

Saving Files

As a Client user, you can temporarily save files in your Client folder on Bookminders' server; however, if you want to save your files long-term, you should save them to your local computer.

We recommend this because your Client folder (on the server) contains copies of the updated data files processed by Bookminders. When your bookminder completes a processing of your account (usually weekly), he/she deletes or overwrites the existing files in your folder to replace them with the newer copies of your files. When this occurs, files that you saved could be deleted permanently.

When saving files from Bookminders' server, there is no option to save to your local desktop, so we strongly recommend you set up a folder named **Bookminders** on your local hard drive. (Your local hard drive will be the "V:" drive when you are logged in to Bookminders' Server.) This will make it easier for you to save files and easier for you to locate the files after you save them.

To save files to your local computer, open the file you want to save:

- Click **File / Save As** (from Word or Excel) or **File / Save a Copy** (from Adobe Reader).
- Click the **My Computer** icon (located on the left side of the save screen).
- Double-click the **C\$ on 'Client' (V:)** drive (listed in the main part of the screen) and then double-click on the **Bookminders** folder (or another folder on your local computer - **C\$ on 'Client' (V:)** drive).
- Click **Save**.

Note: If you see the following error message when trying to save files to your local computer, you must change Client File Security Access settings.



To change your Client File Security Access settings:

- Locate and right-click on the red Citrix icon in your system tray:
- Click: **Open Connection Center**
- Click the **File Security** button
- In the Client File Security window (picture below), change the security settings to:



- **Access Level: Full Access**
- **Do you want to be asked again: Never ask me again for this site**
- Click **Ok**.
- Try again to save files to your C: drive

Note: If your Citrix icon is blue (not the red "i" icon above), you have a newer version of the Citrix Client. See [Accessing Bookminders' Server](#) for instructions to change File Security settings (www.bookminders.com - click on Help link).

If you have any questions or problems using these instructions, please do not hesitate to contact your bookminder or Client Relations Manager.

