

## COPYING FILES IN THE PORTFOLIOCENTER HOSTED™ ENVIRONMENT

While working in your PortfolioCenter Hosted environment, there will be occasions where you will need to copy files between your local desktop and the virtual machine located in the PortfolioCenter Hosted data center. The PortfolioCenter Hosted environment simplifies this process by automatically mapping your local drives and all your network drives to easily move files between the two environments.

### UNDERSTANDING YOUR DRIVES

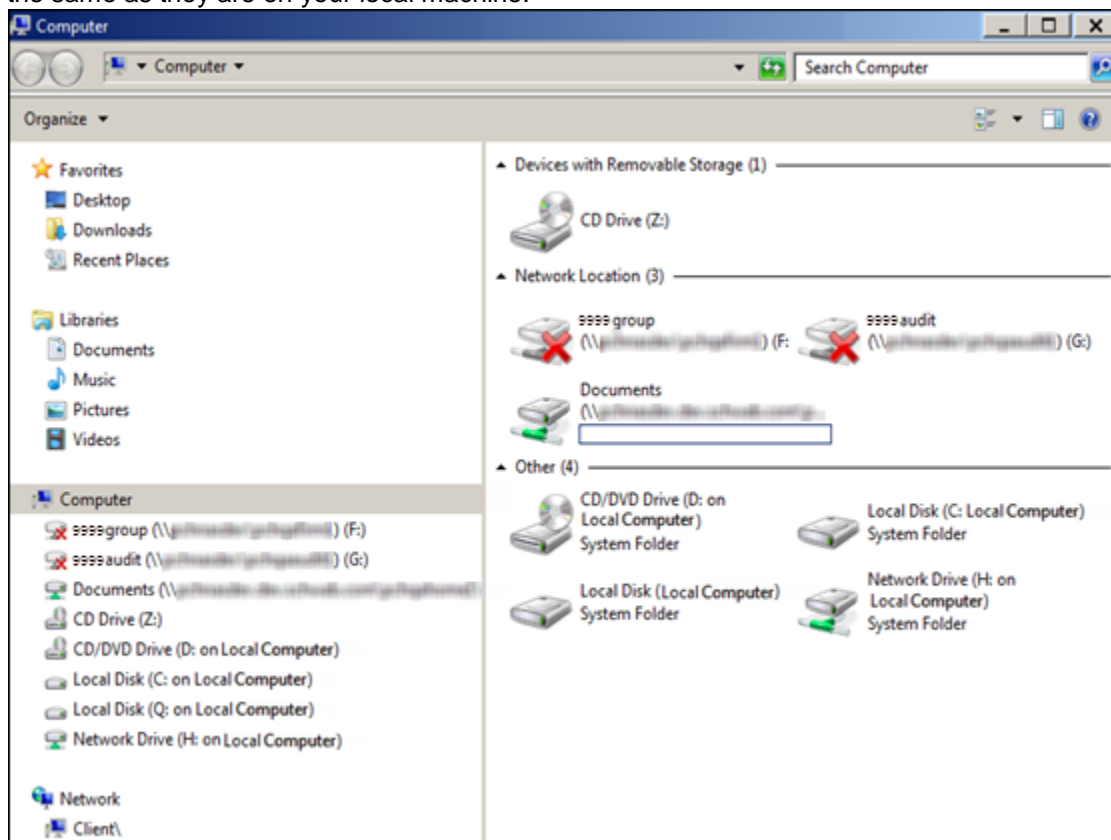


#### Note

From your PortfolioCenter Hosted Virtual Desktop, double click on the My Computer icon on the desktop or go to **Start | Computer** to access Windows Explorer. When connecting via Citrix, clicking on the Windows Explorer icon in the Citrix Window opens the Hosted Windows Explorer.

In the Windows Explorer window, multiple drives are listed. The Network Location listings are the drives in the PortfolioCenter Hosted Environment. For example, the documents drive is the hosted storage that is assigned to you. All files saved in the PortfolioCenter Hosted environment will be saved to the Documents or Firm directories.

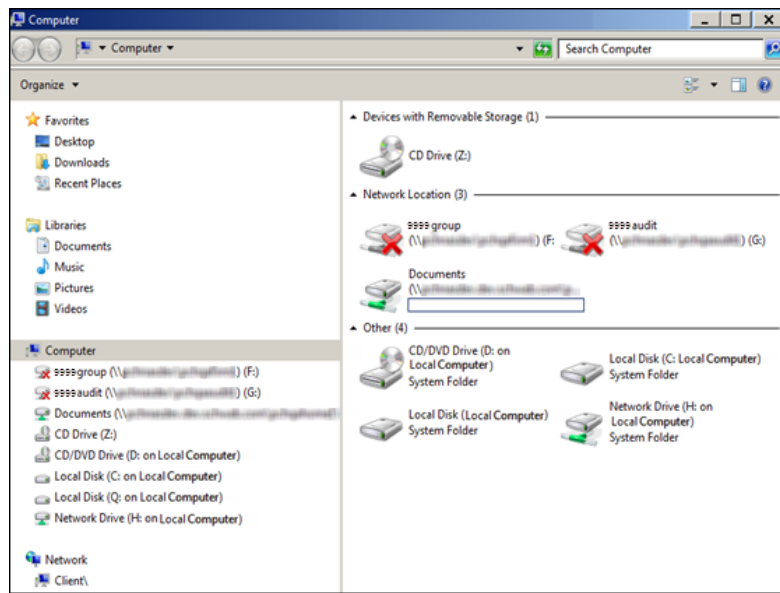
In the Other section you will see all of your local drives and network drives listed. The drive letters will not be the same as they are on your local machine.



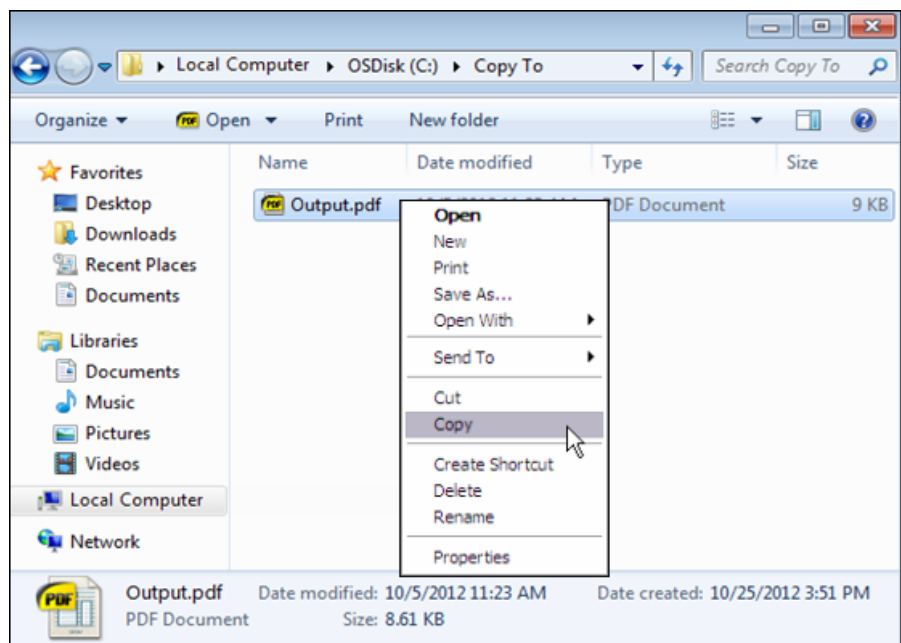
## COPYING FILES

To copy files from one environment to the other, follow these steps:

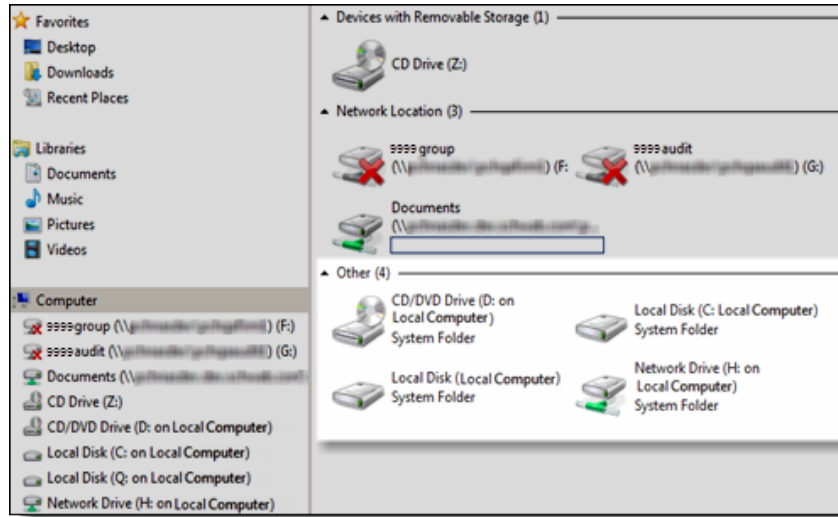
- 1 Open Windows Explorer on the virtual machine or in the Citrix Applications Window.



- 2 Browse to the file you would like to move.  
Right-click on the file and select **Copy**.

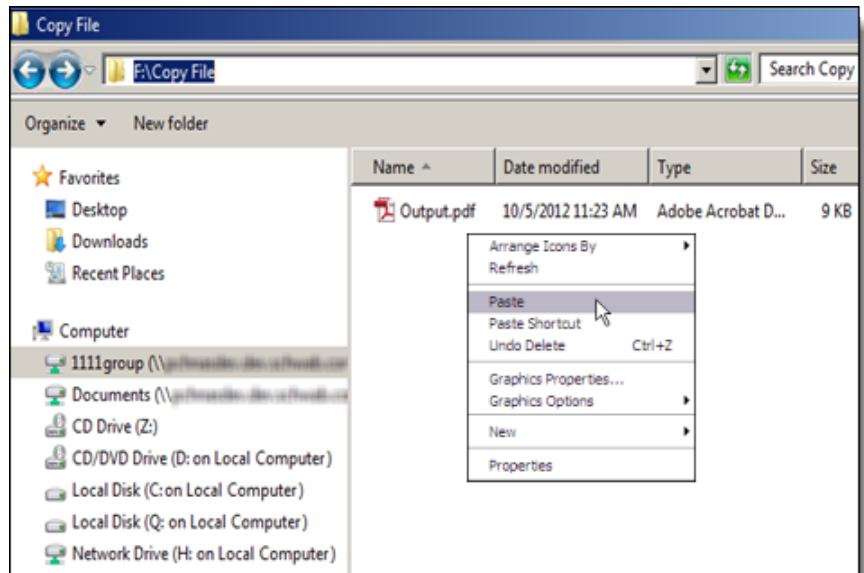


- 3 Select the location where you would like to save the file from your Local Computer by browsing to your Hosted Drive in the Other section of the Windows Explorer.



- 4 Right-click and select **Paste**.

The file is now available on your Hosted desktop for use.



**Note**

Files can also be saved directly from PortfolioCenter® to your local computer through the save menu in the application.

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