

GETTING STARTED WITH PORTFOLIOCENTER HOSTED™ STANDARD

PortfolioCenter Hosted Standard provides access to PortfolioCenter®, PortfolioCenter Export Wizard and the Hosted storage system through a secure Citrix® connection. The Standard environment is optimal for front-office operations staff or casual users of PortfolioCenter that need quick access to client information or reports. Running long processes such as batch print jobs or batch interval generation is not recommended via the PortfolioCenter Standard connection.

STEP 1: LOG INTO THE PORTFOLIOCENTER HOSTED WEBSITE



Note

The steps outlined below are intended for Internet Explorer users.

- 1 Open your browser and navigate to www.portfoliocenterhosted.com.
- 2 Enter your User ID and Password. (username ex-“1234.john.doe”).

Click **Log In**.

Welcome to PortfolioCenter Hosted™

Log In

User ID

Password

Log In

Trouble logging in?
Call our Technical Client Service Team
at 800-528-9595 Option 5

VeriSign Secured
VERIFY

- 3 For security purposes, first time users will need to reset their password.

Schwab Performance Technologies

Password Expired

Requirements for your new password:

- The password must be at least 8 characters long.
- The password must contain at least three of the following:
 - Uppercase letters
 - Lowercase letters
 - Numbers
 - Symbols (such as !, @, #, \$)
- The password cannot contain part of your username.
- The password cannot be one of your previous 13 passwords.

IMPORTANT: If you use this user ID to download data files, you must also enter the new password Delivery, the download will fail.

Old Password

New Password

Confirm New Password

- 4 After logging into the lobby, re-enter your login information to access the PortfolioCenter Hosted environment through Citrix.

PortfolioCenter Essential Applications

CITRIX

Logon

✓ An appropriate client is available on your computer.

User name:

Password:



Note

If the Citrix Client application is not installed properly you may see an Install button. For instructions installing the Citrix client, refer to [Installing the Citrix Client for IE](#) document.

STEP 2: USING PORTFOLIOCENTER IN THE STANDARD ENVIRONMENT

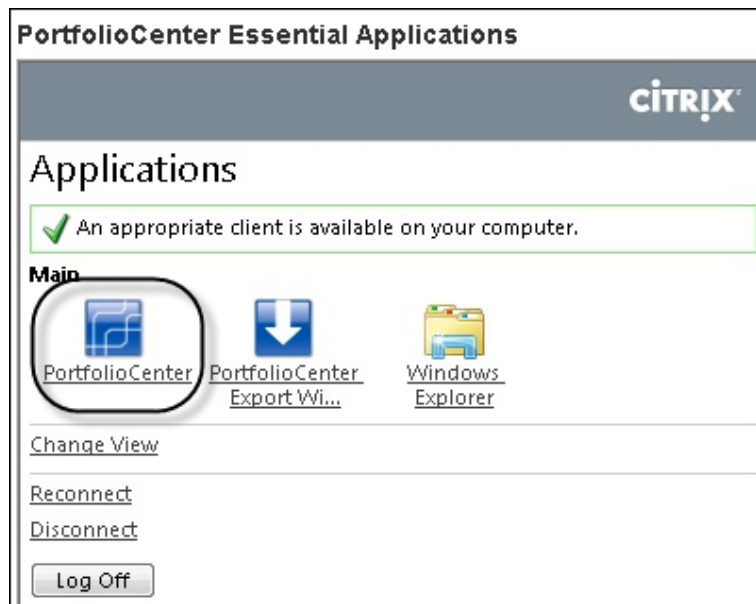


Important

The PortfolioCenter Hosted Standard connection through Citrix will close if there is no activity for 15 minutes. Any application currently running when the session closes will remain active.

Your PortfolioCenter session will end in the Standard environment if there is no activity for 8 hours.

- 1 Click on the PortfolioCenter icon in the Citrix applications window.



- 2 When the PortfolioCenter Login dialog opens, similar to the example on the right, enter your user name and password.

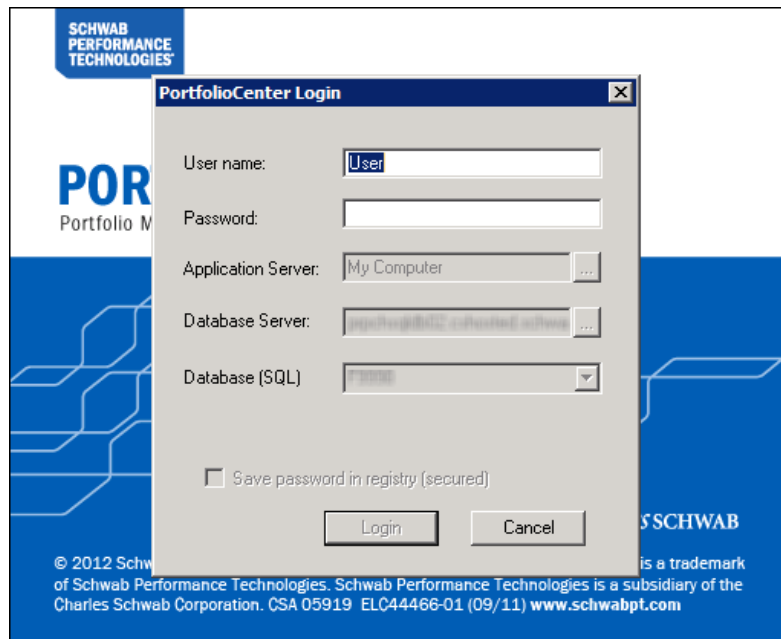
The remaining information contains the default server and database names. Accept the defaults.

New PortfolioCenter users should use the following information:

Default User Name:
SecurityAdmin

Default Password: password

- 3 Click the **Login** button.



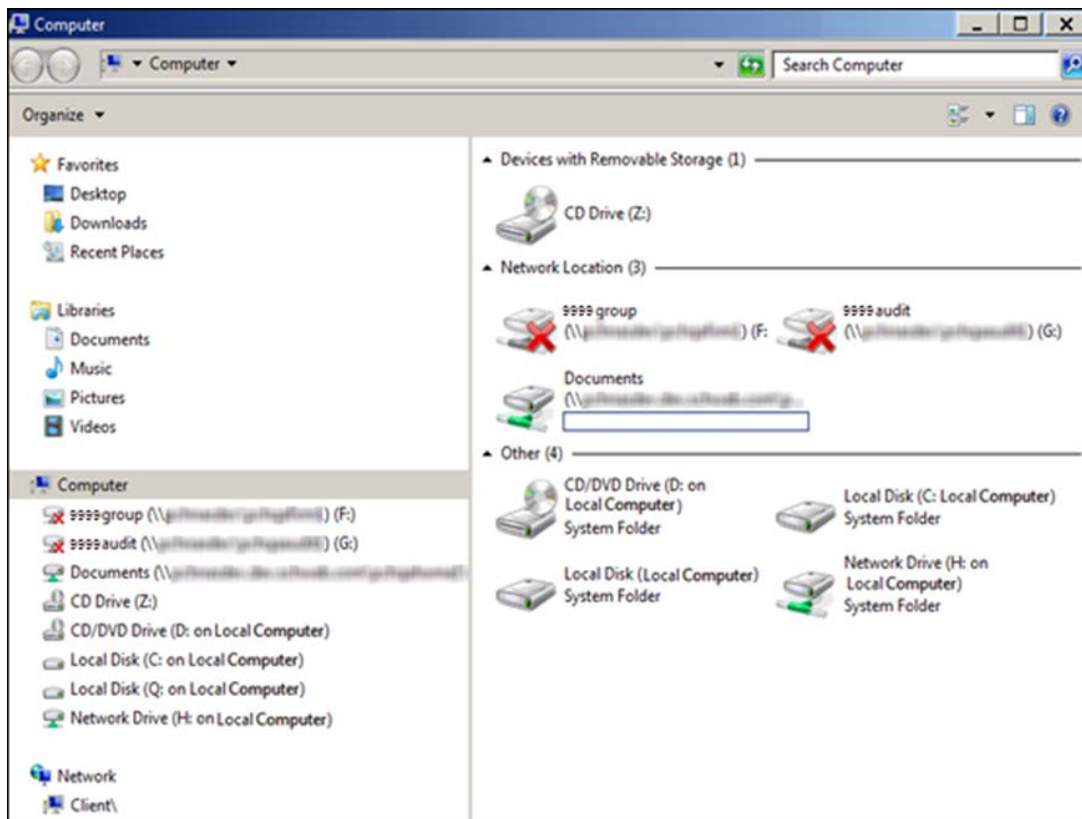
- 4 The program opens to the default dataset.

STEP 3: USING WINDOWS EXPLORER IN THE STANDARD ENVIRONMENT

Windows Explorer in the PortfolioCenter Hosted Standard environment provides you with the ability to save files to the firm (F:\) and user (H:\) drives.

It also provides a way to transfer files between your local computer and the Hosted environment.

- 1 Click the Windows Explorer link in the Citrix applications window



Windows Explorer provides the following drive options:

DRIVE	DESCRIPTION
F:\ Drive	A firm drive that is accessible by every person with a valid login to the company's hosted environment
H:\ Drive	A user drive that can only be accessed by the specific user logged into the current session
C:\ Drive or Mapped Drives	Any local drive that is accessible from the device currently connected to the Workstation environment



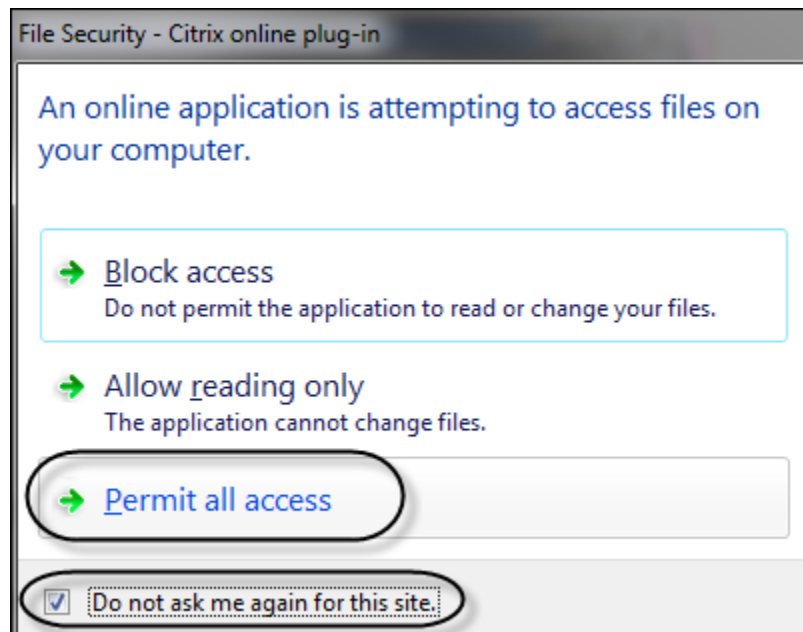
Note

For specific instructions about using the Windows Explorer feature refer to the [Copying Files in the PortfolioCenter Hosted Environment](#) document.

CITRIX FILE ACCESS

After clicking on the Windows Explorer link, the Citrix online plug-in window displays.

Select the file security option of **Permit all access** and check the **Do not ask me again for this site** box to ensure that Citrix can access all necessary files on your local computer.

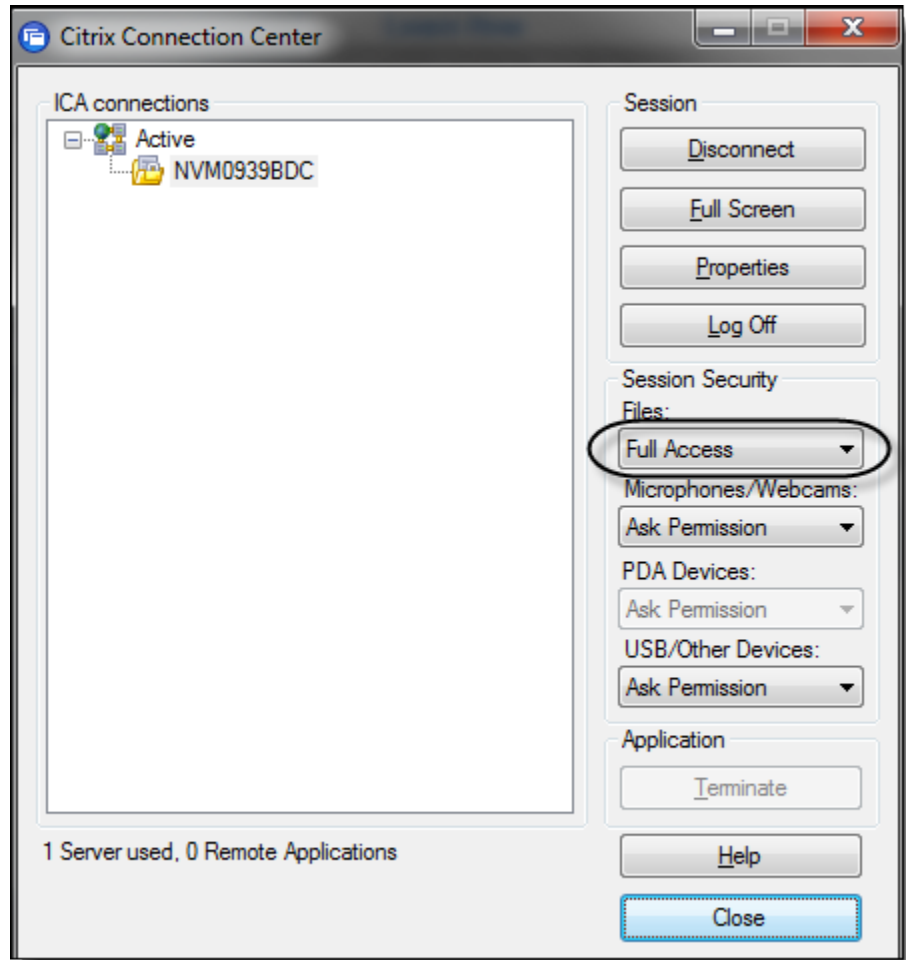


If you need to access these options again for any reason, double click the Citrix Connection Center icon in your system tray.



Adjust the selection for Session Security Files to **Full Access**.

Click **Close**.



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