads folder and right-click to select **Run as administrator**.

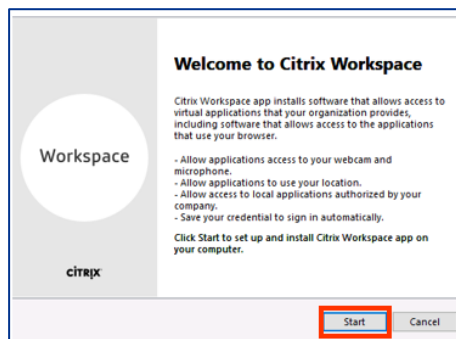


5. Click **Yes**.

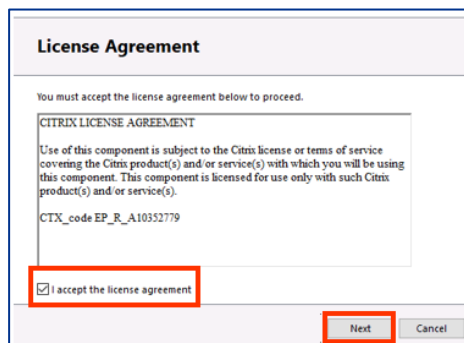


If you are unable to run as administrator, contact the relevant technology department for assistance.

6. Select **Start** on the Welcome to Citrix Workspace window.



7. Agree to the terms of the **Citrix License Agreement** and click **Next**.

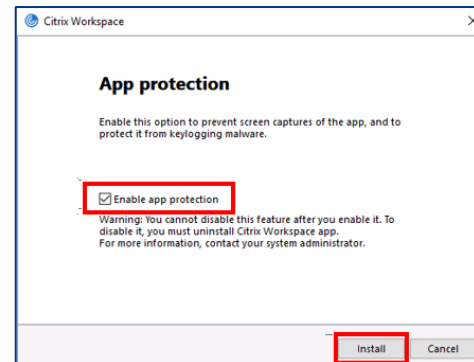


8. If prompted to Enable Single Sign-on, click **Next** to continue.

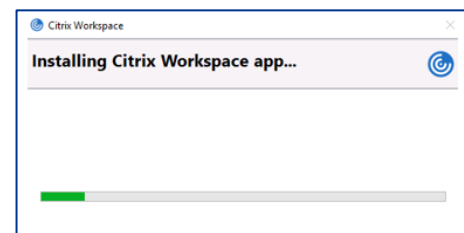
9. Check the **Enable app protection** checkbox and click **Install**.

Failure to select "Enable app protection" will result in being unable to access the KPMG VDI Environment.

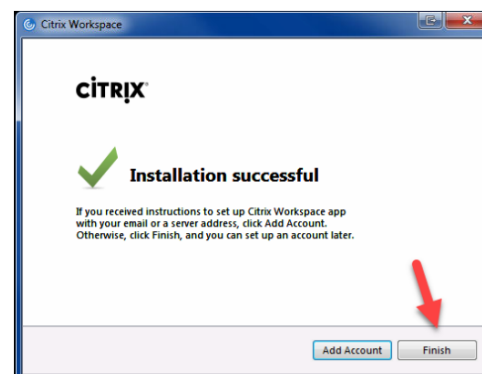
Important - If you do not see this choice, Citrix was not installed with administrator rights. **Please revisit Steps 3-4.**



10. Citrix Workspace will begin to install

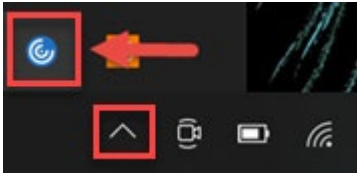


11. **Click Finish.** If you are prompted to reboot, do so and continue to the next step.

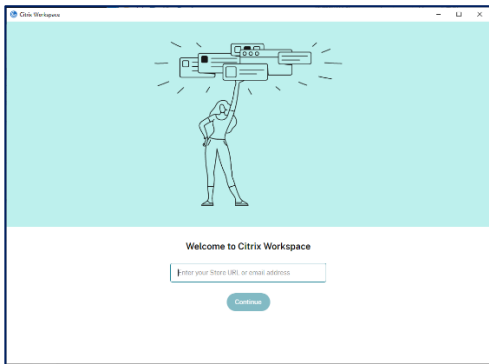


Okta Verify and Citrix Workspace Configuration

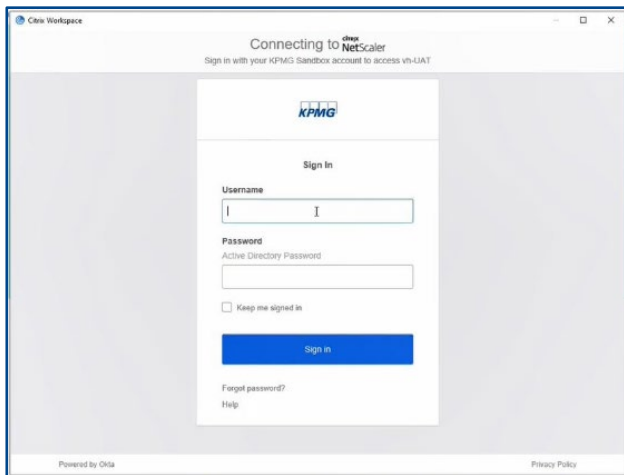
1. Click on the **Show hidden icons menu** in the system tray and click **Citrix Workspace**.



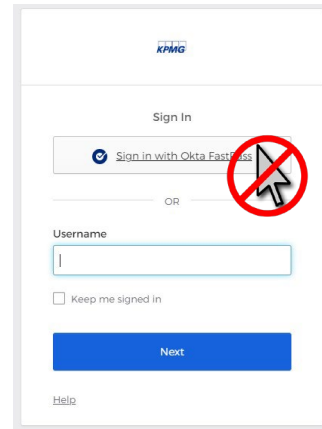
2. Enter **https://vh.shs.us.kpmg.com?vhshs** and click **Continue**. The s in https is required.



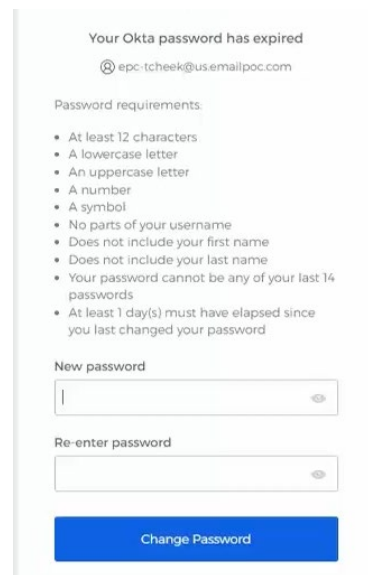
3. You will receive a prompt for your KPMG credentials. Enter your **username** and **temporary password** shared with you in Email 2 and 3 and click **Next** or **Sign in**.



Note: If you are presented with the option to use Okta FastPass, DO NOT SELECT IT.



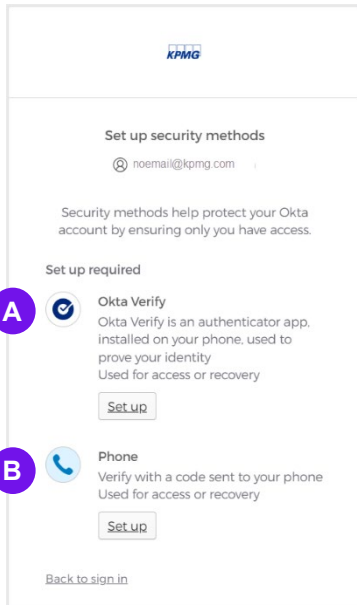
4. At the *Okta password has expired* prompt, enter a **new password** and confirm the new password according to the listed password requirements and click **Change Password**.



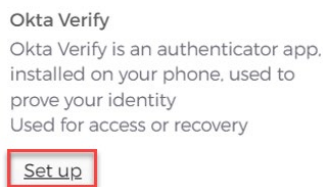
5. You will be prompted to setup a security method. It is recommended to setup and use Okta Verify as the primary method and Phone as the optional secondary method.

A. Recommended Primary: Okta Verify – A Mobile App installed your mobile device

B. Secondary: Phone – A text message (SMS) or voice call to your mobile device



6. Select **Set up** under the **Okta Verify** option.



A QR code will be displayed.



7. **On your mobile phone**, open the **Okta Verify** app.



- Select **Add account** at the bottom of the screen.
- Select **Organization**.
- When the screen displays, “Do you have your QR code?” select **Yes, ready to scan** to open the camera on your device.
- Click **OK** to allow Okta Verify to access and open the camera on your mobile device.
- Scan the QR code that appears on your computer.**
- You will have the option to **allow push notifications** or skip this process.

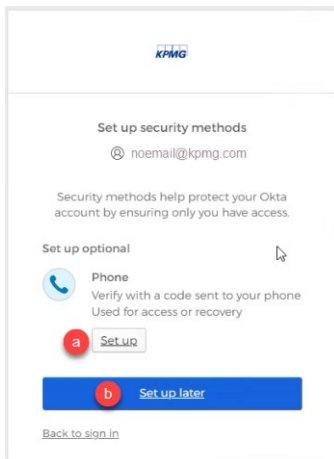
Note: It is strongly recommended to click Allow. If you select Skip, you will need to access with the code every time the app launches.

- g. You will have the option to enable Face/Touch ID (Apple) or biometrics (Android). Click **Enable** or **Not Now**, depending on your preference.
- h. The screen will display, "Account Added." Click **Done**.

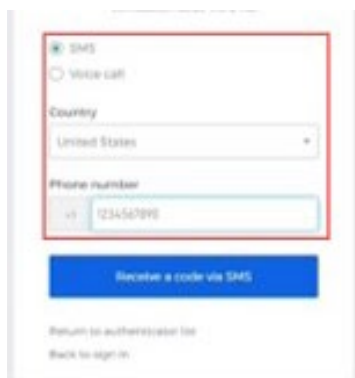
8 Optional Instructions to setup the Okta Phone Text or Voice Call Setup:

If you have already setup Okta Verify, you will have the option to set up an additional authentication method via Phone. Setting up via phone will allow a backup method of authentication.

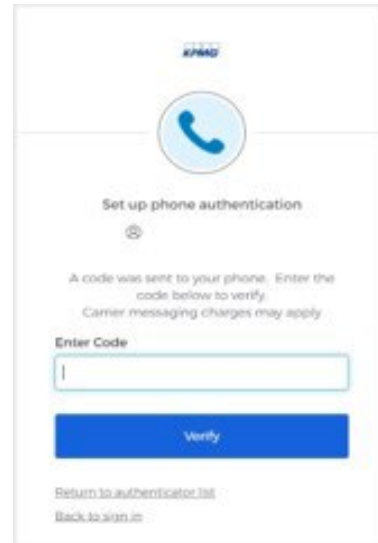
On your computer, click **Set up** under **Phone**.



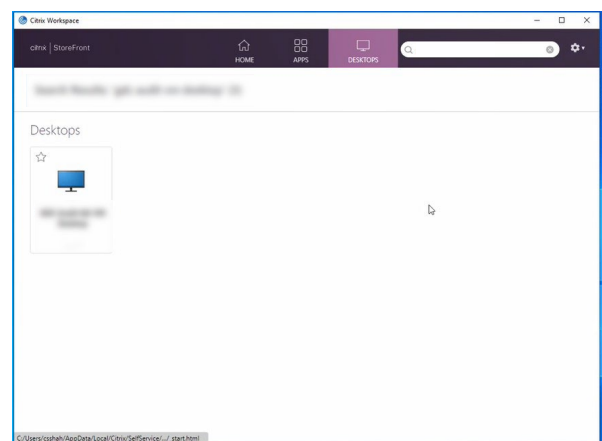
1. Select your **preferred method** to receive a code, either **SMS** or **Voice call**.
2. Enter the preferred **phone number** and click **Receive a code** button.



3. **On your computer**, enter the code that was sent to your phone via SMS or voice call.



4. Click **Verify**.
5. If you are presented with a option to setup Okta Verify, review the previous steps to do so. Otherwise, clicking **Set up later** indicates that you are only setting up one authentication method for now and wish to proceed.
9. Once logged into Okta, you will be logged into Citrix Workspace and presented with a Citrix Workspace window. Click on the **Desktop menu icon** and double-click the **available Desktop icon** to launch the VDI.



The Windows desktop will launch.

Initial Setup of the Windows Desktop

Software Installation Prompt



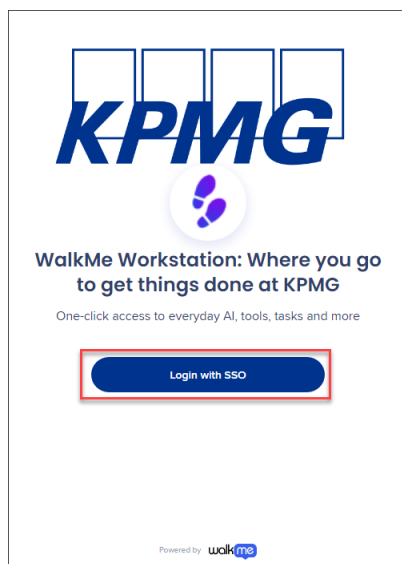
If a **Software Installation** window opens during your initial setup:

1. Click the **Schedule** button.
2. In the next window, choose the **Remind me tomorrow** radio button and click **OK**.

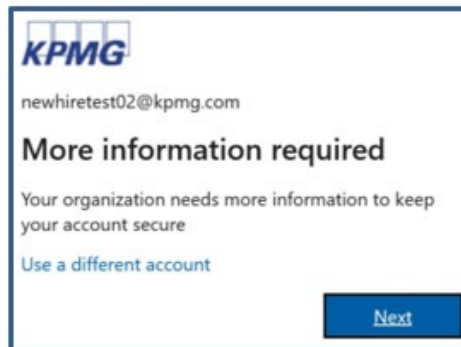
It is recommended that you run software installations as soon as possible.

WalkMe Workstation and Microsoft Authenticator Setup

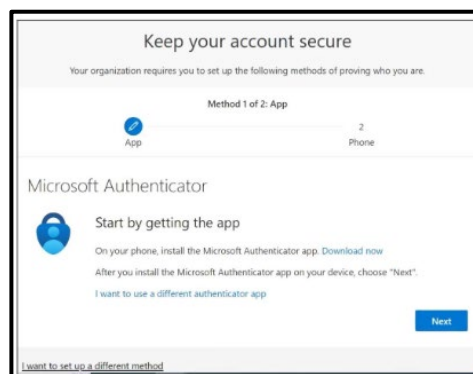
1. Click **Login with SSO**.



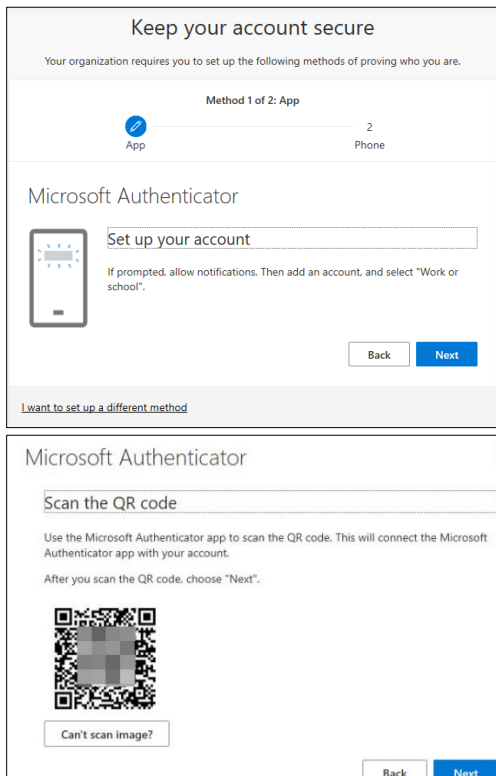
2. An Edge browser window opens with a **More information required** page. Click **Next**.



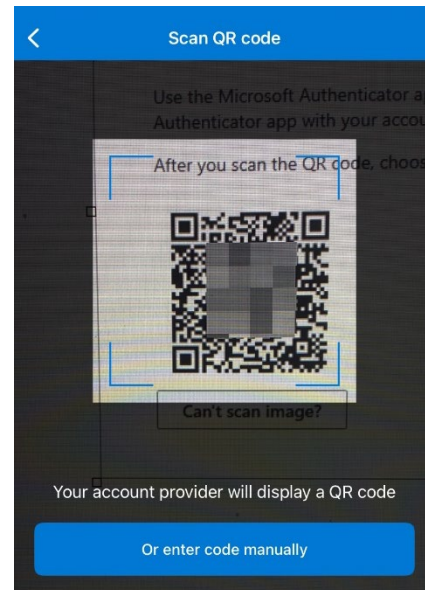
3. The **Keep your account secure** screen is presented. Click **Next**.



4. **On your laptop**, click **Next** to set up your account. A QR code will be displayed to be scanned with your mobile device.

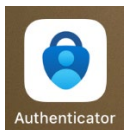


- f. Scan the QR code displayed on your laptop.



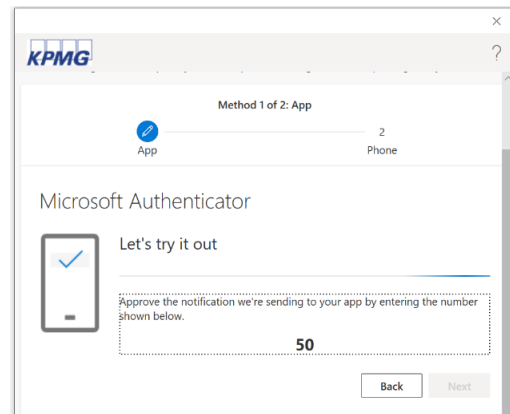
If you are unable to scan the image, click the **Can't Scan Image?** option on your laptop so you can enter the code and URL manually on your phone.

5. **On your mobile device**, open the Microsoft Authenticator app.

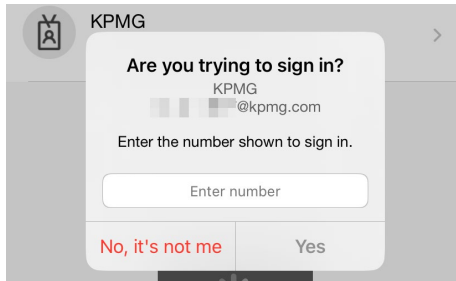


- Allow notifications if prompted.
- Allow access to your camera for QR code scanning if prompted.
- Choose **Add Account**.
- Choose **Work or school account**.
- Select the **Scan QR code** option.

6. **On your laptop**, select **Next** and a two digit code will be displayed.

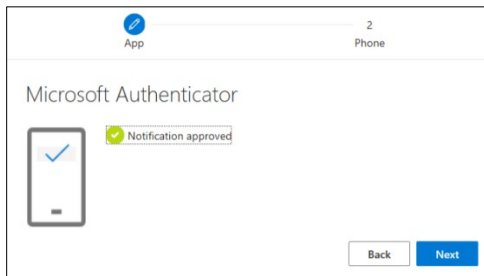


7. **On your phone**, enter the provided two digit code in the **Enter number field** and click **Yes**.

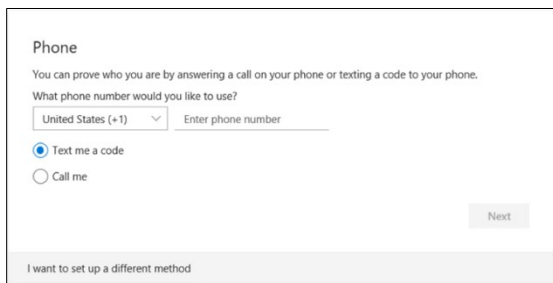


Your account will be added to the Microsoft Authenticator app and the setup on your phone is complete.

8. **On your laptop**, a **Notification approved** confirmation will be displayed. Click **Next** to continue.

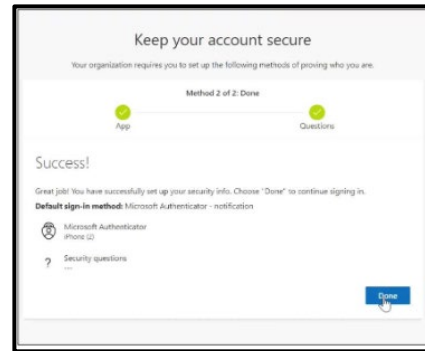


9. At the Phone setup screen, click **Next**.
10. Enter your mobile phone number and choose to receive a text or to be called.

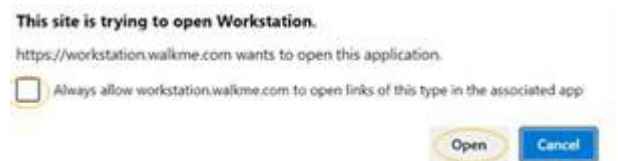


11. Complete the next steps to either enter the received code or to confirm via received call.

12. At the Success message, click **Done** to complete the registration.



13. At the **Stay signed in to all your apps** window, click **OK**.
14. At the **You're All Set** message, click **Done**.
15. On the *This site is trying to open Workstation* prompt, click the **Always allow checkbox** and click **Open**.



16. Click **Launch Workstation**.

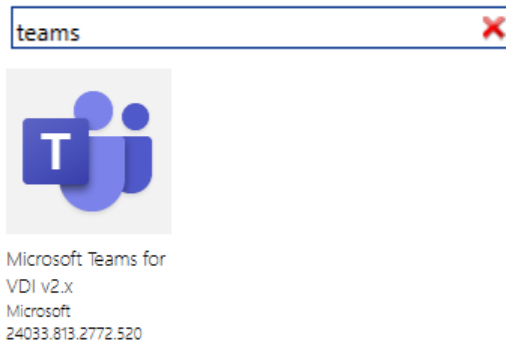


17. Proceed with steps to select your language preference (English is recommended for content) and to connect SharePoint and other apps.

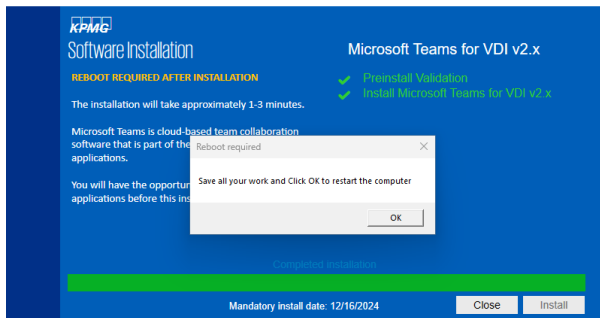
Microsoft Teams Setup

IMPORTANT: DO NOT use the preinstalled Microsoft Teams (personal). It must be installed from Software Center.

1. Open **Software Center** via Windows Start Button – All apps – Software Center or Windows Search and use the search for the Microsoft Teams installer called **Microsoft teams for VDI**.



2. The installer will require a restart of Windows in the virtual desktop. As part of a restart, the session will also disconnect/close the session window. Click **Install** and **OK**.



3. To relaunch the virtual desktop (VDI), **wait 5 minutes** and go to Citrix Workspace and launch the virtual desktop.
4. The virtual desktop session will prompt you for a username, password, and require you to acknowledge via the Okta Verify app on your mobile phone.
5. **Launch Microsoft Teams** via Windows Start Button – All apps – Microsoft Teams or via Windows Search.
Note: DO NOT launch Microsoft Teams (personal). Setup is complete.

Setting up an RSA token (Optional)

Note: Depending on the applications you were given access to, it may be necessary for you to setup an RSA Token to obtain a passcode to log into the applications.

Refer to [KB0061516, How can I request and setup RSA on my mobile phone?](#) for setting up an RSA token (SecurID OTP Credential) on your mobile phone.

Shutting Down Your VDI

IMPORTANT – PLEASE REVIEW:

Once finished working in the virtual desktop session, shutdown the virtual desktop first by going to the **Windows menu (Start menu) and to Power – Shut Down**. Shutting down the VDI will properly close the session on the server so it can be accessed again.

Additionally:

- ✓ If the VDI window is closed before signing out of Windows (within the VDI), the laptop is put to sleep by closing the lid, or Windows is shutdown on the laptop while the virtual desktop is running, the VDI session will not shutdown properly.
- ✓ Once the virtual desktop is shutdown, you can shutdown the laptop.

Troubleshooting

Add account fails

Adding an account to Citrix Workspace could fail if there are issues with the firewall/network:

- Open browser and browse to <https://vh.shs.us.kpmg.com>
- Verify that you can login with your **password** (*the password normally used to login to our workstation*) and RSA **passcode** (*PIN + six-digit code in the RSA App*).
- If you can't browse to the site, you will need to contact the Technology Helpdesk that supports your laptop or local network (ex. client network).

Reset Workspace app

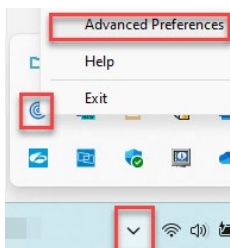
Occasionally you may need to reset the Citrix Workspace to fix issues with applications or desktops not appearing in Citrix Workspace.

There can be an initial delay of 3-5 minutes before the desktop launches. If you are past that point, do the following:

1. Click on the Windows system tray menu.



2. Right click on the Citrix Workspace icon and choose Advanced Preferences.



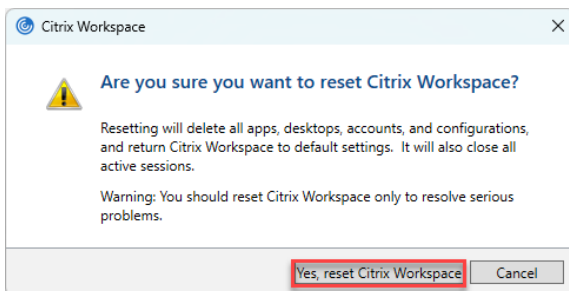
3. Select Reset Citrix Workspace.

Advanced Preferences

[Connection center](#)
[Shortcuts and Reconnect](#)
[Data collection](#)
[Reset Citrix Workspace](#)
[Support information](#)
[Citrix Files](#)

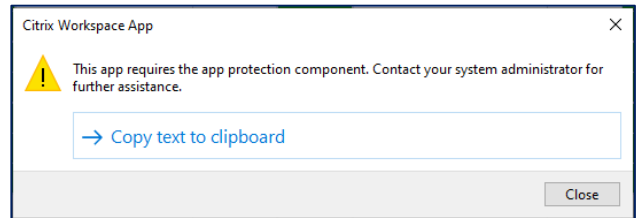
[High DPI](#)
[Keyboard and Language bar](#)
[Configuration checker](#)
[Delete passwords](#)
[Citrix Casting](#)
[Log Collection](#)

4. Click on **Yes, reset Citrix Workspace**.



5. Restart Windows.
6. Open Citrix Workspace.
7. In the Welcome to Citrix Workspace window, enter **https://vh.shs.us.kpmg.com?vhshs** into the **Enter your Store URL or email address field**, and click **Continue** and proceed with logging in.

This App Requires the App Protection Component Error



If you receive this error message, you have installed Citrix Workspace incorrectly. Please uninstall and then reinstall the application per the instructions in this document. Pay particular attention to the steps to run as administrator and enable app protection.

Error: There are no apps or desktops available for you at this time.



If you receive this error message, you have installed Citrix Workspace incorrectly. Please uninstall and then reinstall the application per the instructions in this document. Pay particular attention to the steps to run as administrator and enable app protection.

Support

If you need initial help with accessing your virtual desktop, please contact the Digital Desk's Citrix VDI Help Line at **201-505-3775** on Monday – Friday from 7:00 am to 6:00 pm EST:

- Identify yourself as a VDI user
- Alert the Analyst if you are using a personal or non-KPMG device
- Notify the Analyst if you have already received other information about your password or changing your password.

For regular or after-hours assistance, contact the Digital Desk which is available 24/7:

- For **non-critical issues** that do not affect productivity, launch CORE . To launch, use the Search in the Windows Taskbar or launch from Windows Start – All apps – Utilities – CORE. For chat, click .
- For **critical issues** that impact productivity and widespread incidents, call +1 800 KPMG HELP (+1 800 576 4435) or 201 571 3801.

For issues related to your laptop's hardware or the installation of the Citrix Workspace software, please contact the Technology Helpdesk that supports the laptop or network.