

## Glossary of File Extensions

The following file extensions are used in Portfolio Builder (PB), VisionWorks (VW), CorpWorks (CW), and TrustWorks (TW).

### Portfolio Builder Files: \*.vsb, \*.vssm, \*.vsa, \*.vssr, and \*.vsd Files

- In Portfolio Builder, you can save files for use on another computer. Click the Save To File button. To load files on another computer, click the Load From File button, locate the desired file, and click the Open button.
- On the Basic tab, you can save portfolios as files with a \*.vsb extension.
- On the SMAs tab, you can save portfolio managers and separately managed accounts (SMAs) as files with \*.vssm extension.
- On the Asset Allocation tab, you can save Library portfolios as files with a \*.vsa extension. You can save return assumptions as files with a \*.vssr extension. The \*.vsa and \*.vssr files are **common** to VW, CW, and TW. You can edit the allocations or return assumptions once and load them for all three programs.
- On the Detailed tab, you can save portfolios as files with a \*.vsd extension.

### To Do Reports Tab>Reports Sub-Tab: \*.vwt, \*.cwt, and \*.twt Files

- On the Reports sub-tab, you can create report text templates. Click the templates Save button to save a text template as a file with a vwt, cwt, or twt file extension.
- The text templates are **specific** to VW, CW, and TW.

### To Do/Reports Tab>Reports Sub-Tab: \*.vwr, \*.cwr, and \*.twr Files

- On the Reports sub-tab, you can select Sections and Sub-Sections and create templates. Click the Save Template button to save your selections as a file with a vwr, cwr, or twr file extension.
- The report templates are **specific** to VW, CW, and TW.

### Presentation Builder: \*.vsr and \*.vstg Files

- On the Presentation Builder>Report Settings tab, you can select fonts, point size, and a colour scheme, add cover page graphics, and design the look-and-feel of tables and graphs. On the Print tab, you enter your contact information. The report settings are **common** to VW, CW, and TW. You edit the report settings once. They apply to all three programs. Click the Save To File button to save your settings as a file with a vsr file extension.
- On the Presentation Builder>PowerPoint tab, you can create Microsoft™ PowerPoint tags that you can insert into a PowerPoint template in order to run PowerPoint presentations.
- Click the Save to File button to save your PowerPoint tags as a file with a \*.vstg file extension.