

INSTALLING THE CITRIX CLIENT® FOR PORTFOLIOCENTER HOSTED™ STANDARD

PortfolioCenter Hosted Standard users connect to the Hosted environment using a secure Citrix connection. In order for this connection to work, the Citrix client application needs to be installed. The steps below outline the Citrix client installation process.



Important

This document is for Internet Explorer users only.

STEP 1: LOG INTO THE PORTFOLIOCENTER HOSTED WEBSITE

- 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

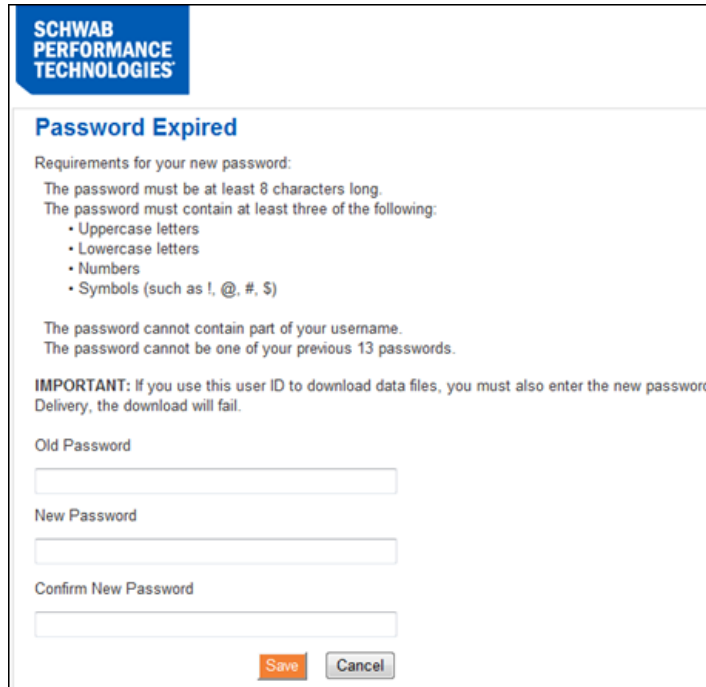
Password

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.



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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.

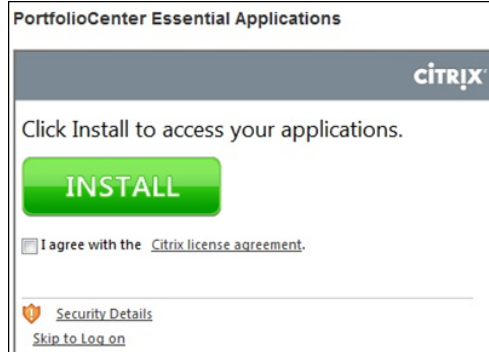
Old Password

New Password

Confirm New Password

STEP 2: DOWNLOAD AND INSTALL THE CITRIX CLIENT

- 1 After logging in to the lobby, review the Citrix License Agreement, check the agreement box, then click on the **Install** button.



PortfolioCenter Essential Applications

CITRIX


Click Install to access your applications.

I agree with the [Citrix license agreement](#).

[Security Details](#)


[Skip to Log on](#)

- 2 In the File Download – Security Warning window, select **Run**.



File Download - Security Warning

Do you want to run or save this file?



Name: CitrixOnlinePluginWeb.exe
Type: Application, 13.5MB
From: apphost1.portfoliocenterhosted.com

 While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. [What's the risk?](#)

- 3 Select **Run** in the Internet Explorer – Security Warning window.



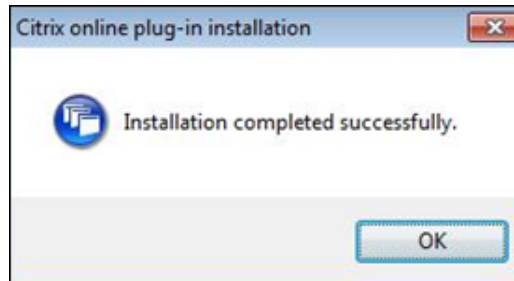
- 4 After the Citrix install runs, a message may appear asking to Run ActiveX Control.



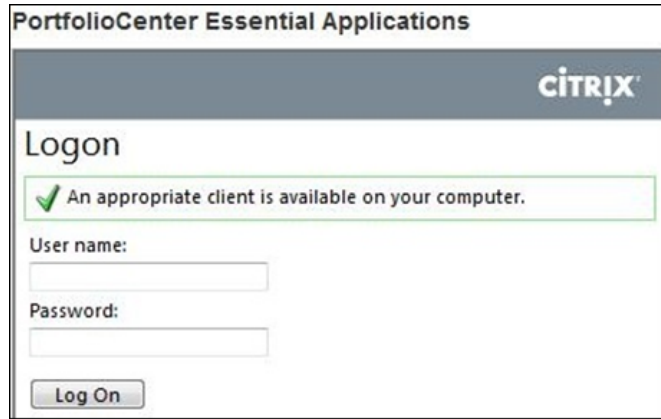
- 5 Click on the yellow warning bar and choose Run Add-On.



- 6 When the installation is complete, click **OK**.



- 7 After the installation is complete, enter the PortfolioCenter Hosted login information again.



PortfolioCenter Essential Applications

CITRIX

Logon

✓ An appropriate client is available on your computer.

User name:

Password:

Log On

For more information about using PortfolioCenter Hosted Standard refer to the [Getting Started Guide for PortfolioCenter Hosted Standard](#).

For institutional audiences only.

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