



MICROSOFT

# ProSystem fx Portal Client User Guide

Icon Legend



Keys

Quick reference to the key aspects of a particular function



Tip

Best practice tips and shortcuts



Notes

Informational notes about functions



Warning

Important warnings about a function

## About ProSystem fx Portal

Portal is a simple and easy to use Web application that facilitates secure file transfers and continued access between [ST. CLAIR CPAs, P.C.] and our clients. For our clients, Portal is a web-based interface that only requires the installation of Microsoft Silverlight for use.

Your Portal User ID and login information will be provided via email. All documents made available for continued access such as a tax return or financial statement will remain on your portal for a stated period of time in accordance with [ST. CLAIR CPAs, P.C.]'s record retention and portal use policies.

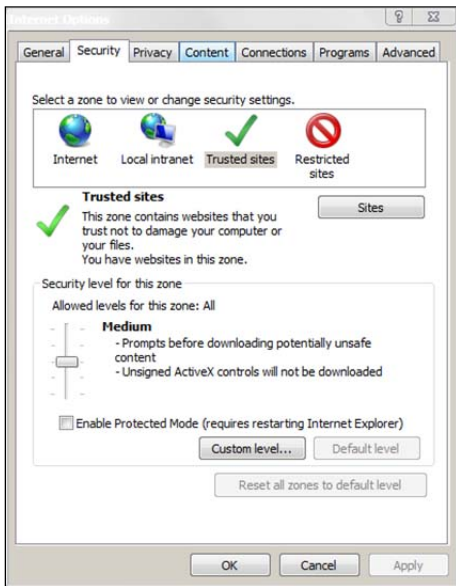
## System Requirements

- Portal relies on the Microsoft Silverlight 3 platform and a user may be prompted to install Silverlight from Microsoft's website the first time they login. The install is completely safe and typically takes less than a minute and just a few clicks.
- Portal will support all browsers on PC and Mac that are compatible with Microsoft Silverlight 3.
- A complete list of browsers and operating systems that support Silverlight 3 can be found at <http://www.microsoft.com/silverlight/get-started/install/default.aspx>
- Mac computers with Intel processors are able to access Portal.
- If you are a Mac user, browse to the link below to verify your computer's processor type. <http://support.apple.com/kb/HT1531>

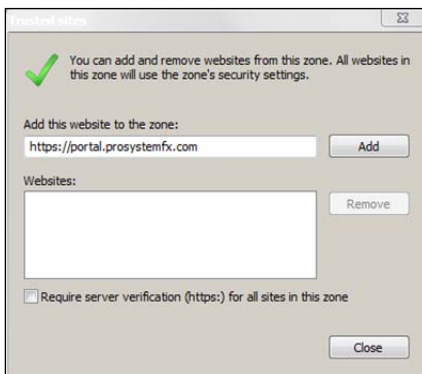
## Internet Explorer



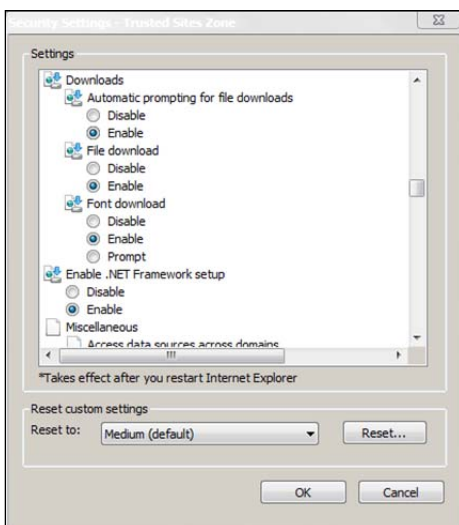
Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of ProSystem fx Portal, changing the following settings may allow for even easier use:



Internet Options



Trusted Sites



Custom Level



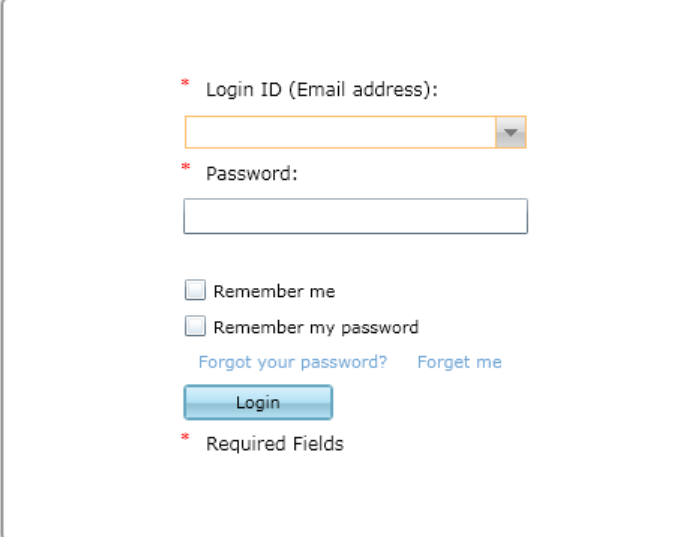
### Internet Explorer Settings

1. Open Internet Explorer and browse to <https://portal.prosystemfx.com/portal>
2. In Internet Explorer: select **Tools, Internet Options**, click on the **Security** tab, click **Trusted Sites**, and then click on the **Sites** button.
3. Click **Add** to move the Portal URL to the Trusted sites zone, then click close.
4. Click **Custom level**.
5. Click **Enable** for Automatic prompting for file downloads.
6. Click **Enable** for File Download.
7. Click **OK** to save the changes.

## Quick Start Guide

### Portal Login

Launch your Web browser and browse to <https://portal.prosystemfx.com/portal>



The screenshot shows a login form with the following elements:

- A red asterisk followed by the text "Login ID (Email address):" above a text input field with a dropdown arrow on the right.
- A red asterisk followed by the text "Password:" above a text input field.
- Two checkboxes: "Remember me" and "Remember my password".
- Two blue links: "Forgot your password?" and "Forget me".
- A blue "Login" button.
- A red asterisk followed by the text "Required Fields" at the bottom.

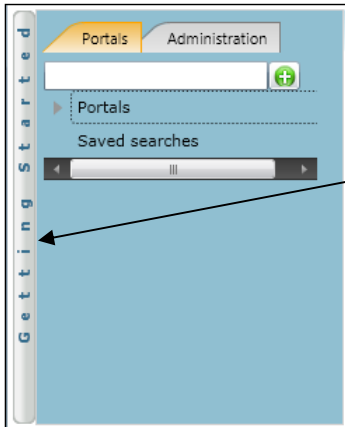
Portal Login



#### Login Tips

- Refer to the emails received from the firm for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- For security reasons, you are required to change your password upon logging in for the first time.
- Your new password may be from 8 to 32 characters, must contain at least one alpha character, one numeric character, one special character (e.g. !, @, #, etc.) and is case sensitive.
- Your password may be reset at anytime by clicking "[Forgot your password?](#)"

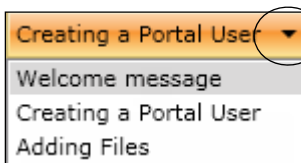
## Getting Started



Getting Started ribbon



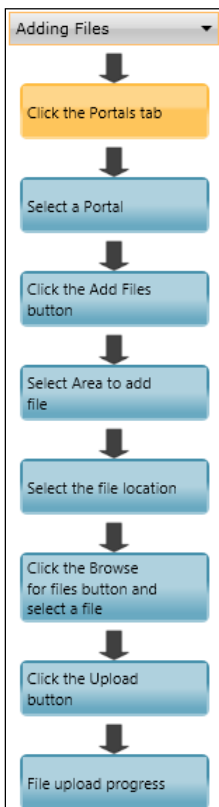
A short “**Welcome to the Portal!**” message will be presented to each user upon their initial login to Portal. The welcome message simply directs users to the expandable/collapsible **Getting Started** menu. Click the **Getting Started** ribbon on the left side of the screen to expand and view this menu.



Menu Selection



Click the black arrow to view **Getting Started** menu options. Creating a Portal User will only be visible Portal Admin users. **The Welcome Message and Adding Files will be visible to all Users.**



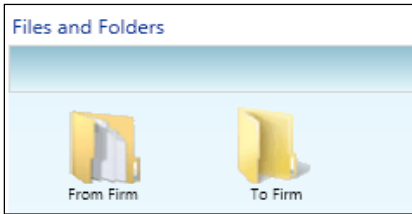
Adding Files



### Getting Started menu Key Features

- When clicking on the buttons, the respective feature in Portal will begin to flash in order call attention to it.
- Perform the suggested (flashing) step, and then click on the next step to easily perform each step required to add files to Portal.
- This feature is not only for informative purposes, it may be used to add files to Portal for the firm to view (e.g. Returns, Financial Statements) are added to Portal.

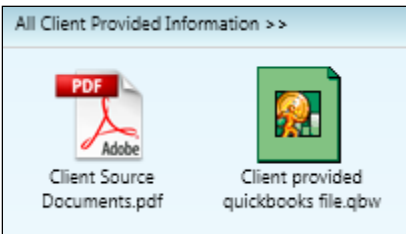
## Download files from Portal



**Files and Folders**



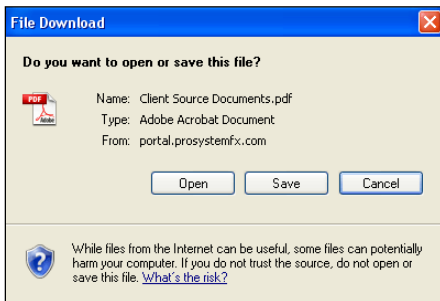
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



**Portal Documents**



A simple way to view or save a file is to double-click on the file name. Double-clicking on a file will display the **File Download Box**, displayed below.



**File Download Box**



Click **Open** to view the file or **Save** to download/save a copy to your computer or network. When a file is downloaded, a copy is created and does not delete or affect the file on your portal. If the file download screen does not display due to your browser's security settings, a small window will appear in the lower right portion of the screen allowing you to access the file.



The File Download example displayed above refers to Internet Explorer. Other Web browsers may respond differently when you double-click on a file name, however, this will not affect your ability to access the file.



It is recommended to download (save) a copy of your deliverable items from Portal, as most files will not remain there indefinitely. The firm can provide more detail regarding how long files will be accessible via Portal.

## Add Files to Portal

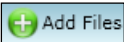
The screenshot shows the 'Add Files' interface with the following elements:

- 5**: Firm >> Add Files (top left)
- 1**: Portal: CCH Training Client (input field)
- 2**: Select File Location: CCH Training Client (tree view with 'From Firm' and 'To Firm' options)
- Area: Collaboration (dropdown menu)
- Keywords: Enter Keywords separated by commas (input field)
- Table with columns: File Name, Portal Name, File Location, Area, Keywords. One row is highlighted: 12-31-09 Form 1065 Client Copy, CCH Consulting and, From Firm, Collaboration.
- 3**: Browse for Files, Apply to Selected, Remove Selected File, Copy to Multiple Portals (action buttons)
- File Upload Progress (table with columns: File Name, Size, Progress, Status)
- Pause All, Resume All, Clear Completed, Remove selected file (control buttons)
- Connected to Portal Server (status indicator)
- 4**: Upload, Cancel (bottom right buttons)

### Add Files



### Steps to Add Files to Portal

On the Portal Home page; click  to display the Add Files screen, (above).

1. Select a portal (only for those users that have access to multiple portals)
2. Set the file location (destination folder within the Portal)
3. Click "**Browse for files**" and select file(s) via Windows Explorer
4. Click "**Upload**" to add the file(s) to Portal
5. Click "**Back**" to return to the User Homepage



## Advanced Features

- This section is intended to provide assistance on the more complex portal features available to the Portal Admin user. The advanced features are **optional** and are not required for each portal.
- As the primary user for the portal(s) the firm has created for you, you can login and begin to exchange files with the firm immediately without taking any additional steps. In the event you choose to provide others in your organization or third parties access to your portal(s) you may find the following features helpful.

### Portal User Roles

#### Portal Admin

- The Portal Admin is the primary user who has access to the portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access by other Portal Users. The Portal Admin user will be the only user that exists initially.

#### Portal User

- A Portal User is created and granted portal access by the Portal Admin or a Firm Administrator at the Firm. Portal Users should only be created when Portal access is required by more than one person.

### About User Roles



As a Portal Admin, you control who may access the portal(s) that have been created for you or your organization. It is prudent to maintain strict control over portal access by others, as documents on the portal are likely to be of a sensitive nature.

### Example of Advanced Portal Use

- You may find situations in which it is practical to grant Portal access to a 3<sup>rd</sup> party - for example; a banker that you and the firm collaborate with on a regular basis. Before being granted access to the portal; options to exchange information included email, fax, CD-ROM or paper. In many cases, you had to request the information from the firm before you could provide it to the bank, and vice versa. As the Portal Admin, you may create a Portal User for your banker allowing access to files and the ability to add files as requested; considerably reducing time and resources spent to exchange information. The level of security built into Portal far exceeds email and should replace it as the primary medium for electronic exchange of sensitive information. All files added to a Portal will be accessible by the firm, Portal Admin and any 3<sup>rd</sup> party Portal Users.
- If the firm has created more than one portal for you, you will be able to control which portal(s) your Portal Users may view.



As circumstances change, portal access should be updated or completely terminated. The Portal Admin user and the Firm's admin account may terminate portal access.

## Managing Portal

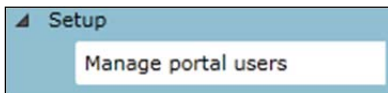
- The Portal Admin may easily grant Portal access to others by creating Portal Users.



There are 2 steps to create Portal Users.

1. Assign Personal information
2. Assign Portal access and security

## Create Portal Users



Manage Portal Users



From the **Administration** tab, click **Manage Portal Users**, then click **Create** at the bottom of the page.

Create Portal User



### Assign Personal Information

1. In the Personal tab enter the portal user's email address in the **Login ID** box
2. Select a Default **Security User Role** from the drop down menu
  - **Administrator** –Grants all rights of Portal
  - **Standard User** -Denies the ability to overwrite existing files, all other rights are granted
  - **Limited User** –Grants all rights except; overwrite existing files, lock\unlock files, and append to an existing PDF file
  - **Read-Only User** – Allows users to search for and view the file; its history and properties only
3. Enter the **Last Name** and **First Name** of the Portal User
4. Select the **Portal Access and Security** tab at the top of the screen

Portal Access	Grant Access	Access Expiration	Security User Role	Client Area
<input type="checkbox"/> Jake Able	<input checked="" type="checkbox"/>		Standard User	

**Create Portal User**



### Assign Portal Access and Security

5. All portals that the Portal Admin has access to are displayed
6. Grant the Portal User access to the displayed portal(s) by checking the box in the **Grant Access** column
7. The Portal User's default security role will be selected; changing this role for specific portals is optional
8. Click **Save** to create the Portal User. Emails containing login information will be sent to the login ID (email address) of the Portal User

### Edit Portal Users



Access to Portal may be modified or terminated at any time. It is important to terminate access when no longer needed by the Portal User. If you need assistance, please contact [ST. CLAIR CPAs, P.C.].

	Last Name	First Name	Email	Default Security User Role
<input type="checkbox"/>	Bill	Smith	useremail@domain.com	Administrator
<input checked="" type="checkbox"/>	Portal	User	portaluser@domain.com	Standard User

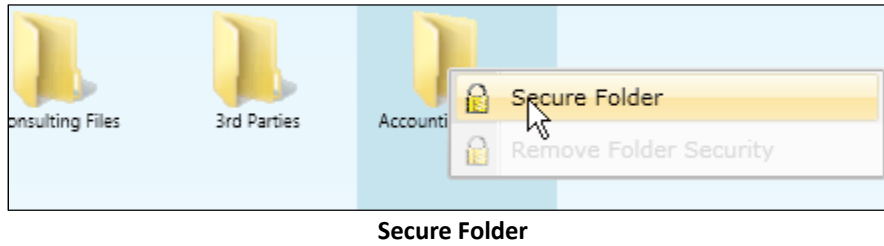
**Edit Portal User**



Click Manage Portal Users to edit or delete a Portal User. If access to the Portal is to be permanently terminated, simply click "Delete selected" to remove all Portal access.

## Folder Level Permissions

Portal Admin Users have the ability to restrict specific Portal Users from accessing selected folders within Portal.



Secure Folder



### Steps for Creating Folder Level Permissions

1. Right Click on the folder you wish to secure
2. Select **Secure Folder**
3. Choose Portal Users that will have rights to the folder by clicking the box to the left of the user's last name

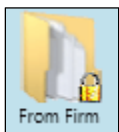
	Last Name	First Name	Email
<input checked="" type="checkbox"/>	Firm	Administrator	Nate.Brown@wolterskluwer.com
<input type="checkbox"/>	Nate	Brown	irish.nate.1979@gmail.com
<input type="checkbox"/>	Mary	Brown	mbrown.portal@gmail.com

Apply Folder Level Permissions to Portal Users

4. After selecting the Portal Users that will have access to the folder , click **Save**
5. A popup will display confirming the selected folder has been secured



To modify folder level permissions, right-click on a secured folder and select **Remove Folder Level Security**.



Secured Folder

Secured folders are easily identifiable as a lock icon is visible when navigating to folders on the Portal Homepage.

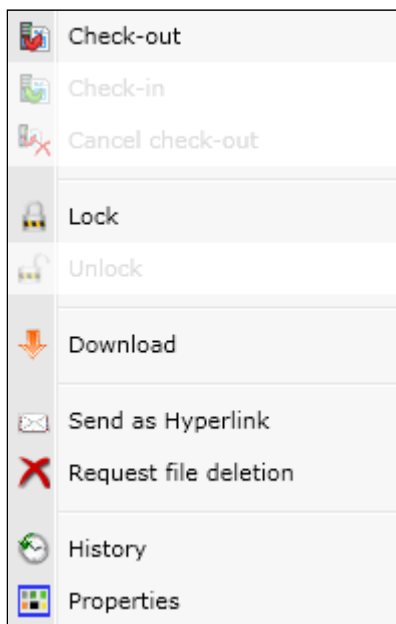
## The Right Click Menu



Right-click on any file to view the Menu for the file. The Right Click Menu contains options for modifying and working with files.



### Right Click Menu Key Features



Right Click Menu

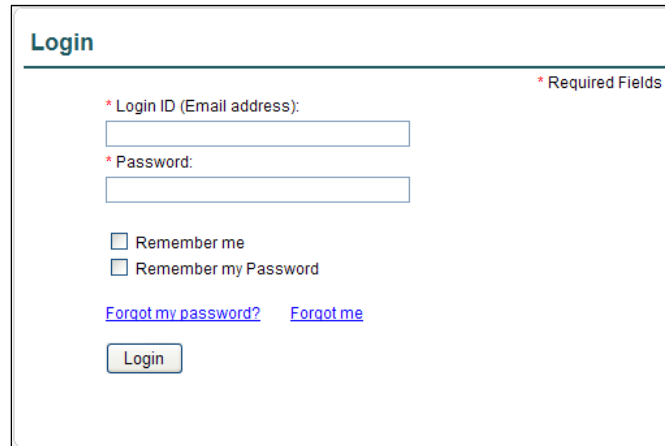
Check-out	Check-out	Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.
Check-in	Check-in	Add the checked-out file back to Portal to reflect any changes.
Cancel check-out	Cancel Check-out	This feature will make it as if the Check-out never occurred.
Lock	Lock\Unlock	Prevent file from being checked-out or deleted.
Unlock	Download	View or save file (same as double-clicking on file name).
Download	Send as Hyperlink	Send encrypted link via email. The recipient must be able to log-in to Portal in order to view the file.
Send as Hyperlink	Request file deletion	Requests file deletion by the firm.
Request file deletion	History	View each action performed to the file and the user who performed the action.
History	Properties	Rename or change the folder location for a file.
Properties		

## Simplified User Interface

The Simplified User Interface (SUI) is a basic, HTML interface designed for portal users who are not able to access Microsoft Silverlight. The functionality is limited. However, the core features of Portal are available, such as adding and downloading files.

### *Login to Portal*

Login to the SUI using the following URL: <https://portal.prosystemfx.com/sui>



The screenshot shows a login form titled "Login" with a horizontal line below the title. In the top right corner, there is a red asterisk followed by the text "\* Required Fields". The form contains two input fields: the first is labeled "\* Login ID (Email address):" and the second is labeled "\* Password:". Below these fields are two checkboxes: "Remember me" and "Remember my Password". At the bottom left, there are two blue hyperlinks: "Forgot my password?" and "Forgot me". At the bottom center, there is a "Login" button.

Figure 1 - SUI Login

## Portal Home Page

CCH Training Client, Inc. Firm Administrator (Firm Admin)  
Reset Password | Logout

Up One Level Back Reload Download Upload Help

Select portal to view files Click on a file to download it or click on a folder to open the folder

CCH Training Client, Inc.  
Jake Able

Collaboration

CCH Training Client, Inc.

	Name	Expiration Date	Date Modified	Modified By	Size (KB)
	<a href="#">Client Provided Files</a>		07/14/2010	Firm	
	<a href="#">Correspondence</a>		07/14/2010	Firm	
	<a href="#">Misc.</a>		07/14/2010	Firm	
	<a href="#">Perm Documents</a>		07/14/2010	Firm	
	<a href="#">Tax Returns</a>		07/14/2010	Firm	
<input type="checkbox"/>	<a href="#">2008 Form 1040.pdf</a>	12/31/9999	07/14/2010	Sven.Thiessen@wolterskluwer.com	53

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Figure 2 – Portal Home Page



### Home Page Key Features

- 1 Menu Bar** Used to navigate through Portal functionality.
- 2 Navigation Pane** Access a portal by clicking the portal name.
- 3 Files and Folders** View the list of folders, and files within the folders.




### Menu Bar Key Features

- Up One Level Move up one folder level within the Files and Folders.
- Back Return to the previous screen.
- Reload Refreshes the portal to reflect recent changes.
- Download Click to download the selected file. If multiple files are selected, a zip file containing the selected files is downloaded. Select files by clicking the box to the left of the file name.
- Upload Click Upload to add a file to the selected portal.
- Help Access Portal help files by clicking this icon.

## Download Files from Portal

A simple and easy way to download (view or save) a file is to double-click on the file. The **File Download Box** appears enabling the file to be saved or viewed.

## Add Files to Portal

Click  in the menu bar to initiate the add files process.

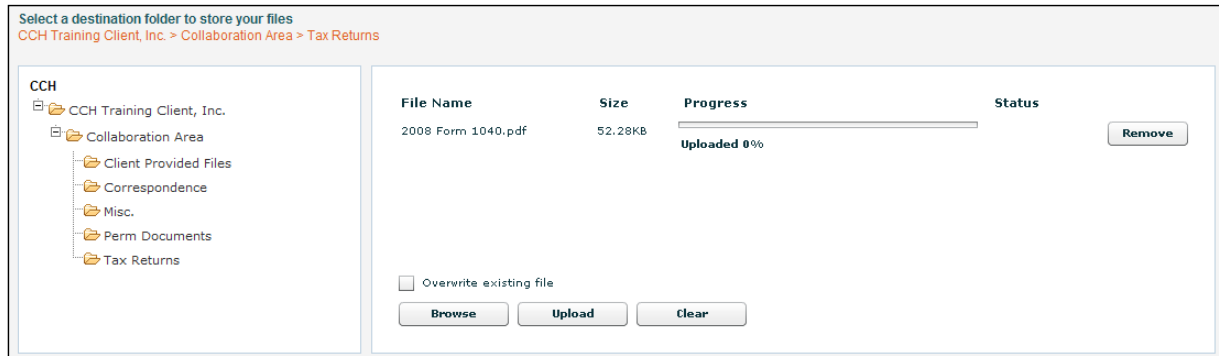



Figure 3 - Add Files to Portal



### Steps to add files to Portal

1. In the Folder Selection Pane, select the File Location (destination folder in Portal).
2. Click  and select file(s) to upload via Windows Explorer.
3. Verify the File Location and Click Upload to add the file(s) to Portal.