

Saving Work in Citrix Sage and Citrix QuickBooks

These instructions outline how files may be saved or backed up in Citrix Sage and Citrix QuickBooks, but please follow guidelines provided by your instructor.

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For further assistance with Citrix, please contact the CEIT Service Desk at servicedesk@douglascollege.ca

File Locations Available When Using the Citrix Accounting Desktop

Use of the Citrix Accounting Desktop involves a computer (the machine a user is physically touching) and a virtualized desktop running on a server at the college.

Work can be saved to various locations. It's a good idea to save or move files to a chosen location as soon as a user starts working and to save regularly while working, unless the program saves automatically.

The locations shaded in blue in *Figures 1 and 2* are on the Citrix server. Saving to these locations is generally not recommended, as the files will be stored temporarily, but will be removed daily and could become unavailable when a user disconnects. However, this may be the most practical option for Sage and/or QuickBooks, so please follow the guidance of your instructor.

The locations shaded in purple in *Figures 1 and 2* are on the user's computer (the machine that they are touching). In this example, the computer is a Douglas College laptop named B68424-LAPTOP. When saving to this location,

- save to the Local Disk C:\Temp folder and then move the file to the desired location when ready, or
- navigate to Local Disk C:\Users, choose the folder that matches your username, and choose a destination folder.

The locations shaded in yellow in *Figures 1 and 2* refer to the flash drive (aka USB or thumb drive) plugged into the user's computer. The drive will typically be named Removable Disk and will often show as the D: drive. A user should insert their flash drive before connecting to Citrix, if possible, and should verify that they can see files on that drive before proceeding.

The locations in green in *Figures 1 and 2* refer to network drives. Employees should see shared drives as well as the drive with their CNA username (e.g. U:\smithj).

The locations and highlighting shown in *Figure 2* (below) are applicable to both the Citrix Sage Save as Copy dialogue box and Citrix File Explorer.

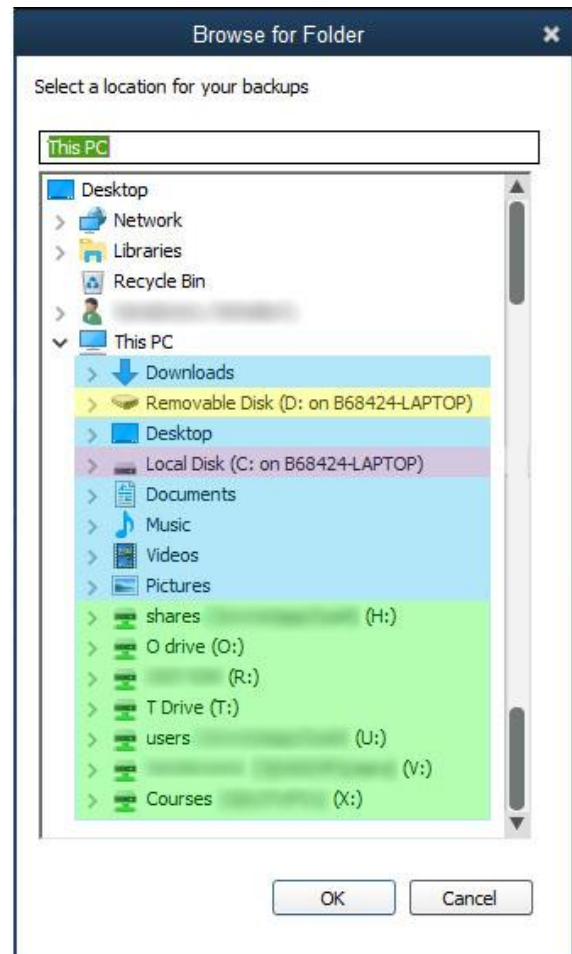


Figure 1. Identify file locations - Citrix QuickBooks

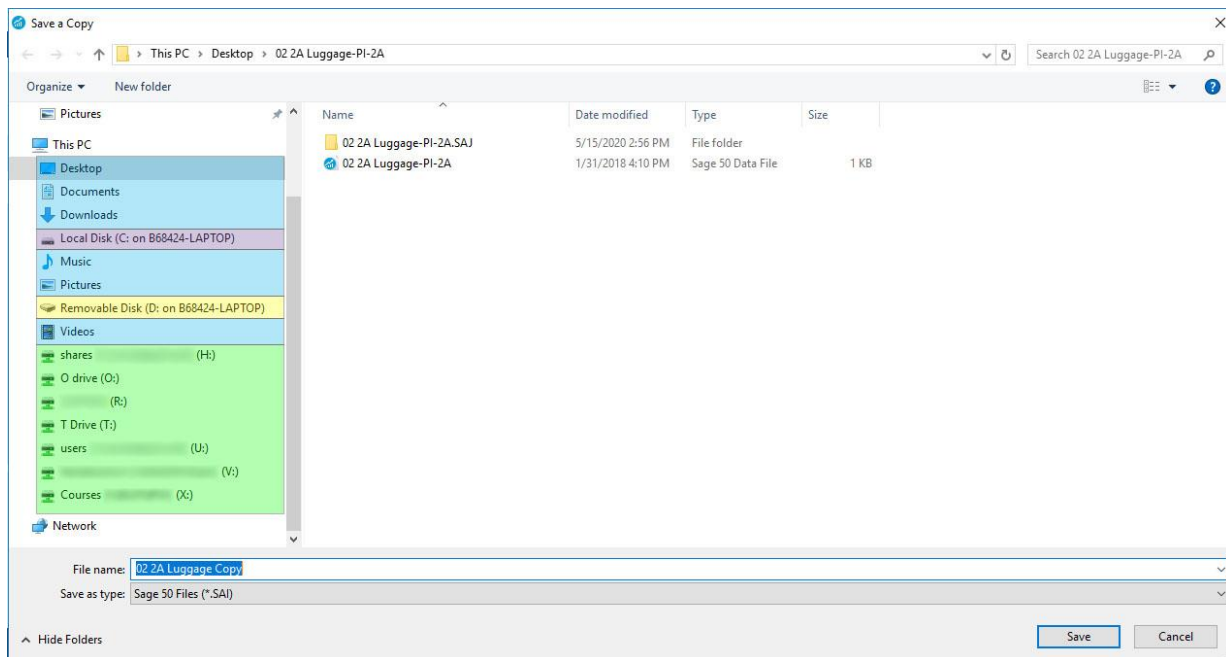


Figure 2. Identify file locations – Save a Copy in Citrix Sage

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