

Estate Valuations & Pricing Systems, Inc.

EVP Office Installation Under Citrix

Overview

This document outlines the installation of EVP Systems' EVP Office suite of Windows applications under a Citrix environment.

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Prerequisites

The following are the recommended prerequisites for installation of EVP Office under Citrix.

Installation Media

EVP Systems offers two installation media types for deployment on Windows operating systems. The first being an Executable, or EXE. A secondary file is also available being a Microsoft Software Installer, or MSI. For Virtual Desktop Infrastructure (commonly known as VDI) deployments such as Citrix, it is recommended to utilize MSI packages to ensure seamless deployment into VDI images. While an EXE and MSI act similarly, an MSI provides a direct installation method utilizing the Windows Installer Service. Using an MSI allows both temporary elevation privileges for the installer package, as well as storing any initialization files (commonly known as INI files) to be placed in the system directory.

Download location: <https://www.evspys.com/software>

Download link: “MSI Installer”

Download file: EVP Office X.Y.Z.msi

Default installation path: C:\Program Files (x86)\EVP Systems

EVP Office installs to the local Windows drive as a 32-bit x86 application.

OS Recommendations

EVP Systems has validated current-generation Windows Server and Windows Workstation operating systems for use with the EVP Office. The following Windows operating systems have specifically been validated as of EVP Office 9.0.3 for use with Citrix:

Windows Server 2019 1809

Windows Server 2022 21H2

Windows Workstation 10 22H2

Windows Workstation 11 22H2

Other versions of the operating systems may work, but have not been explicitly validated.

Resource Recommendations

EVP Systems has validated that EVP Office can be utilized on operating systems with varying specifications. EVP Office itself requires little in reference to memory allocation, running as low as 8MB of shared memory.

Citrix Recommendations

The following Citrix VDA versions have been validated for EVP Office:

Citrix Virtual Apps and Desktops 2305 (Current Release)
Citrix Virtual Apps and Desktops 2203 (Long-Term Service Release)

Additionally, Citrix VDA management has been validated in both Citrix management offerings including its Cloud Management solution as well as its On-Premises VDI solution:

Citrix Cloud Management

Citrix Virtual Apps and Desktops 2305 (Current Release)
Citrix Virtual Apps and Desktops 2203 (Long-Term Service Release CU3)

Citrix On-Prem Deployment

Citrix Virtual Apps and Desktops 2305 (Current Release)
Citrix Virtual Apps and Desktops 2203 (Long-Term Service Release CU3)

Citrix Workspace App

Citrix Workspace App 2303 (Current Release)
Citrix Workspace App 2203 (Long-Term Service Release CU3)

Persistency Recommendations

The two common deployments are persistent and non-persistent machines. A persistent session entitles a user to one specific resource for workloads, and all personality data (or profile data) is stored directly to the machine for use daily. A non-persistent session entitles a user to multiple resources for workloads, and a user's personality data is copied to and from the workload for integration into applications and/or desktops. When deploying at scale or in small quantities, both solutions have benefits. EVP Systems has validated EVP Office usage for both persistent and non-persistent workloads.

When utilizing non-persistent workloads, it is recommended to utilize a profile management solution such as Citrix UPM, Liquidware ProfileUnity, Microsoft FSLogix or VMware Dynamic Environment Manager. Profile management should copy data from these locations and place them outside of the workload on logoff or when not in use:

User Registry Data

HKCU\Software\EVP Systems

User Application Data / Software Registration Data

%APPDATA%\EVP Systems\
 estates.ini, gift32.ini, cost32.ini, cap32.ini (Per-user
 configuration data)

evps.dt0 (Account Information File, see the EVP Office Installation Tutorial – <https://www.evpsys.com/support/tutorials/evpoffice/installation> – for details)

For persistent workloads, while not required, can be backed up by various backup methods or solutions to ensure in the event of a failure that any/all customizations can be restored for a user on a new VDI workload.

Installation Guide

Citrix Virtual Apps and Desktops

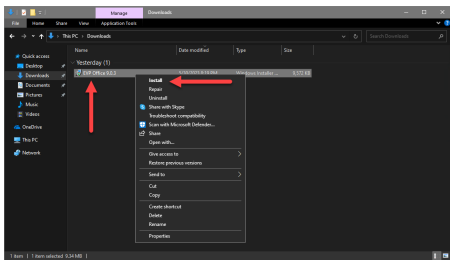
The following deployment methods have been validated by EVP Systems for deploying EVP Office into a Citrix Virtual Apps and Desktops workload running on Windows 10, Windows 11, Windows Server 2019 or Windows Server 2022. Both Windows Workstation, Windows Server, and Citrix Virtual Delivery Agents support persistent and non-persistent configurations, and EVP Office has been validated to work on either OS or VDA version shown prior. (See Prerequisites, above.)

EVP Software offers additional installation customization through use of command line switches and system wide INI files, for details on these customizations, please reach out to EVP Support at support@evpsys.com or (818) 313-6300. The following documentation is available as a recommendations and standardization guide for Citrix deployments, however each Citrix deployment is unique and additional configuration may be required.

EVP Office Installation (MSI)

This is the preferred method of deployment/installation.

Command Line Method

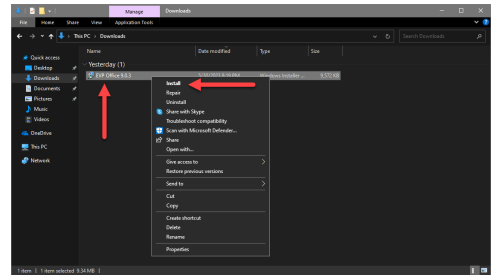
Step	Instruction	Visual Aid
1	<p>Launch <code>cmd.exe</code> as Administrator</p> <p>Locate EVP Office <code>X.Y.Z.msi</code></p> <p>Enter <code>msiexec /i "<path-to-msi>\EVP Office <X.Y.Z>.msi" /qn</code></p> <p>The installation will run silently and complete</p>	

GUI Method

Step	Instruction	Visual Aid
------	-------------	------------

1 Right click EVP Office X.Y.Z.msi

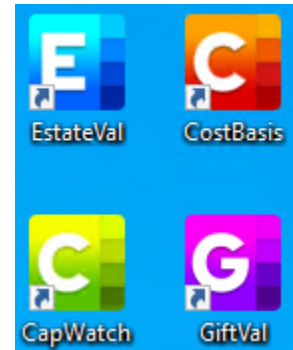
Click Install



2 The MSI will auto install with default configuration settings

Installation will complete and close automatically

Application shortcuts will appear on desktop and Start Menu



EVP Office Installation (EXE)

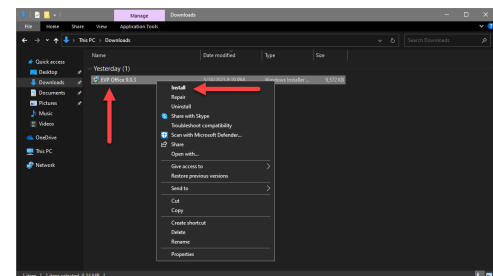
The EXE will require input from an Administrator account and may require UAC permissions to complete installation.

Step **Instruction**

Visual Aid

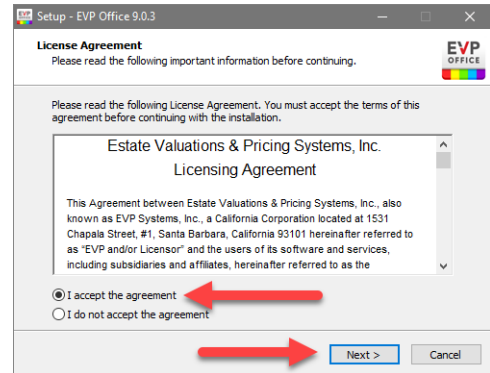
1 Right click EVP Office X.Y.Z Setup Wizard.exe

Click Run as administrator



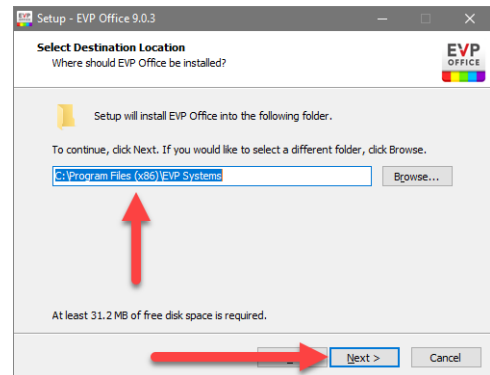
2 Click I accept the agreement

Click Next >



3 Verify the installation path

Click Next >

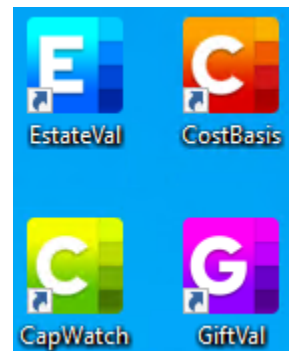


4 Click Finish



5 Installation will complete and close automatically

Application shortcuts will appear on desktop and Start Menu



Non-Persistent Workloads

Machine Creation Services (MCS)

Citrix Machine Creation Services (MCS) simplifies the creation and management of virtual machines (VMs) in a virtual desktop infrastructure. It uses a master image as a template to create multiple identical VMs and leverages cloning technology for rapid deployment and scalability. MCS provides features like automatic provisioning, image updates, and integration with Citrix Provisioning Services for optimized resource utilization. Overall, MCS streamlines VM creation and management in a virtual desktop environment.

Provisioning Services (PVS)

Citrix Provisioning Services (PVS) is a software solution that centrally manages and delivers virtual desktops and applications. It separates the operating system and applications from hardware, allowing a single instance to be shared across multiple devices. By streaming a master image over the network, PVS simplifies management, reduces storage needs, and enables rapid provisioning and scalability in virtual desktop infrastructure (VDI) deployments.

Master Image Customization

In Citrix, a master image is a pre-configured template virtual machine used as a starting point for creating multiple virtual desktops or application sessions. It contains the operating system, applications, and settings that will be deployed to end-user environments. By using master images, organizations can efficiently provision and manage virtualized environments while ensuring consistency and control.

EVP Systems has validated that EVP Office is compatible with such non-persistent workload solutions as Citrix MCS or Citrix PVS. When utilizing either solution, it is recommended to prep the master image with a centralized registration file within EVP Office to ensure any/all entitled users of the suite will not be prompted for activation.

When utilizing either Windows Server (2019 or 2022) or Windows Workstation (10 or 11), the default locations remain the same between each operating system, and the registration data file created during initial install and activation also remains the same. The following steps can be utilized on either Workstation or Server operating system, in a non-persistent workload solution such as Citrix MCS or Citrix PVS:

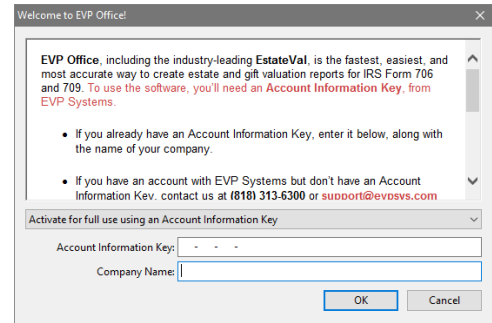
Step	Instruction	Visual Aid
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1 Launch EstateVal

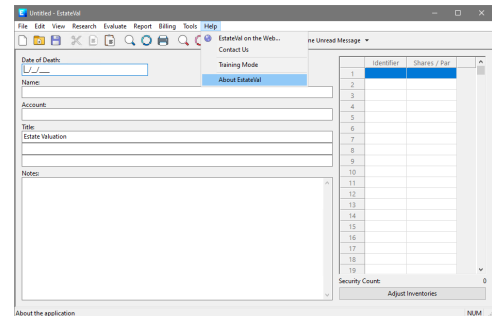
Enter your Account Information Key

Enter your Company Name

Click OK



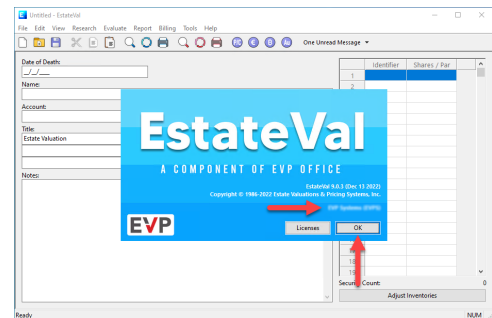
2 Click Help → About EstateVal



3 Validate your Company Name and Account Code

Click OK

Close EstateVal



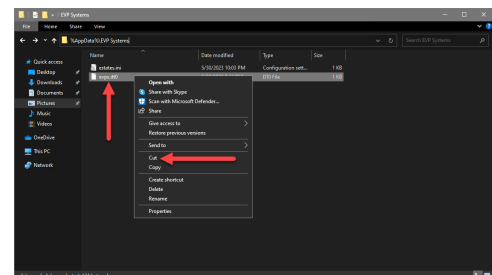
4 Launch Explorer

Browse to %APPDATA%\EVP Systems\

Locate evps.dt0

Right click evps.dt0

Click Cut

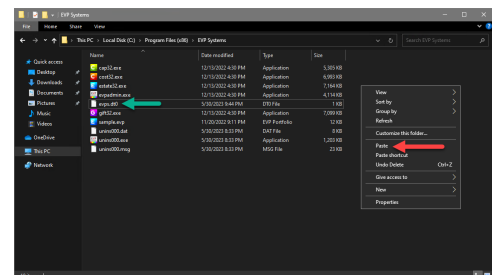


5 Browse to C:\Program Data (x86)\EVP Systems

Right click in the directory window

Click Paste

Validate evps.dt0 copied correctly



Relaunch EstateVal

Confirm EstateVal is properly licensed (see above)

Close EstateVal

Publishing Guide

Definitions

Citrix Cloud

Citrix Cloud Management is a cloud-based platform that centralizes the management of Citrix products and services. It simplifies administration, provides scalability, automates updates, and offers monitoring and analytics capabilities for efficient Citrix deployment management.

<https://docs.citrix.com/en-us/citrix-cloud/citrix-cloud-overview.html>

Citrix On-Premises

Much like Citrix Cloud, Citrix On-Premises is a more traditional management pane for Citrix environments where infrastructure resides within the customer data center. Additional components required are SQL databases, management controllers, monitoring controllers, and resource aggregators.

<https://docs.citrix.com/en-us/citrix-virtual-apps-desktops/technical-overview.html>

Machine Catalog

A Citrix Machine Catalog is a collection of virtual machines (VMs) created from a master image. It helps manage and deliver virtual desktops and applications to end-users. Machine Catalogs define VM properties and allow for scalability and efficient resource allocation. When deploying workloads, a machine catalog is generally defined by Persistent or Non-Persistent, Workstation or Server operating system types.

<https://docs.citrix.com/en-us/citrix-virtual-apps-desktops/install-configure/machine-catalogs-create.html>

Delivery Group

A Citrix Delivery Group is a way to organize and manage applications and desktops for delivery to users in a Citrix Virtual Apps and Desktops environment. It simplifies administration, allows for centralized control, and enables efficient resource allocation. A machine catalog is linked to a delivery group for aggregating pools of applications and desktops across VMs and hypervisors.

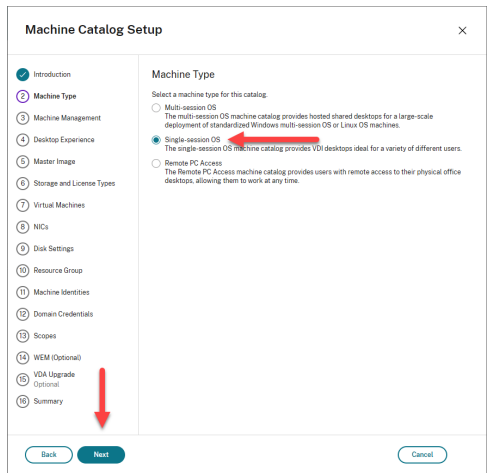
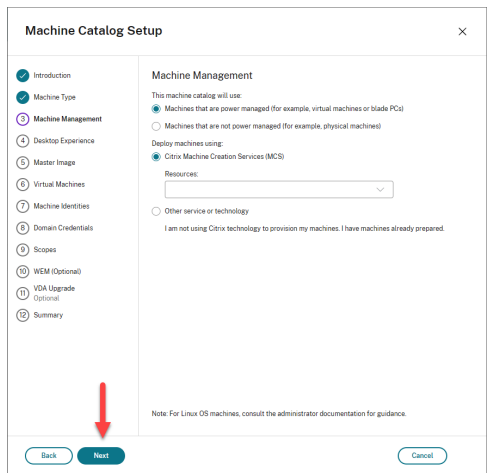
<https://docs.citrix.com/en-us/citrix-virtual-apps-desktops/install-configure/delivery-groups-create.html>

Machine Catalogs

Windows Workstation (10/11)

Citrix Cloud

This is an example of how to deploy a “Single-session OS” catalog.

Step	Instruction	Visual Aid
1	<p>Login to Citrix Cloud Subscription</p> <p>Navigate to DaaS</p> <p>Click Machine Catalogs</p> <p>Click Create Machine Catalog</p> <p>Click Next</p> <p>Select Single-session OS</p> <p>Click Next</p>	 <p>The screenshot shows the 'Machine Catalog Setup' window. On the left, a list of steps includes Introduction, Machine Type (highlighted), Machine Management, Desktop Experience, Master Image, Storage and License Types, Virtual Machines, NICs, Disk Settings, Resource Group, Machine Identities, Domain Credentials, Scopes, WEM (Optional), VDA Upgrade (Optional), and Summary. On the right, under 'Machine Type', three options are listed: Multi-session OS, Single-session OS (selected), and Remote PC Access. A red arrow points to the 'Next' button at the bottom.</p>
2	<p>Select Machine Management</p> <p><i>Power managed is generally hosted by a hypervisor</i></p> <p><i>Not power managed is generally RemotePC or VMs managed by a hypervisor connector</i></p> <p>Select Deploy machines using</p> <p><i>Citrix Machine Creation Services (MCS) utilizes hypervisor integration to deploy using a master image and a snapshot</i></p> <p><i>Select an existing Hosting Connection if utilizing MCS</i></p> <p><i>Other Service or technology can be used for integration with Citrix Provisioning Services (PVS), manual VM deployment, or other deployment methods</i></p>	 <p>The screenshot shows the 'Machine Catalog Setup' window at the 'Machine Management' step. The left sidebar is the same as in Step 1. On the right, under 'Machine Management', two options are shown: 'Machines that are power managed (for example, virtual machines or blade PCs)' (selected) and 'Machines that are not power managed (for example, physical machines)'. Below, under 'Deploy machines using:', 'Citrix Machine Creation Services (MCS)' is selected. A red arrow points to the 'Next' button at the bottom.</p>

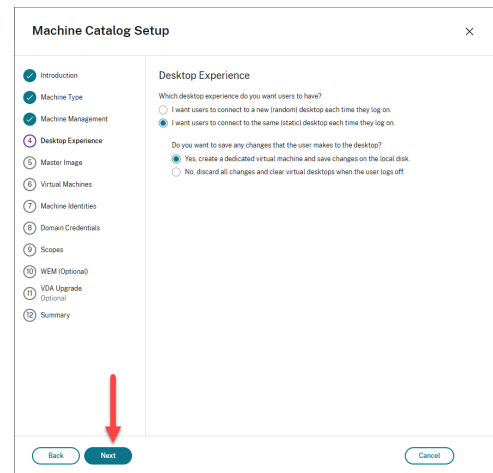
Click Next

3 Select Desktop Experience

Random desktop is considered a non-persistent pooled workload, a profile management solution is generally utilized with this option, a user gets any desktop available within the catalog

Static desktop is a more traditional desktop, and a single user is assigned to a single desktop workload

If using static desktop, options are available to save changes throughout reboots, or discard all changes and revert on logoff



Click Next

4 Remaining steps vary based on deployment type

Complete remaining tasks to build machine catalog

Citrix On-Premises

This is an example of how to deploy a “Single-session OS” catalog.

Step	Instruction	Visual Aid
1	Launch Citrix Studio	
	Navigate to Machine Catalogs	
	Click Create Catalog (actions pane)	
	Click Next	
	Click Single-session OS	
	Click Next	

2 Select Machine Management

Power managed is generally hosted by a hypervisor

Not power managed is generally RemotePC or VMs not managed by a hypervisor connector

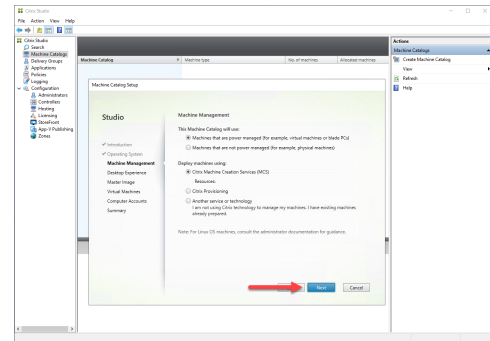
Select Deploy machines using

Citrix Machine Creation Services (MCS) utilizes hypervisor integration to deploy using a master image and a snapshot

Select an existing Hosting Connection if utilizing MCS

Other Service or technology can be used for integration with Citrix Provisioning Services (PVS), manual VM deployment, or other deployment methods

Click Next



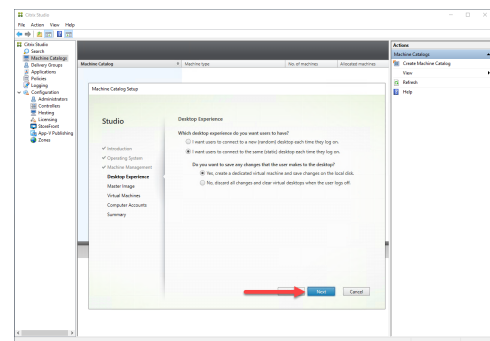
3 Select Desktop Experience

Random desktop is considered a non-persistent pooled workload, a profile management solution is generally utilized with this option, a user gets any desktop available within the catalog

Static desktop is a more traditional desktop, and a single user is assigned to a single desktop workload

If using static desktop, options are available to save changes throughout reboots, or discard all changes and revert on logoff

Click Next



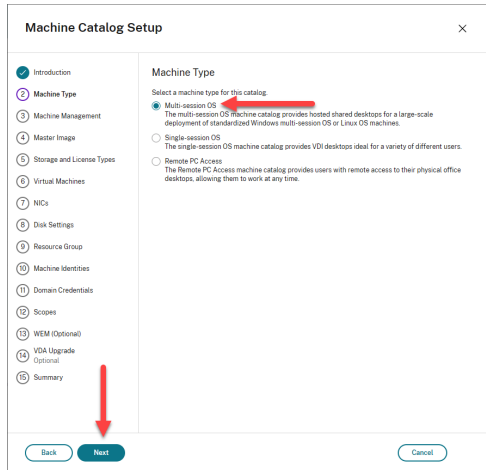
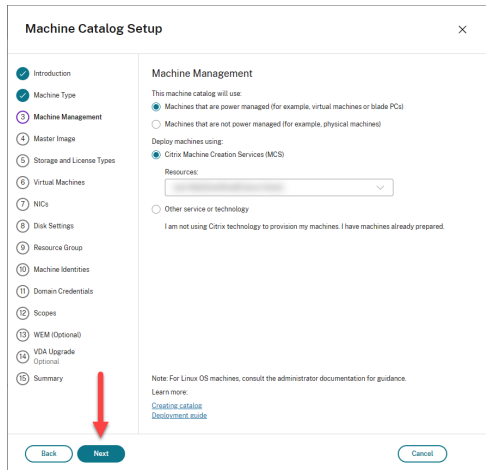
4 Remaining steps vary based on deployment type

Complete remaining tasks to build machine catalog

Windows Server (2019/2022)

Citrix Cloud

This is an example of how to deploy a “Multi-session OS” catalog.

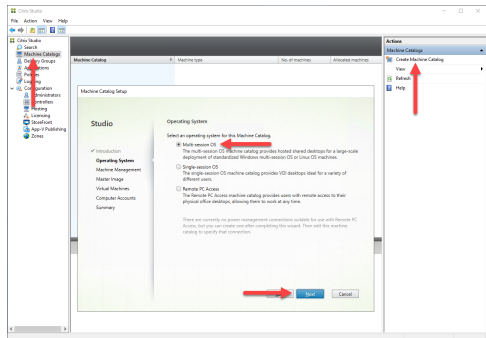
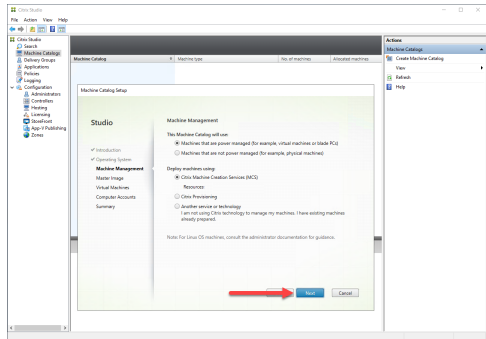
Step	Instruction	Visual Aid
1	<p>Login to Citrix Cloud Subscription</p> <p>Navigate to DaaS</p> <p>Click Machine Catalogs</p> <p>Click Create Machine Catalog</p> <p>Click Next</p> <p>Select Multi-session OS</p> <p>Click Next</p>	
2	<p>Select Machine Management</p> <p><i>Power managed is generally hosted by a hypervisor</i></p> <p><i>Not power managed is generally RemotePC or VMs that are not managed by a hypervisor</i></p> <p>Select Deploy machines using</p> <p><i>Citrix Machine Creation Services (MCS) utilizes hypervisor integration to deploy using a master image and a snapshot</i></p> <p><i>Select an existing Hosting Connection if utilizing MCS</i></p> <p><i>Other Service or technology can be used for integration with Citrix Provisioning Services (PVS), manual VM deployment, or other deployment methods</i></p> <p>Click Next</p>	
3	<p>Remaining steps vary based on deployment</p>	

type

Complete remaining tasks to build machine catalog

Citrix On-Premises

This is an example of how to deploy a “Multi-session OS” catalog.

Step	Instruction	Visual Aid
1	Launch Citrix Studio Navigate to Machine Catalogs Click Create Catalog (actions pane) Click Next Click Multi-session OS Click Next	
2	Select Machine Management <i>Power managed is generally hosted by a hypervisor</i> <i>Not power managed is generally RemotePC or VMs that are not managed by a hypervisor</i> Select Deploy machines using <i>Citrix Machine Creation Services (MCS) utilizes hypervisor integration to deploy using a master image and a snapshot</i> <i>Select an existing Hosting Connection if utilizing MCS</i> <i>Other Service or technology can be used for integration with Citrix Provisioning Services (PVS), manual VM deployment, or other deployment methods</i> Click Next	
3	<i>Remaining steps vary based on deployment</i>	

type

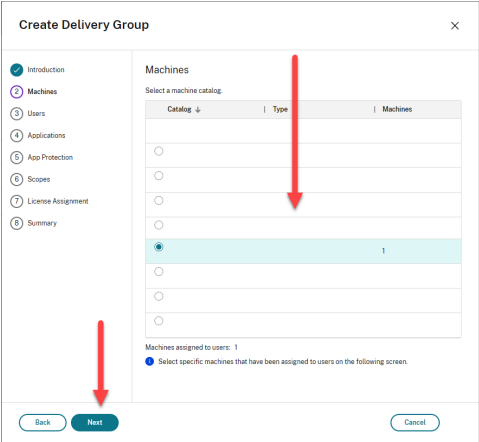
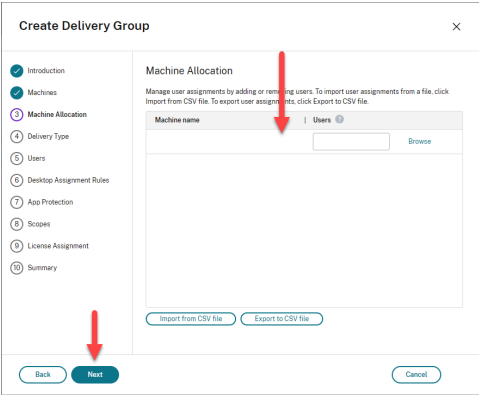
Complete remaining tasks to build machine
catalog

Delivery Groups

Windows Workstation (10/11)

Citrix Cloud

This is an example of how to deploy a published desktop.

Step	Instruction	Visual Aid
1	<p>Login to Citrix Cloud Subscription</p> <p>Navigate to DaaS</p> <p>Click Delivery Groups</p> <p>Click Create Delivery Group</p> <p>Click Next</p> <p>Select Machine Catalog (created prior)</p> <p>Click Next</p>	
2	<p>Assign Machine to User(s) (<i>may be defined in MC prior</i>)</p> <p>Click Next</p> <p>Select Desktops (<i>default option when Windows 10/11 detected</i>)</p> <p>Click Next</p>	

3 Select **Leave user management to Citrix Cloud**

(This is recommended but not required, select which user management best matches your organization.)

Click Next

Create Delivery Group

Introduction
Machines
Machine Allocation
Delivery Type
Users
App Protection
Scopes
License Assignment
Summary

Users

Specify who can use the applications and desktops in this delivery group. You can assign users and user groups who log on with valid credentials.

☐ Allow any authenticated users to use this delivery group

☒ Leave user management to Citrix Cloud. This makes the delivery group available as a Library offering you can assign to users.

☐ Restrict use of this delivery group:

To let non-Active Directory users (for example, Azure AD and Okta users) launch Active Directory joined machines, select the following option:

☐ Allow users not in Active Directory to use this delivery group

Back Next Cancel

4 Check **Anti-keylogging** (optional, recommended for security purposes)

Check **Anti-screen-capturing** (optional, recommended for security purposes)

Click Next

Select **Scope(s)**

Click Next

Select **License Assignment** (based on your Citrix subscription type)

Click Next

Create Delivery Group

Introduction
Machines
Machine Allocation
Delivery Type
Users
App Protection
Scopes
License Assignment
Summary

App Protection

App Protection, an add-on feature for the Citrix Workspace app, provides enhanced security for Citrix published apps and desktops. The feature provides anti-keylogging and anti-screen-capturing capabilities for client sessions, helping protect data from keyloggers and screen scrapers. Before using the feature, make sure that the product's prerequisites are met.

Choose what to enable for this delivery group:

☒ **Anti-keylogging**
If enabled, keyloggers see encrypted keystrokes. This feature is active only when a protected window is in focus.

☒ **Anti-screen-capturing**
If enabled, enforce content protection for screen captures.

- On Windows and macOS, only the window of the protected content is blank. This feature is active when a protected window is not minimized.
- On Linux, the entire capture is blank. This feature is active whether a protected window is minimized or not.

Back Next Cancel

5 Enter **Delivery Group Name** as “EVP Desktop”

Enter **Display Name** as “EVP Desktop”

Click Finish

Create Delivery Group

Introduction
Machines
Machine Allocation
Delivery Type
Users
App Protection
Scopes
License Assignment
Summary

Summary

Machine catalog:	MC-IVLAB-W10-Persistent
Machine type:	Single-session OS
Allocation type:	Static
Machines added:	VIALAB-ABCTWOPR01 1 assigned to users
Delivery type:	Desktops
Users:	Managed by Citrix Cloud
Launch in user's home zone:	No
License:	DaaS Premium-Per User/Device
App Protection:	Anti-keylogging, Anti-screen-capturing
Folder:	-

Delivery group name:
EVP Desktop

Display name:
EVP Desktop

Delivery group description, used as label in Citrix Workspace app (optional):

Back Finish Cancel

Citrix On-Premises

This is an example of how to deploy a published desktop.

Step Instruction

Visual Aid

- 1 **Launch Citrix Studio**

Navigate to **Delivery Groups**

Click **Create Delivery Group**

Click **Next**

Select **Machine Catalog** (created prior)

Click **Next**
- 2 **Assign Machine to User(s)** (*may be defined in MC prior*)

Click **Next**

Select **Desktops** (*default option when Windows 10/11 detected*)

Click **Next**
- 3 **Select Restrict use of this Delivery Group...**

Click **Add**

Add **User(s)** and/or **Group(s)**

Click **OK**

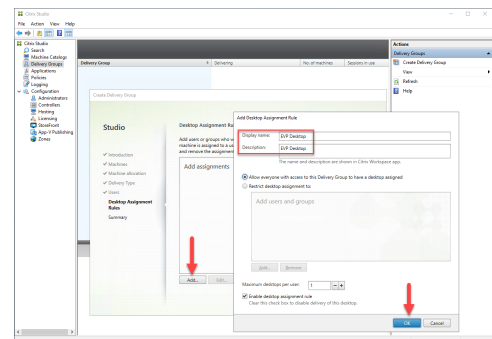
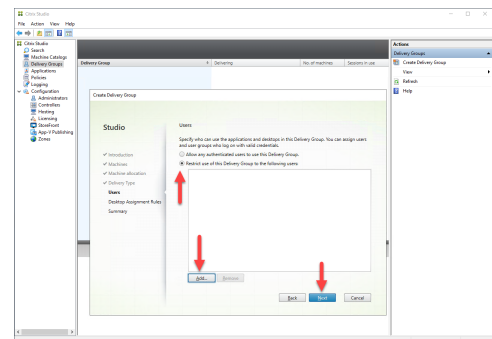
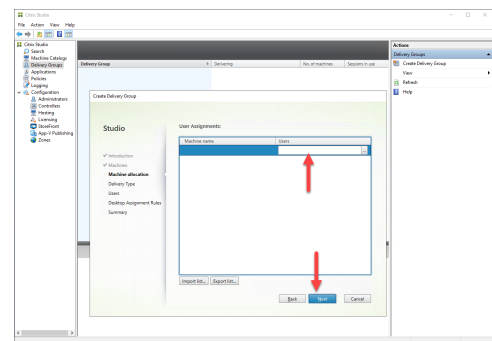
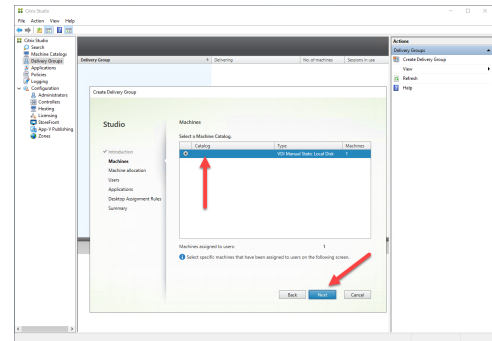
Click **Next**
- 4 **Click Add**

Enter **Display Name** as “**EVP Desktop**”

Enter **Description** as “**EVP Desktop**”

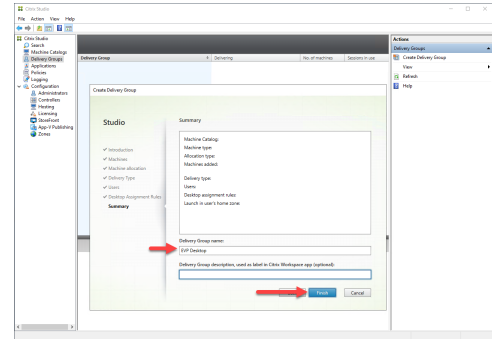
Click **OK**

Click **Next**



5 Enter Delivery Group Name as “EVP Desktop”

Click Finish



Windows Server (2019/2022)

Citrix Cloud

This is an example of how to deploy a published application.

Step Instruction

Visual Aid

1 Login to Citrix Cloud Subscription

Navigate to DaaS

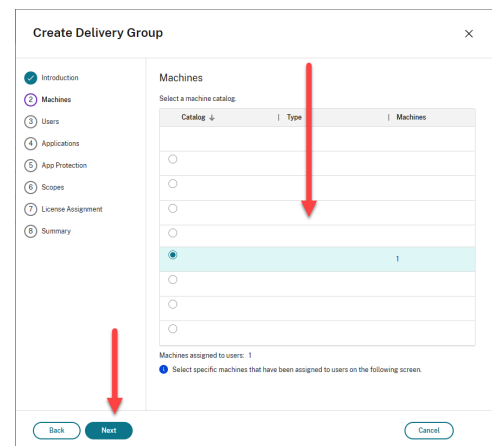
Click Delivery Groups

Click Create Delivery Group

Click Next

Select Machine Catalog (created prior)

Click Next



2 Select Restrict use of this delivery group

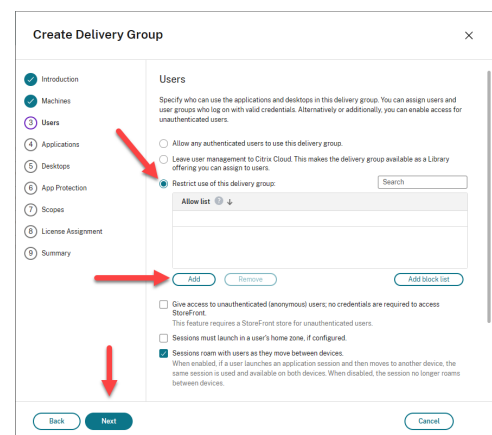
This is recommended but not required, select which user management best matches your organization.

Click Add

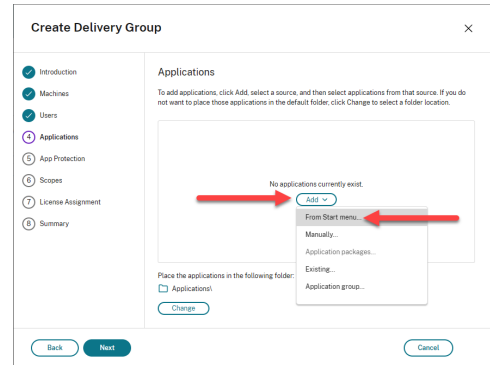
Add User(s) and/or Group(s)

Click Done

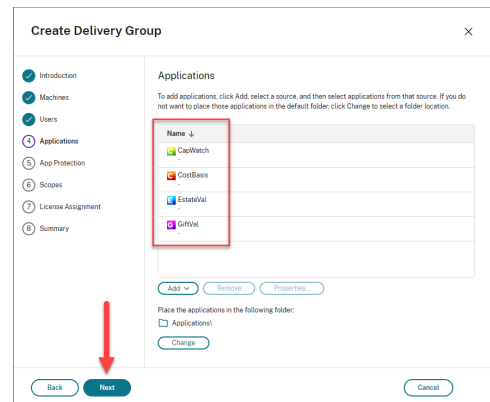
Click Next



- 3 Click Add
- Click From Start Menu



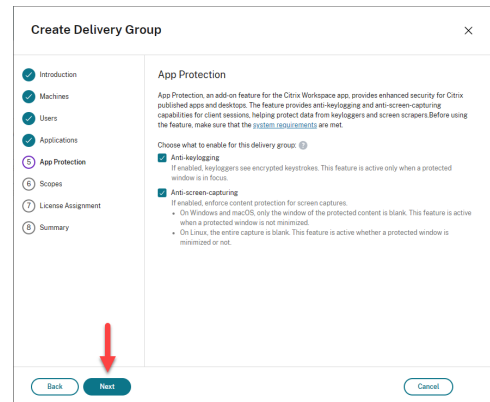
- 4 Check CapWatch
- Check CostBasis
- Check EstateVal
- Check GiftVal



- Click OK
- Click Next

Click Next

- 5 Check Anti-keylogging (optional, recommended for security purposes)
- Check Anti-screen-capturing (optional, recommended for security purposes)
- Click Next
- Select Scope(s)
- Click Next
- Select License Assignment (based on your Citrix subscription type)
- Click Next



6 Enter **Delivery group name** as “EVP Office”

Enter **Display name** as “EVP Office”

Click **Finish**

Create Delivery Group

Introduction
Machines
Users
Applications
App Protection
Scopes
License Assignment
Summary

Summary

Machine catalog:
Machine type:
Allocation type:
Machines added:

Users:
Applications to add:
Folder for new applications:
Launch in user's home zone:
License:
App Protection:
Folder:

Delivery group name:
EVP Office

Display name:
EVP Office

Delivery group description, used as label in Citrix Workspace app (optional):

Back Finish Cancel

Citrix On-Premises

This is an example of how to deploy a published application.

Step Instruction

Visual Aid

1 Launch **Citrix Studio**

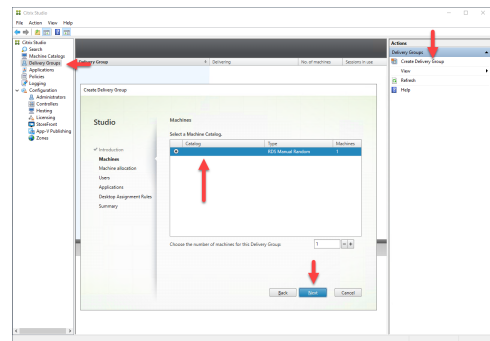
Navigate to **Delivery Groups**

Click **Create Delivery Group**

Click **Next**

Select **Machine Catalog** (created prior)

Click **Next**



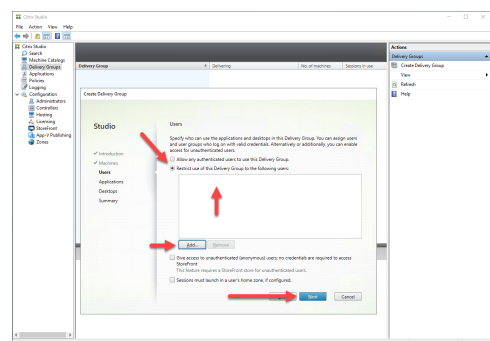
2 Click **Restrict use of this Delivery Group...**

Click **Add**

Add **User(s)** and/or **Group(s)**

Click **OK**

Click **Next**



3

Click **Add**

Click **From start menu**

Check **CapWatch**

Check **CostBasis**

Check **EstateVal**

Check **GiftVal**

Click **OK**

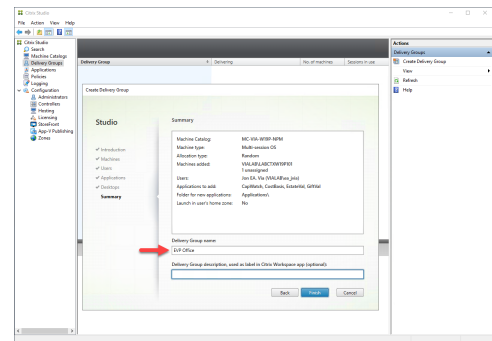
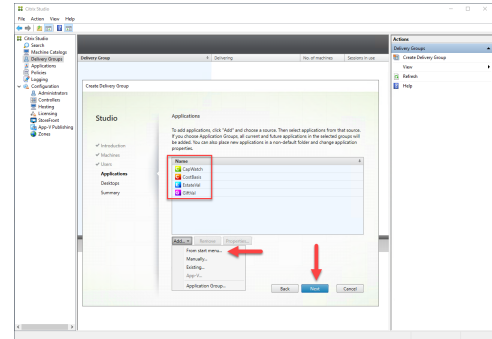
Click **Next**

Click **Next**

4

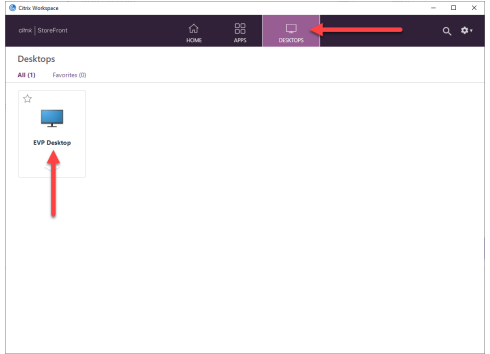
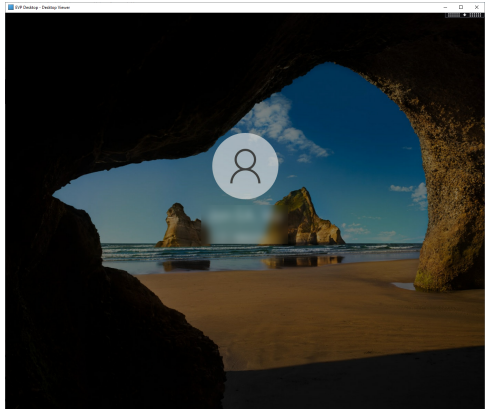
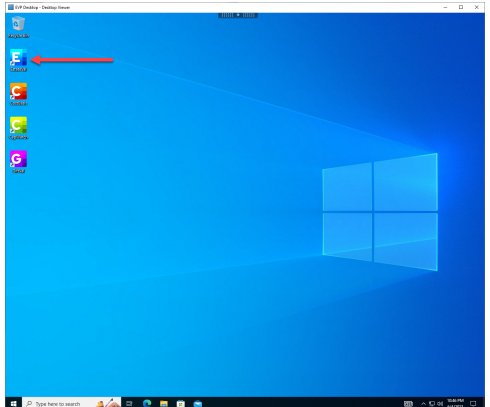
Enter **Delivery group name** as “**EVP Office**”

Click **Finish**



Testing Deployment

Published Desktop

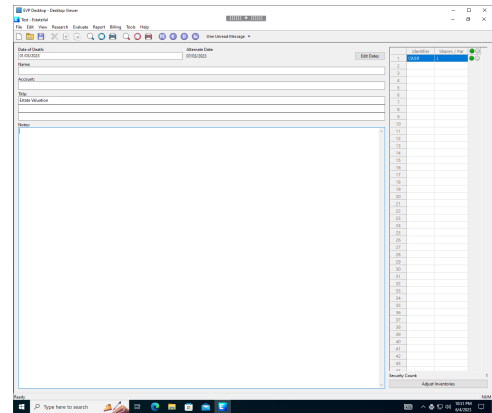
Step	Instruction	Visual Aid
1	<p>Launch Citrix Workspace App</p> <p>Enter Citrix StoreFront URL</p> <p>Login to Citrix StoreFront</p> <p>Click Desktops</p> <p>Launch EVP Desktop</p>	
2	<p>EVP Desktop will initiate launch via CWA</p>	
3	<p>EVP Desktop will launch</p> <p>Launch EstateVal</p>	

-
- The screenshot shows the SAP S/4HANA Cockpit interface. At the top, there is a navigation bar with icons for Home, Search, and other functions. Below the navigation bar, there is a header area with the text 'SAP S/4HANA Cockpit' and a search bar. The main content area displays a table titled 'Data of Death'. The table has three columns: 'Date of Death', 'Business Date', and 'Approximate Date'. The 'Date of Death' column is highlighted in blue. Red arrows point to the 'Date of Death' column header and the 'Business Date' column header. The table is empty, showing only the headers. Below the table, there is a section for 'Filter' and 'Columns'.

-
- The screenshot shows the 'Import' dialog box in Microsoft Dynamics CRM. The 'Import From' dropdown is set to 'From CSV'. The 'File name' field contains 'ImportFromToPDF'. The 'File type' is 'CSV (comma delimited)'. The 'File range' is 'All'. The 'Number of rows' is '5'. The 'Import' button is highlighted with a red arrow.

- [illegible]

- 7 **Close EstateVal**
Log off EVP Desktop

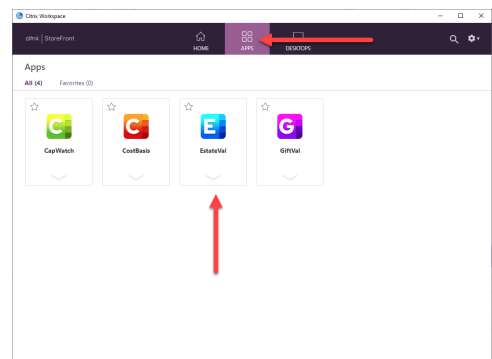


Published Application

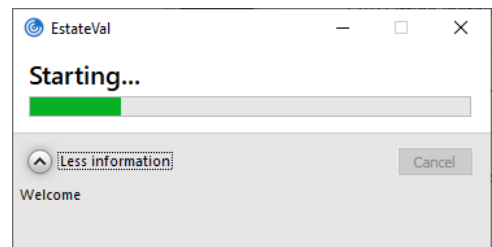
Step Instruction

- 1 **Launch Citrix Workspace App**
Enter Citrix StoreFront URL
Login to Citrix StoreFront
Click Applications
Launch EVP EstateVal

Visual Aid



- 2 **EstateVal will initiate launch via CWA**



- 3 **EstateVal will launch**
Launch Citrix Workspace Connection Center
Confirm EstateVal is running via CWA
Complete any remaining tests (see above)
Close EstateVal

