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Certified Public Accountants and Advisors

User Guide for Client Remote Access

Version 1.2

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Introduction

Welcome to the Client Remote Access User Guide. This will demonstrate to you how to access the resources available through the Client Remote Access website.

Access is available on multiple platforms (PC, Mac, iPads/iPhones and the newer Android devices). Each platform has a different method for accessing the resources.

Before accessing the resources on the Client Remote Access website, you must provide an email address (preferably the same email address used to access your NetClient CS portal) and complete the **Microsoft Multi-Factor Authentication** user enrollment on pages 4 -7.

Note:

If you are accessing the resources for the first time, we **HIGHLY recommend you change your password from the one initially given to you. You can reset your password by accessing the website through a web browser (see page 24).**

Microsoft Multi-Factor Authentication

Introduction

Multi-factor authentication pairs something you know (your username and password) and something you have (your phone) to complete your authentication. **Microsoft Multi-Factor Authentication (MFA)** has a variety of authentication methods to choose from and a self-service user portal website to allow you to enroll and update your settings. Your remote login will consist of your KGSG credentials as the first factor of authentication and then using MFA as the second factor of authentication. MFA utilizes a person's mobile device as the main device for second factor of authentication.

Methods of Authentication

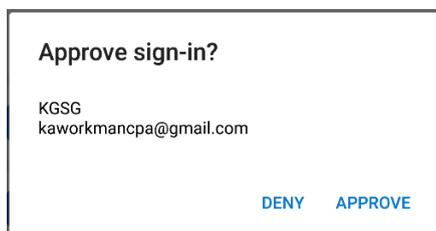
You have a choice between 3 methods of authentication, and you can switch your method at any time using the self-service user portal:

<https://remote.kgsgcpa.com/Portal/>

1. Mobile App (Recommended)

How it works:

You will receive a prompt from the Microsoft Authenticator app on your mobile device asking you to **tap approve** to complete your authentication.



Requirements:

- Apple, Android, or Windows smartphone or tablet.
- Data or WIFI internet connection.
- Push notifications enabled.

Installing the Mobile App:

- Search for "Microsoft Authenticator" from your mobile device's app store and install it:
- Activate with your KGSG MFA account. (described in user enrollment section on pages 4-7)

2. Phone Call

How it works:

You will receive a phone call with an operator asking you to **press #** on your phone to verify your authentication.

Requirements:

- Any type of phone with a # button.

3. Text Message

How it works:

You will receive a text message on your mobile phone asking you to **reply with the unique 6 digit verification code provided.**

[698292](#)

Reply with this verification code to complete your sign in verification to User Portal.

Requirements

- Any mobile phone capable of receiving and sending text messages.
-

User Enrollment

1. Go to the **Multi-Factor Authentication User Portal**: <https://remote.kgsgcpa.com/Portal/> from any computer

Language: en: English

User Guide Help

K G Kelley **G** alloway
S G Smith **G** oolsby, PSC

Multi-Factor Authentication User Log In

Welcome to the Multi-factor Authentication (MFA) user portal. You will be asked to authenticate with your chosen multi-factor method when connecting to the MFA portal regardless of network location.

- **Authentication device not available?** If you are accessing this site to change your preference, because you do not have your primary authentication device, log in and wait approximately 60 seconds for your security questions to appear.
- **First time here?** If this is your first time accessing the MFA portal, log in and you will be prompted to create security questions and setup your account for the first time.

Username: jdoe@kgsgcpa.com
mancpa@gmail.com
Password
.....
Log In

Multi-Factor Authentication User Portal login page

2. Type in your KGSG credentials (email address and password provided during setup) and click “Log In.”
3. **Choose an authentication method** you prefer and complete the requirements for the method (Mobile App method is the default).

Multi-Factor Authentication User Setup

To enable Multi-Factor Authentication for your account using the mobile app, you'll first need to install the Azure Authenticator app on your phone and then click the Generate button below to receive an activation code. The activation code will be entered in the mobile app to complete the activation process. The activation code expires in 10 minutes.

Method
Mobile App

After installing the Azure Authenticator app on your phone, click the button to generate an activation code.

Generate Activation Code Cancel

Method
Mobile App
Phone Call
Text Message
Mobile App

For users using the **Mobile App method** follow these steps to activate your account:

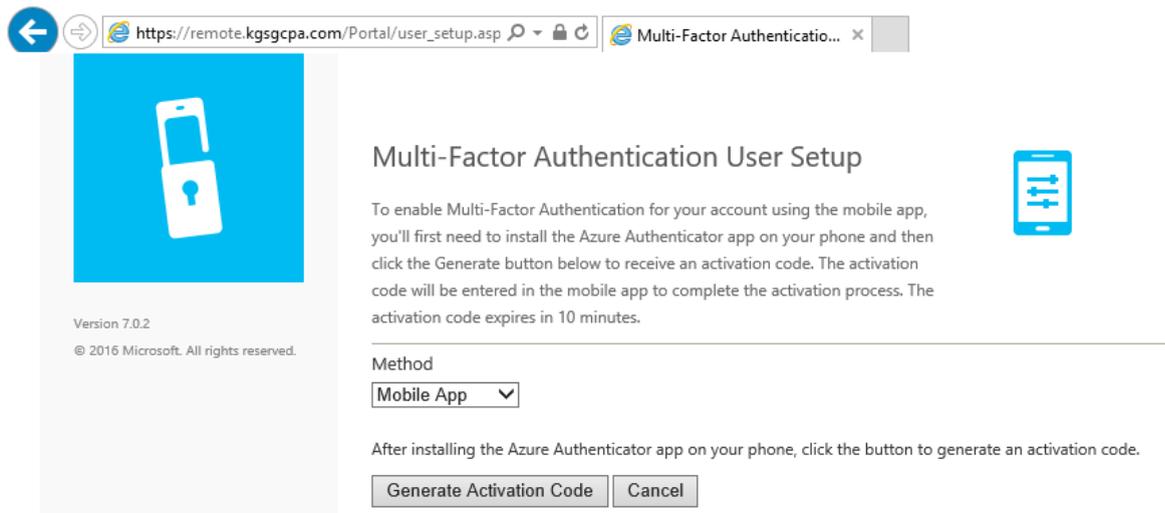
- If you have not done so, **install the Microsoft Authenticator app** on to your

mobile device by going to the app store (iTunes app store on iOS or Google Play store on Android) and search for **Microsoft Authenticator**.



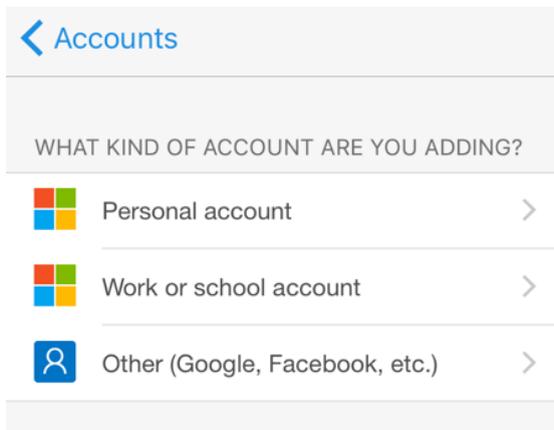
Microsoft Authenticator app in the iOS app store

- Ensure your mobile device can connect to the internet and **allow push notifications for the app** when prompted.
- Click on the **Generate New Activation Code** button under the **Activate Mobile App** menu.

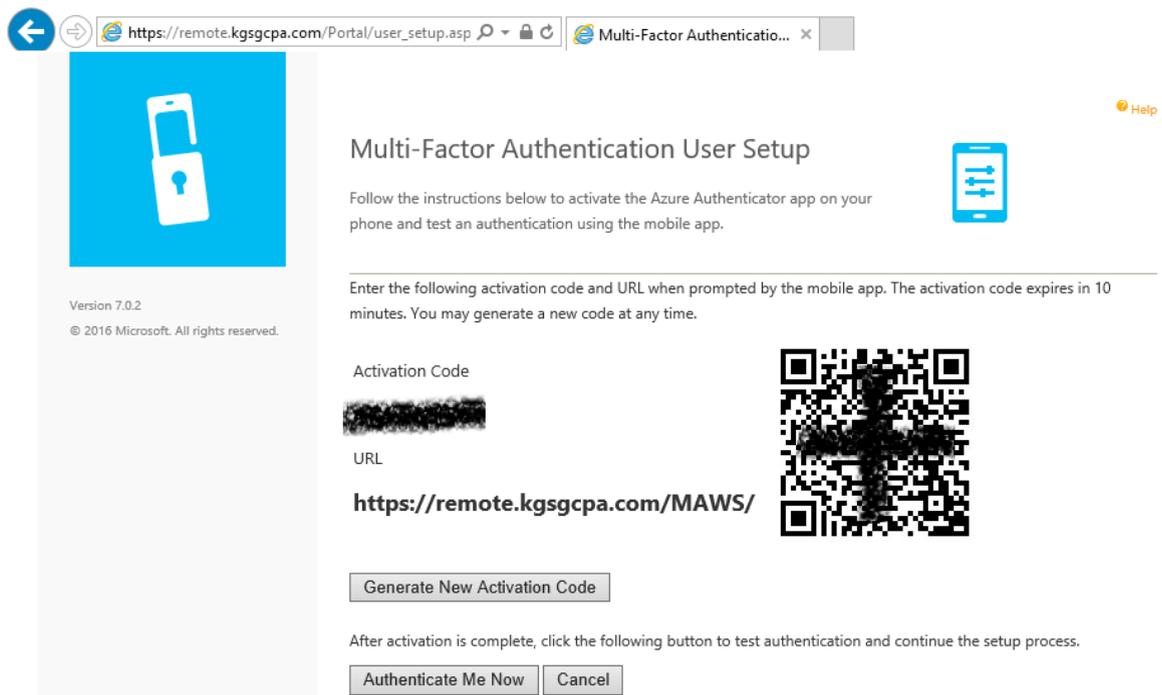


Generate Activation Code

- Open the Microsoft Authenticator App on your iOS or Android device and choose add “Work or school account.”



- You will be presented with the camera to scan in the QR code shown on the website.



QR code to scan using your device's camera

- Hold your mobile device's camera to your computer monitor and scan the QR code. (You can manually type in code and URL also).
- After scanning the QR code, **the activation is complete.**
- Click "Authenticate Me Now" to go to the next steps.

For users using the **Phone Call or Text Message method**, follow these steps to complete your settings:

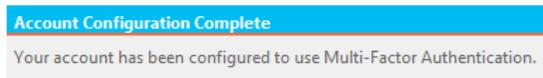
- Enter in the **phone number** you will be using along with the appropriate **country prefix.**

New Phone Number
United States & Canada +1 123-456-7890
Save

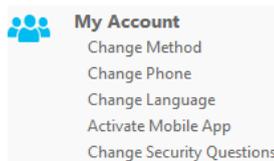
4. Answer four of the **Security Questions**. These questions will be used to validate your identity if you need support or for fallback in case you cannot get into the user portal.

Security Questions
Please choose security questions and answers before continuing. These questions will be used to validate your identity should you need support using Multi-Factor Authentication.
Question 1
What is your favorite sports team?
Answer

5. A welcome screen will be displayed once your enrollment is complete.



6. Afterwards, you will see a list of the self-service menu options available for you to update your settings if needed.



7. Go to the **Change Method** Menu and confirm you have selected the method you want.

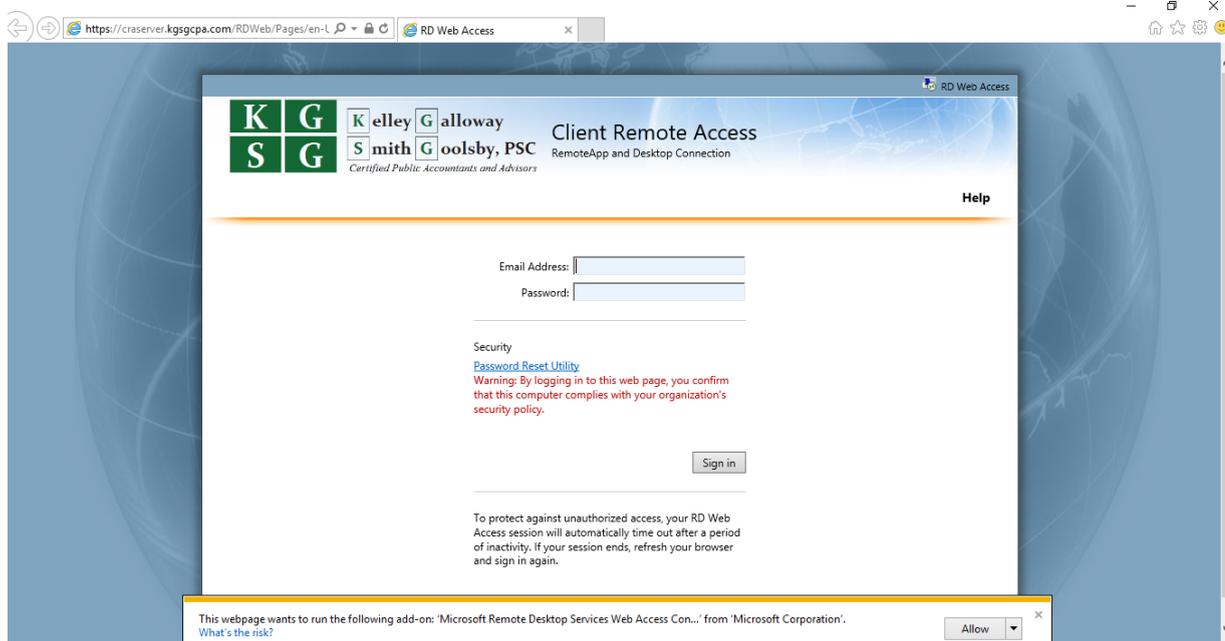
Method
Mobile App
Phone Call
Text Message
Mobile App

Accessing Remote Resources

Windows Platform

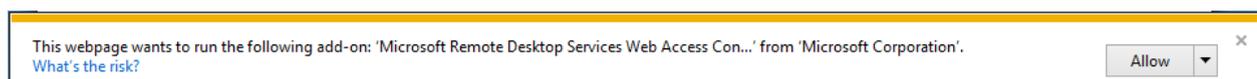
In the address bar of Microsoft's Internet Explorer (IE) web browser* (while other browsers can be used, the best experience is with IE), please type the following:

<https://craserver.kgsgcpa.com>



The remote access website home page

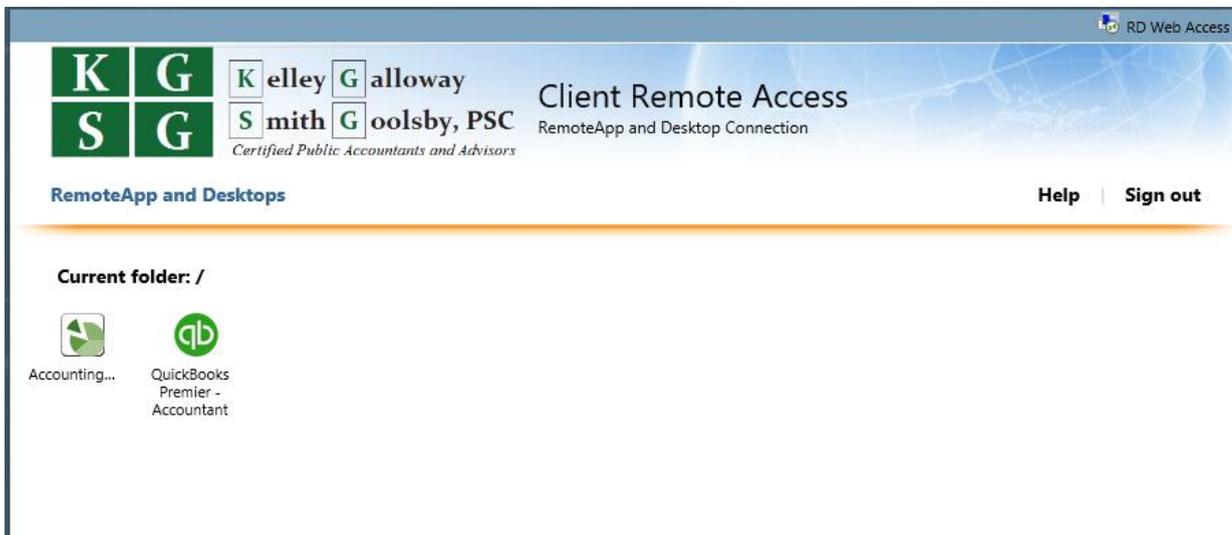
You may be presented with the add-on security warning for the Microsoft Remote Desktop Web Access Active-X add-on. If so, click Allow on the message line. After you have run the add-on you may need to refresh the Web page.



Active-X notification

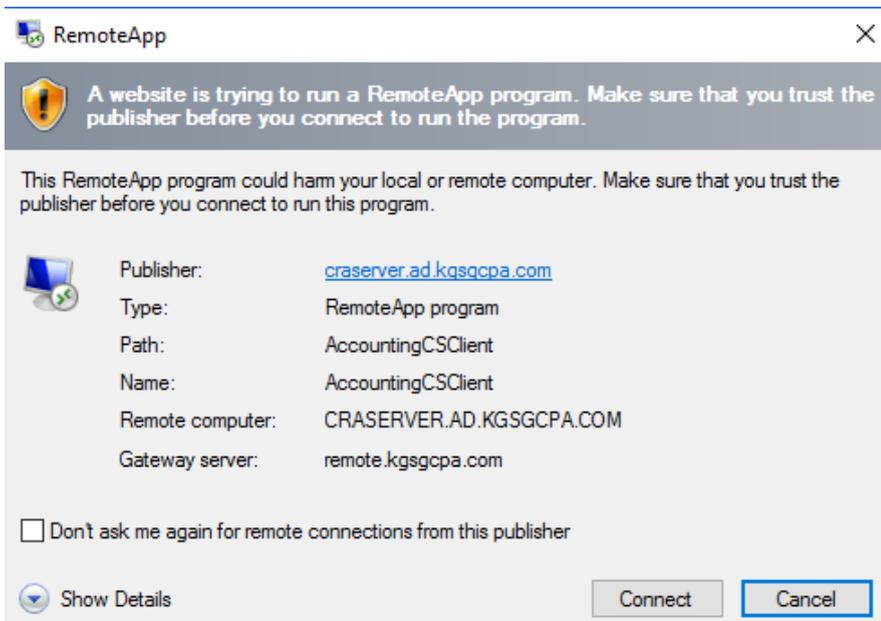
Once the page has loaded you will be taken to the login screen. The login details are the email address and password provided during setup.

Upon successful sign-on, you will be redirected to the RemoteApps and Desktop page, which will present a list of programs made that are available to you.



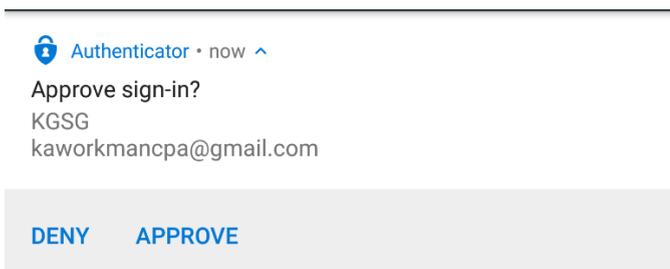
Available programs for remote access

Upon selecting an application to run, you may be prompted to allow access to the server. Simply check the “Don’t ask me again” box, press Connect.



Access request notification

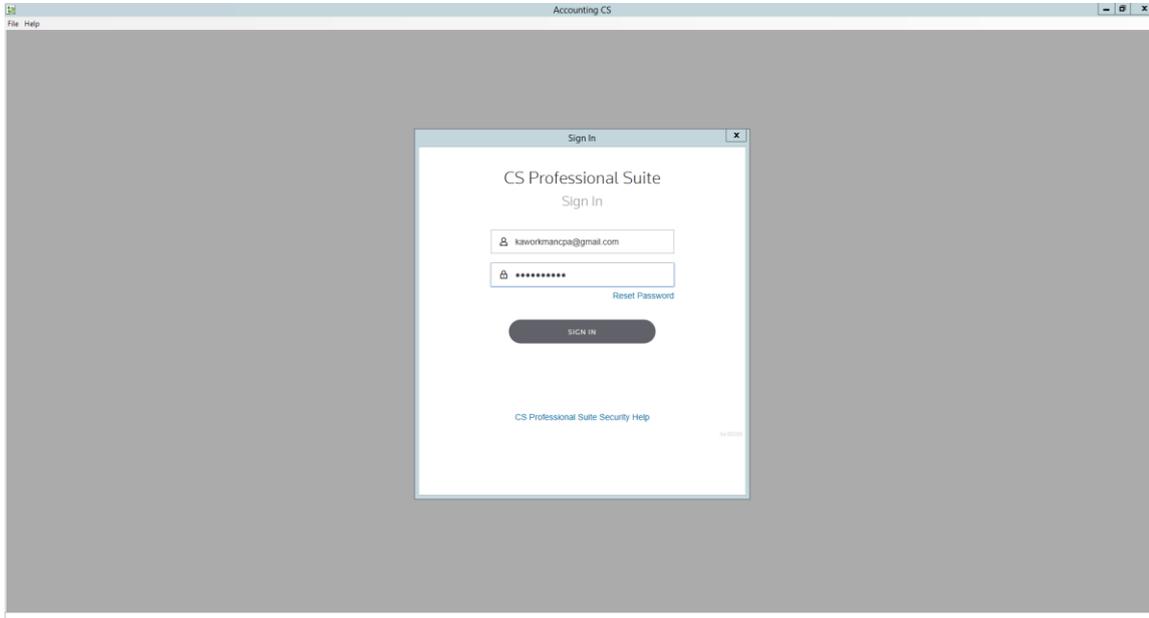
At this point you should receive a notification from the **Microsoft Authenticator** app (or text message/phone call if either of those options were selected) on your iOS or Android device to approve your sign-in. Tap “Approve” on your device to complete the connection.



Microsoft Authenticator approval notification

After successfully connecting, you will be presented with the requested application. Enter your logon credentials (**NetClient CS credentials for Accounting CS Client Edition**).

If this is your first time accessing the Accounting CS Client Edition software, please see the initial setup instructions on page 26.



Accounting CS Client version

*NOTE: When using Google Chrome, Microsoft Edge or Firefox you will notice a downloaded file on the bottom left of the screen.



Simply click on it and follow the prompted instructions. You may be prompted to re-enter your username and password.

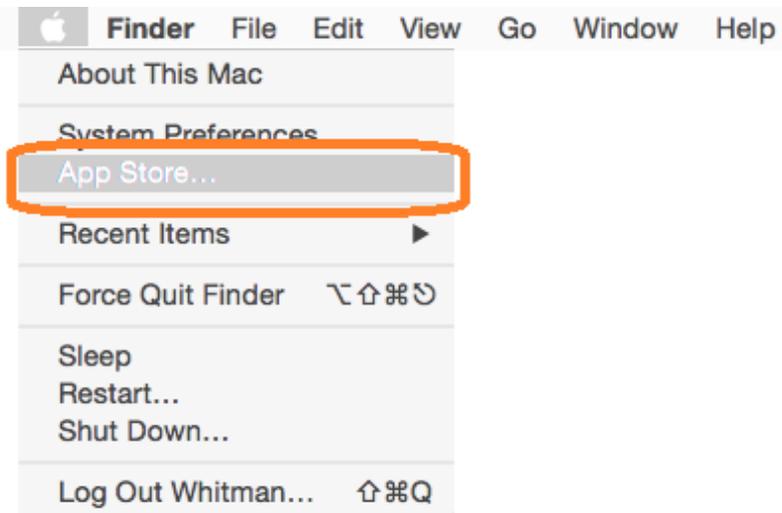
This concludes the remote access instructions for the Windows Platform.

Please note that first time users may experience slow loads for the first time they attempt to access the portal.

Mac Platform

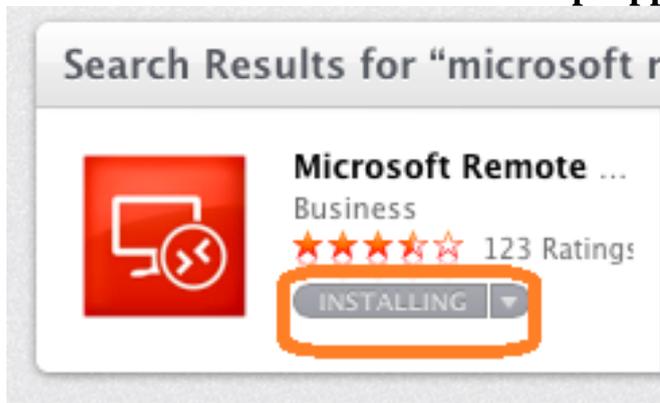
Before logging into the portal you must have **Microsoft Remote Desktop App** installed on your Mac.

Go to the **App Store** on your Mac and then click on the search bar in the top right corner of the screen that opens. Search **Microsoft Remote Desktop**.

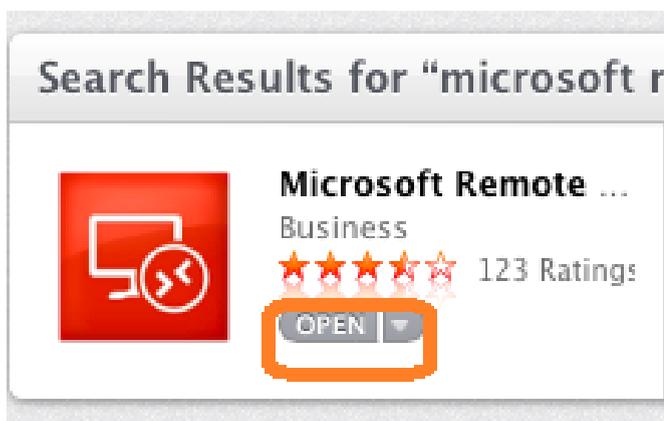


App Store location

Install the **Microsoft Remote Desktop App** and once it is ready, open the app.



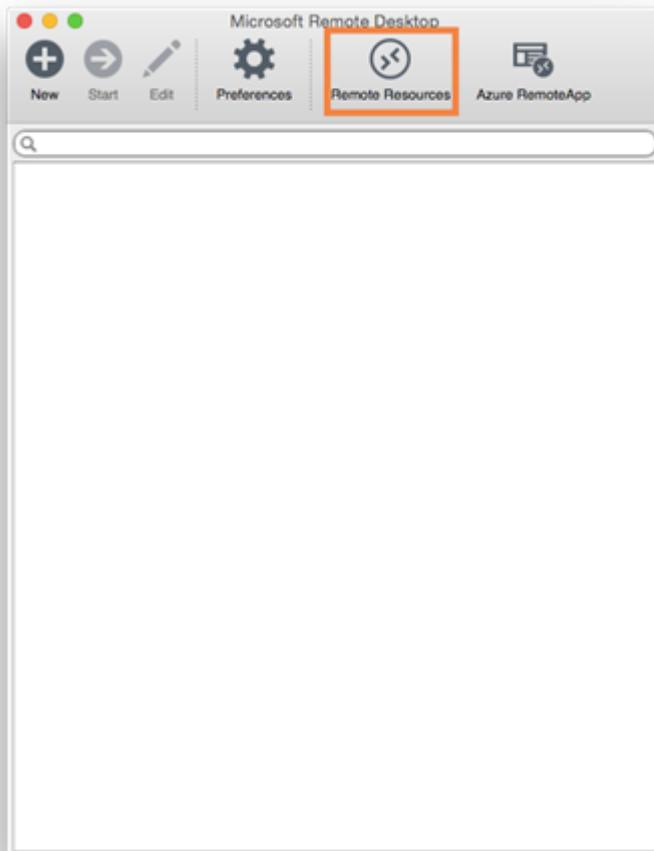
Installing notification



Click Open

Before you are ready to connect to the portal, you'll need the connection information.

First click the “**Remote Resources**” icon.



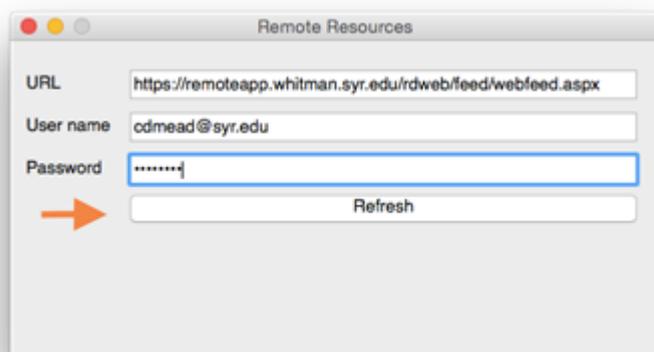
Remote Resources icon

Type the following information to gain connection:

URL: <https://craserver.kgsgcpa.com/rdweb/feed/webfeed.aspx>

User name: Email address

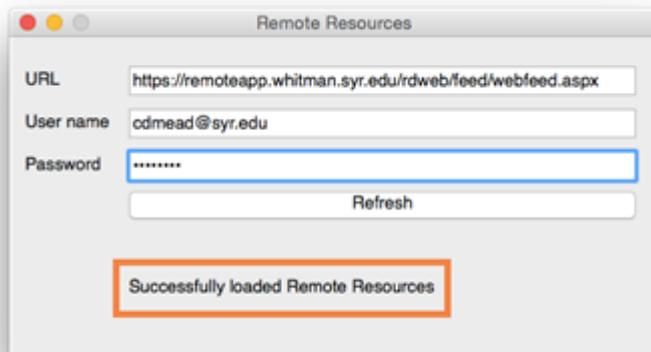
Password: [YOUR PASSWORD]



Remote Resources setup window

The login details are the email address and password provided during setup.

Once you have completed entering your information, you then must press the refresh button and a message should appear saying ‘Successfully loaded Remote Resources;’ then you may close the window.

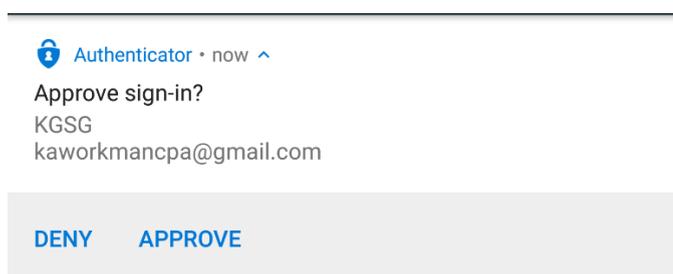


Successfully loaded Remote Resources confirmation

If done correctly, a list of apps will appear, if not simply press on the refresh button located near the remote resources title. If you don't see the list, make sure you are connected to the internet and try to input your information again.

Now you will have access to any applications that are currently available to your account. Simply click on the application you wish to use and it will run after a short loading screen.

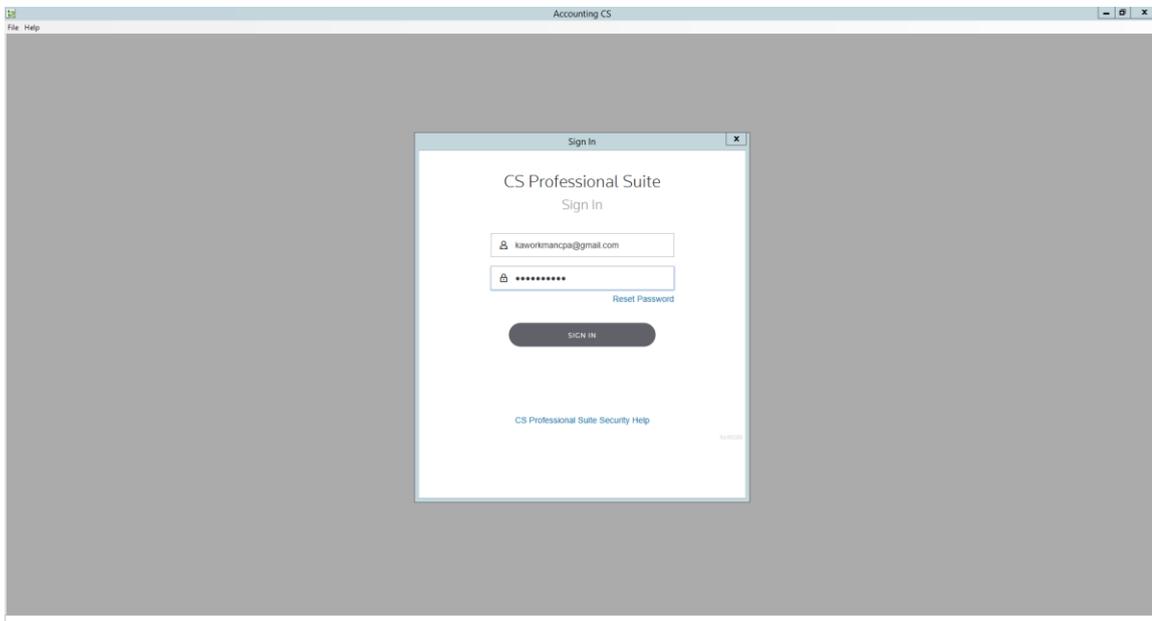
At this point you should receive a notification from the **Microsoft Authenticator** app (or text message/phone call if either of those options were selected) on your iOS or Android device to approve your sign-in. Tap "Approve" on your device to complete the connection.



Microsoft Authenticator approval notification

After successfully connecting, you will be presented with the requested application. Enter your logon credentials (**NetClient CS credentials for Accounting CS Client Edition**).

If this is your first time accessing the Accounting CS Client Edition software, please see the initial setup instructions on page 26.



Accounting CS Client version

This concludes the remote access instructions for the Mac Platform.

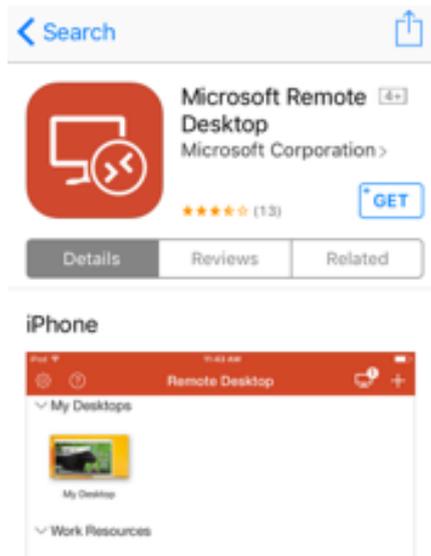
Please note that first time users may experience slow loads for the first time they run applications.

iPad\iPhone Platform

Before logging into the portal you must have **Microsoft Remote Desktop app** installed on your iPad/iPhone.

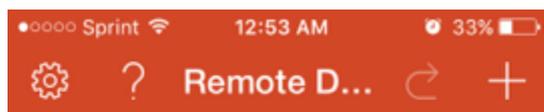
Go to the **app store** on your iPad/iPhone and then click on the search bar in the top right corner of the screen that opens. Search **Remote Desktop**.

Install the **Microsoft Remote Desktop App** and once it is ready, open the app



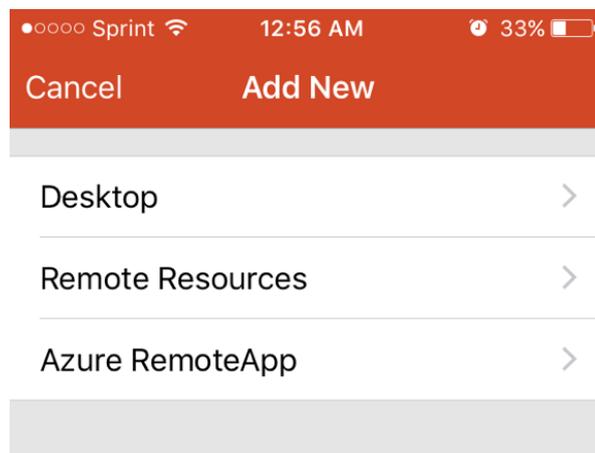
iTunes App Store – Microsoft Remote Desktop

Now that the Remote Desktop app is installed, you can add the remote resource. Tap on + in the top right hand corner and then click **Remote Resource**



It's lonely here.

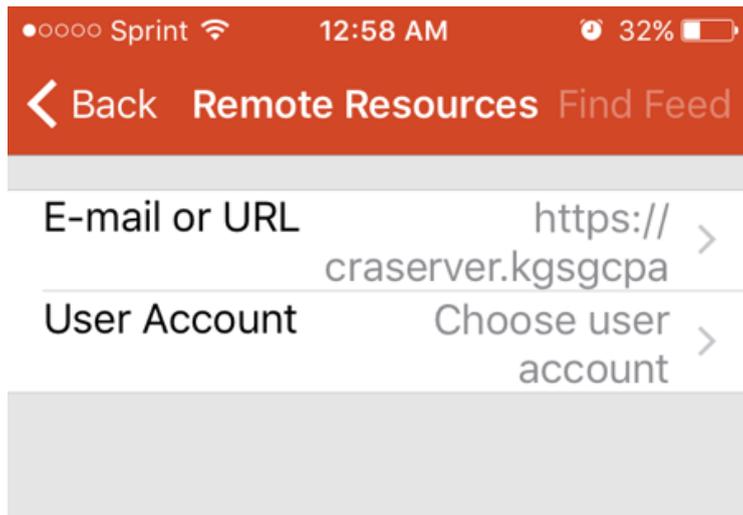
To get started, add the remote desktop that you want to connect to using this device. You can also add remote resources to work with apps and desktops your administrator has set up for you.



Remote Desktop app - + in top right corner and Add New Remote Resources

Type the following information to gain connection.

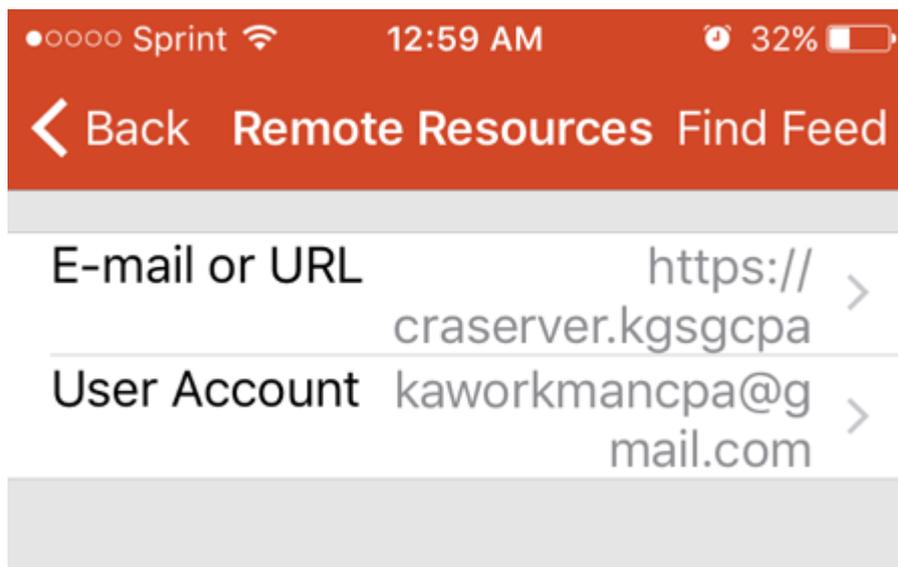
URL: <https://craserver.kgsgcpa.com/rdweb/feed/webfeed.aspx>



Add remote resource URL and User Account

Then enter your username and password under User Account. The login details are the email address and password provided during setup.

When the information has been entered, click Find Feed in the top right corner



Click Find Feed in the top right corner

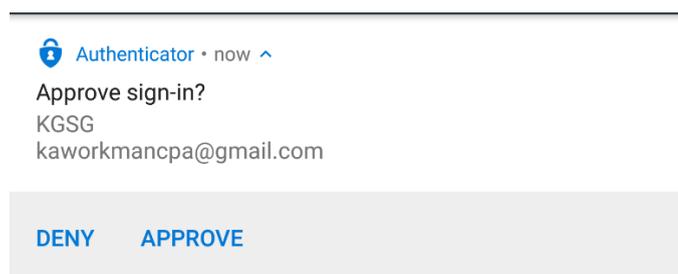
If done correctly, a list of apps will appear. If you don't see the list, make sure you are connected to the internet try to input your information again.



Available applications

Now you will have access to any applications that are currently available to your account. Simply click on the application you wish to use and it will run after a short loading screen.

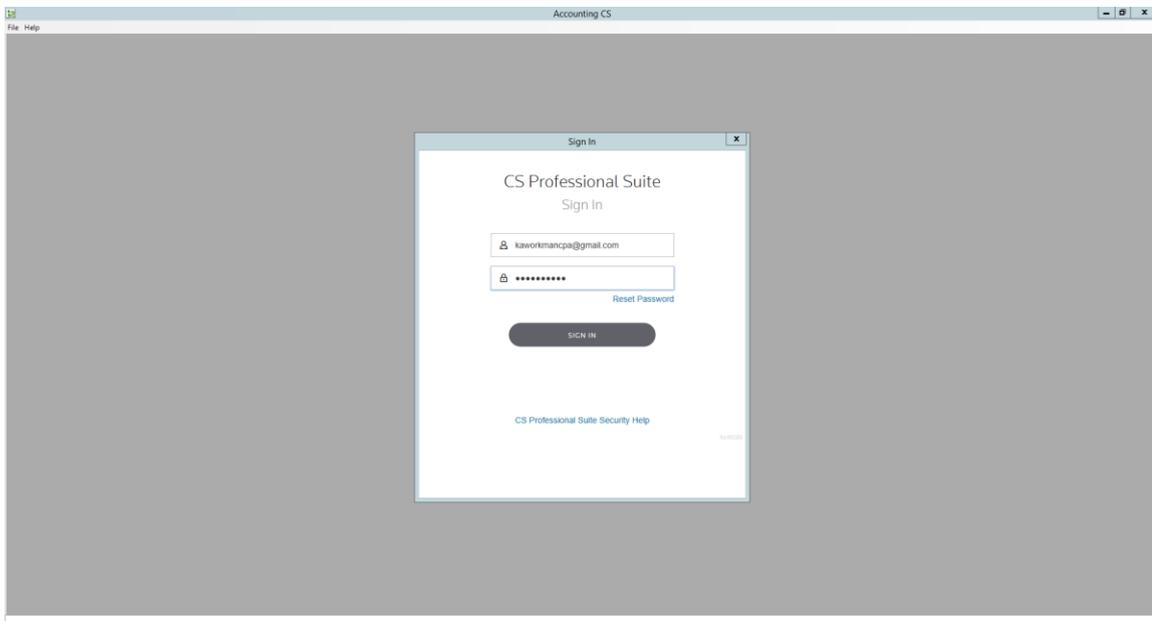
At this point you should receive a notification from the **Microsoft Authenticator** app (or text message/phone call if either of those options were selected) on your iOS or Android device to approve your sign-in. Tap “Approve” on your device to complete the connection.



Microsoft Authenticator approval notification

After successfully connecting, you will be presented with the requested application. Enter your logon credentials (**NetClient CS credentials for Accounting CS Client Edition**).

If this is your first time accessing the Accounting CS Client Edition software, please see the initial setup instructions on page 26.



Accounting CS Client version

This concludes the remote access instructions for the iPhone/iPad Platform.

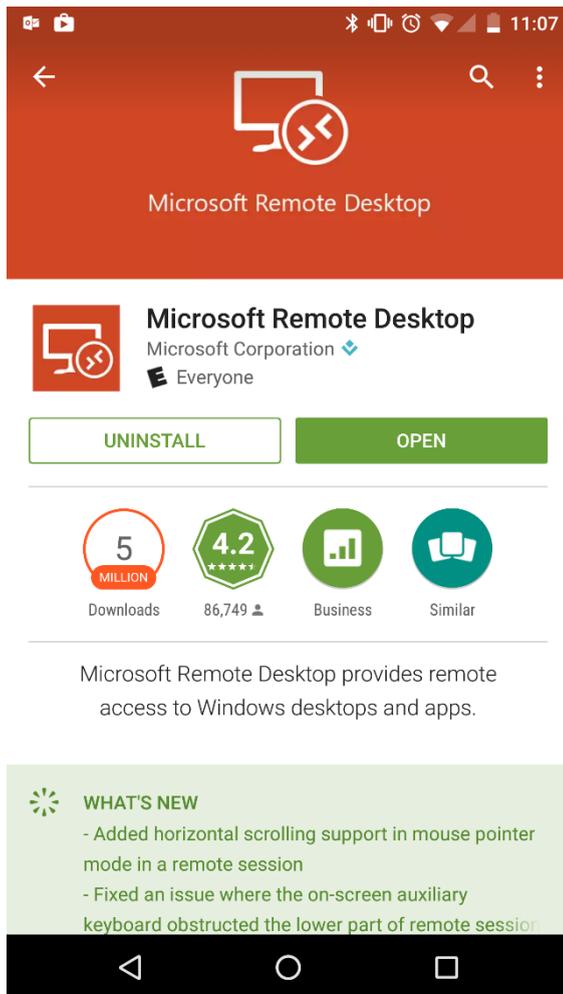
Please note that first time users may experience slow loads for the first time they run applications.

Android Operating system (based on Android version 7.0)

Before logging into the portal you must have **Microsoft Remote Desktop app** installed on your Android Device.

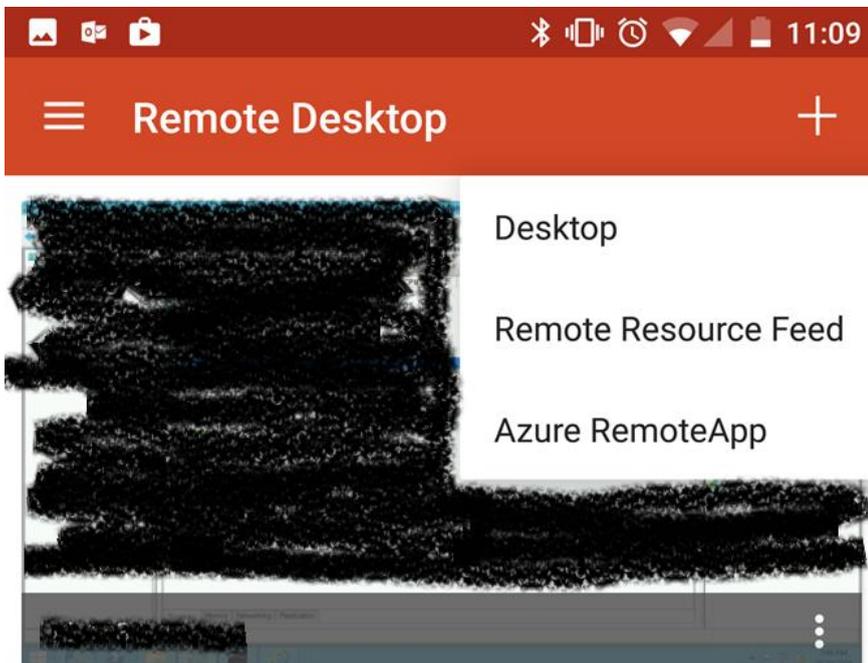
Go to the **Google Play Store** on your Android device and then click on the search bar in the top right corner of the screen that opens. Search **Remote Desktop**.

Install the **Microsoft Remote Desktop App** and once it is ready, open the app



Google Play Store – Microsoft Remote Desktop

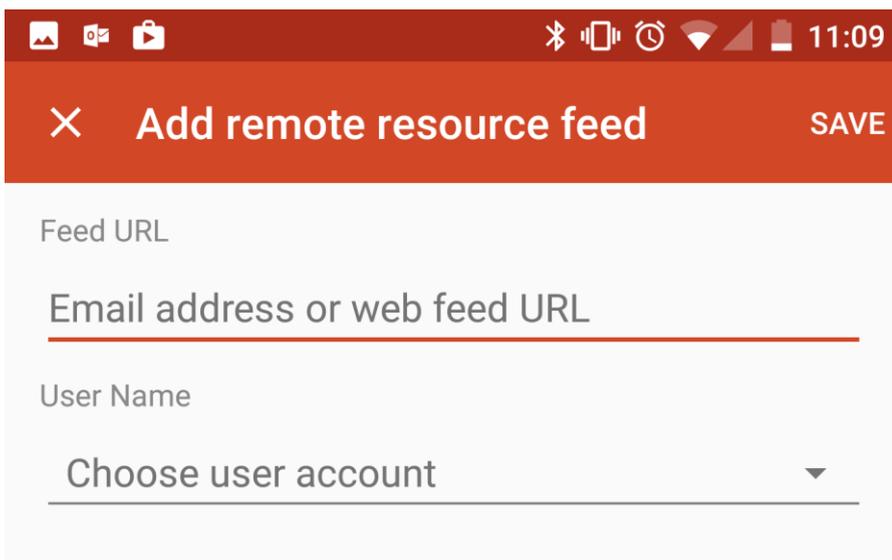
Now that the **Microsoft Remote Desktop App** is installed, you can now add the remote resource. Tap on + in the top right hand corner and then click **Remote Resource**



Remote Desktop app - + in top right corner and Add New Remote Resources

Type the following information to gain connection.

URL: <https://craserver.kgsgcpa.com/rdweb/feed/webfeed.aspx>

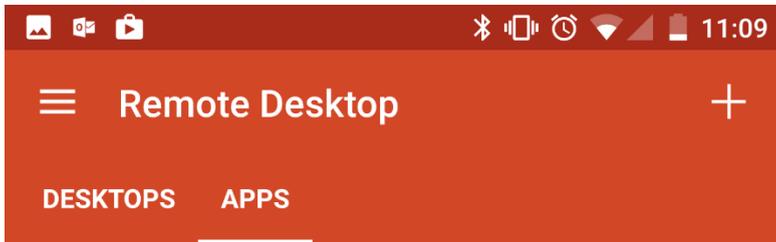


Add remote resource URL and User Account

Then enter your username and password under User Account. The login details are the email address and password provided during setup.

When the information has been entered, click Save in the top right corner

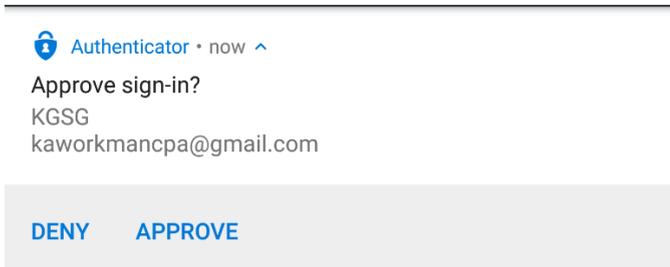
If done correctly, a list of apps will appear. If you don't see the list, make sure you are connected to the internet try to input your information again.



Available applications

Now you will have access to any applications that are currently available to your account. Simply click on the application you wish to use and it will run after a short loading screen.

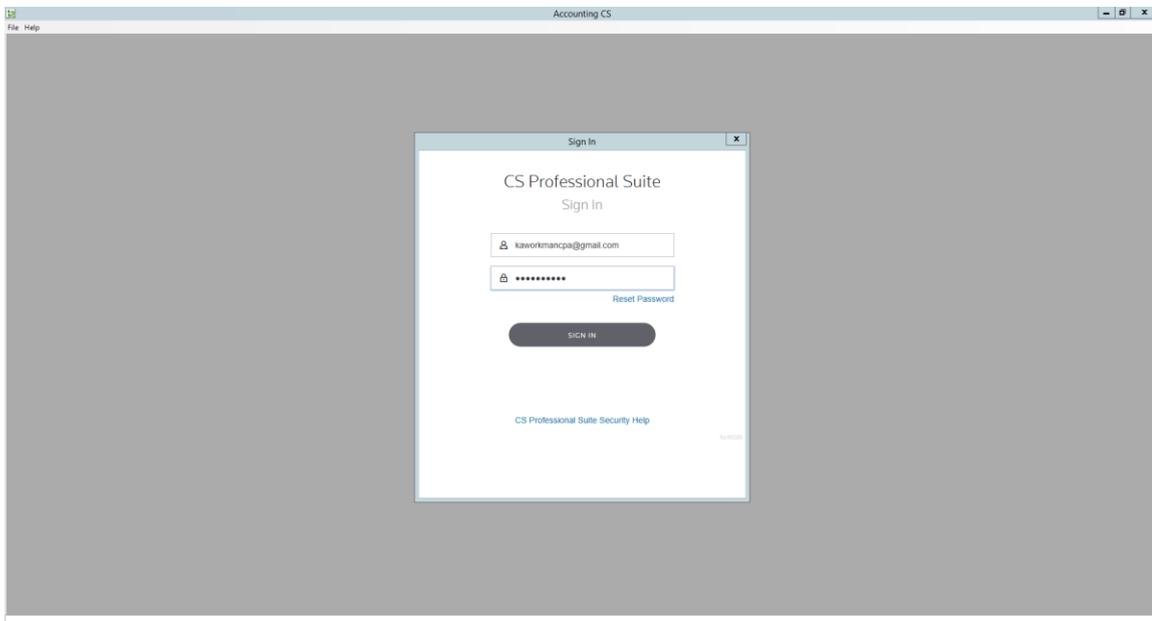
At this point you should receive a notification from the **Microsoft Authenticator** app (or text message/phone call if either of those options were selected) on your iOS or Android device to approve your sign-in. Tap “Approve” on your device to complete the connection.



Microsoft Authenticator approval notification

After successfully connecting, you will be presented with the requested application. Enter your logon credentials (**NetClient CS credentials for Accounting CS Client Edition**).

If this is your first time accessing the Accounting CS Client Edition software, please see the initial setup instructions on page 26.



Accounting CS Client version

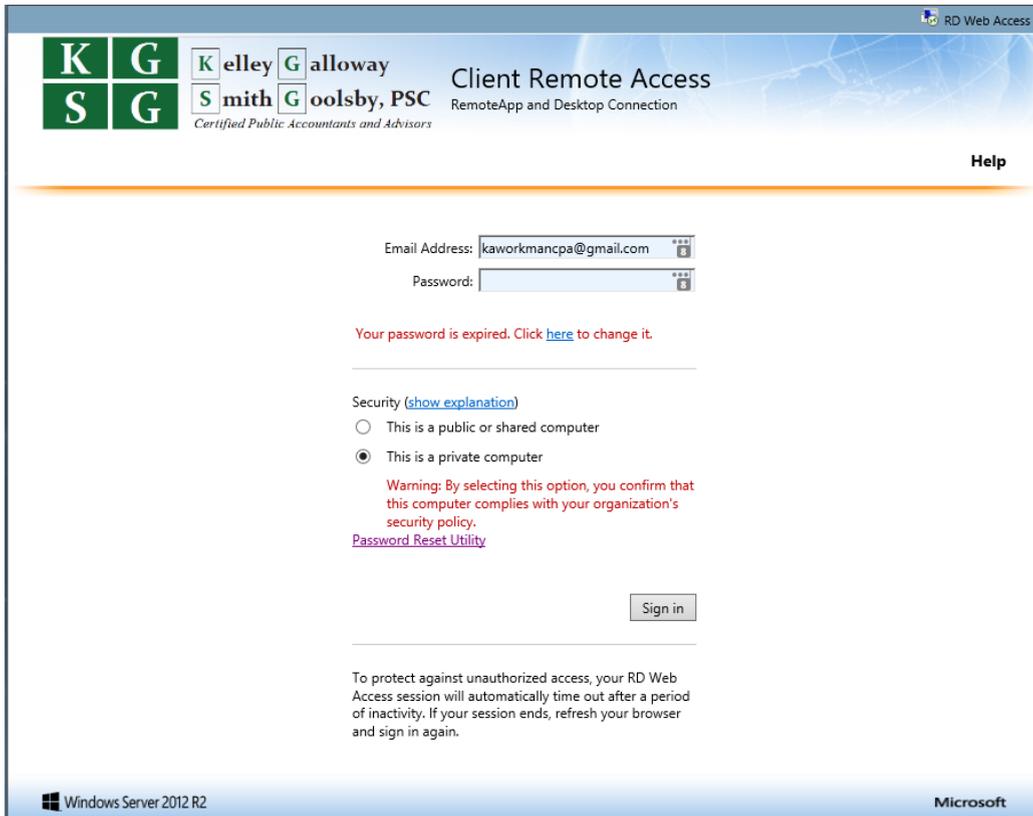
This concludes the remote access instructions for the Android Platform.

Please note that first time users may experience slow loads for the first time they run applications.

Password Reset

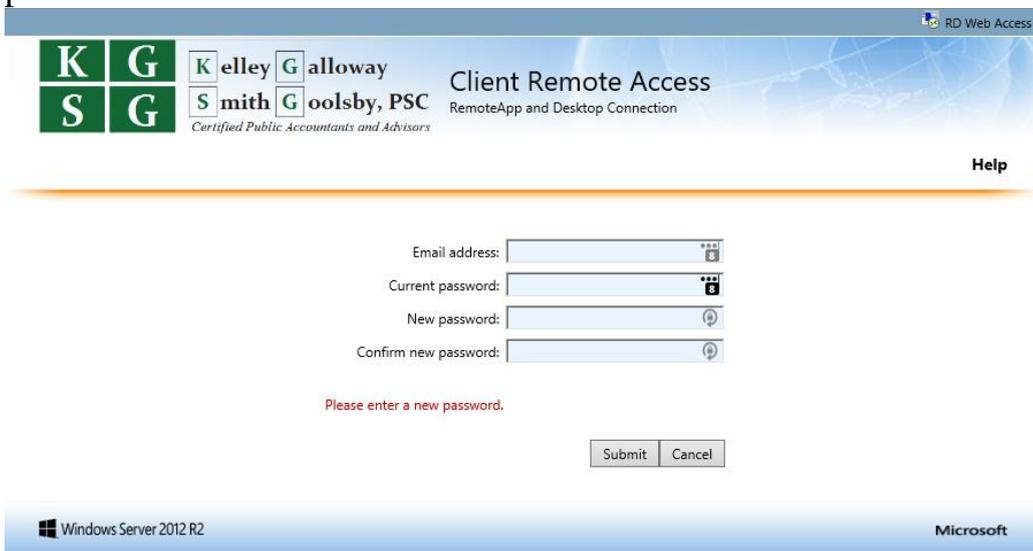
If your password has expired, you will be required to change it. Upon clicking “Sign in” you will receive a notification that your password has expired. Click on the provided link to change the password.

You may also change your password at any time by clicking the “Password Reset Utility” link at <https://craserver.kgsgcpa.com>.



Password is expired notification

Enter your email address and current password on the provided lines and enter a new password.



Password change webpage

Passwords have the following requirements:

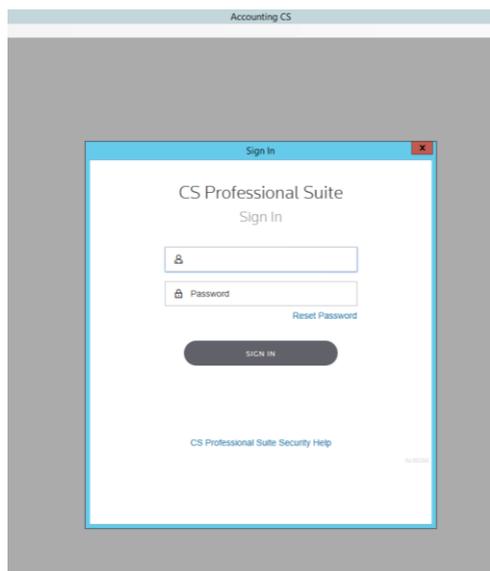
- Changed at least every 365 days.
- Have a minimum length of 9 alphanumeric characters
- Not contain the user's account name or parts of the user's full name that exceed two consecutive characters
- Contain characters from three of the following four categories:
 - English uppercase characters (A through Z)
 - English lowercase characters (a through z)
 - Base 10 digits (0 through 9)
 - Non-alphabetic characters (for example, !, \$, #, %)
- Passwords must not be shared with anyone

These requirements are in effect to protect your data.

Accounting CS Client Edition Initial Login

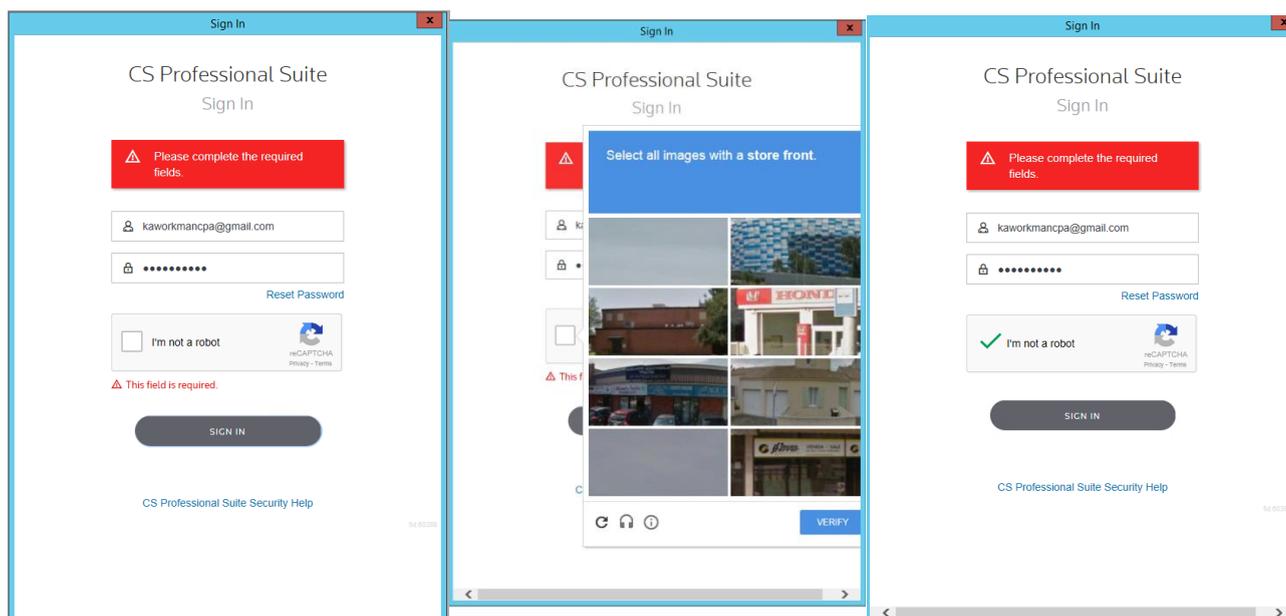
Upon your first time accessing Accounting CS Client Edition, you will be required to setup a password specifically for Accounting CS. Afterwards, the password can be saved, so you will not be prompted for it again.

Once Accounting CS has loaded (see Table of Contents for access instructions on your specific platform), you will be presented with a CS Professional Suite login prompt. At this prompt, **you will use your NetClient CS portal username and password.** Subsequent logins will only require this username and password.



CS Professional Suite login prompt – Use NetClient CS portal credentials

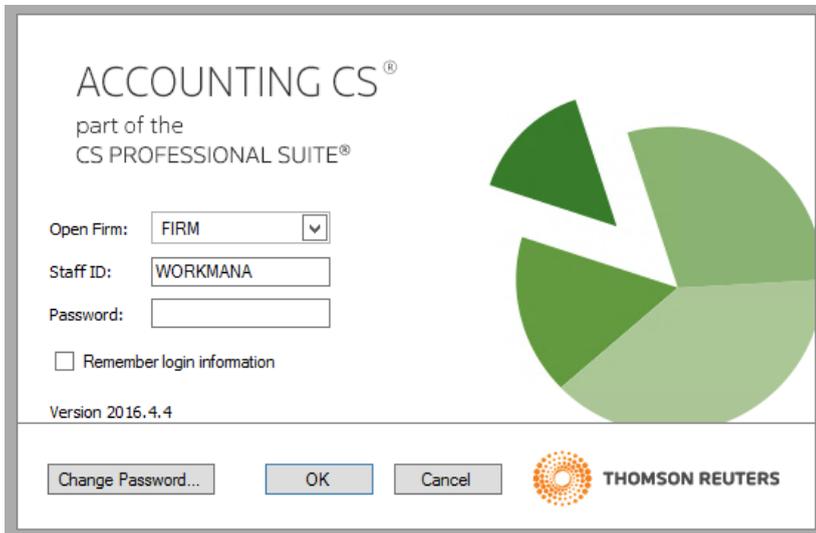
Upon entering your **NetClient CS portal username and password**, you may be presented with a reCAPTCHA prompt. Please click the “I’m not a robot” box and answer the presented questions.



reCAPTCHA prompt and related confirmation questions

Upon successful confirmation and sign in, you will be presented with a separate Accounting CS logon prompt. This prompt can be avoided in the future by clicking the “Remember login information.”

Please enter the Accounting CS Staff ID you were provided at initial setup but leave the password line blank. Then click OK.



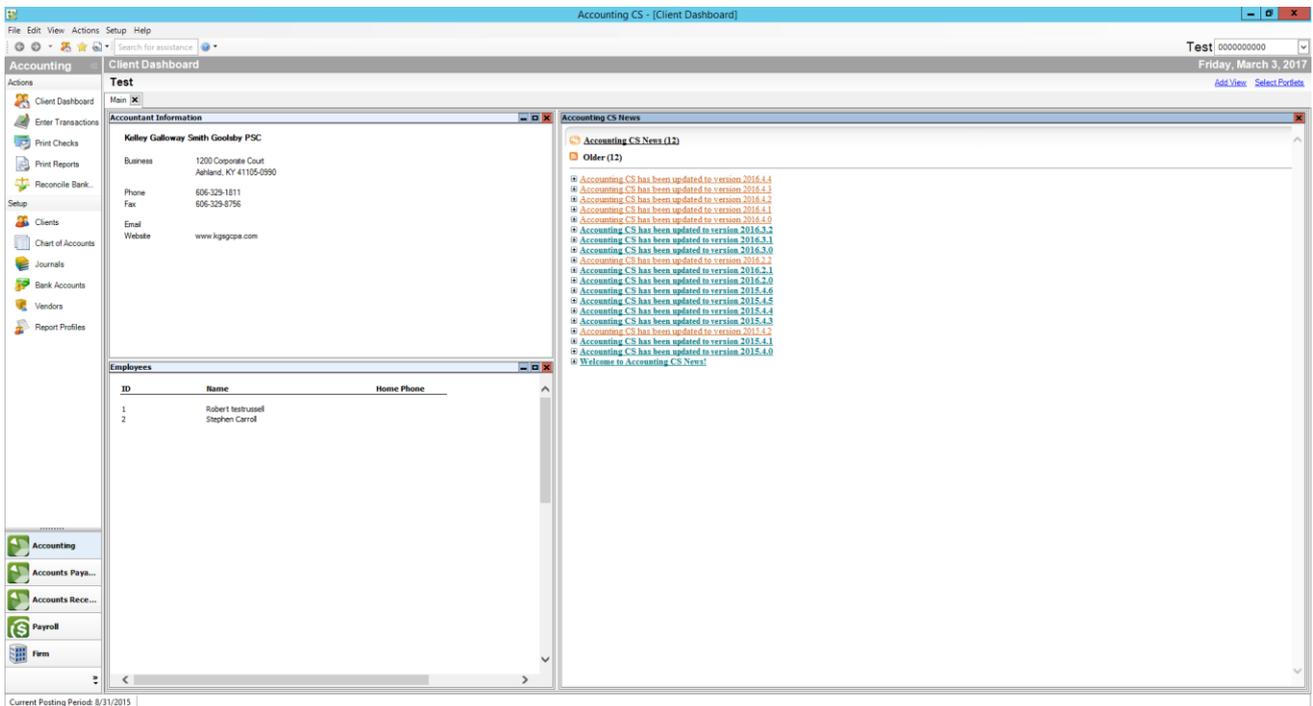
Accounting CS logon prompt (will bypassed in the future)

You will then be prompted to setup a new password. Please enter your chosen password on the “New password” and “Confirm new password” lines. (This password has no requirements and will be bypassed in the future by selecting “Remember login information.”)



New password prompt

Upon successful login, you will be presented with the Accounting CS Client Dashboard



Accounting CS Client Dashboard

If you were not given the opportunity to select “Remember login information” at the Accounting CS Client logon prompt, you may select it upon your next login attempt.