

ProSystem fx Portal Client User Guide

CLIENT USER GUIDE

Last Updated: 12/14/2012

This document is intended for CCH Customers licensed to use ProSystem fx Portal. The document is a template ready for customers to customize and distribute to their clients. To begin, search for "FirmName" and replace with the actual business name. Customize the cover page and text within the guide as appropriate to meet your firm policies. After the guide is customized it is recommended that the final document be converted to a PDF file for distribution to clients. This document is composed of multiple parts including a quick start guide and an advanced section for clients with more complex portal requirements. Portions of this document may be delivered to clients based on their needs. Individual tax clients may only need the system requirements and quick start section, whereas business clients with more complex needs will benefit from the entire document.

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 web-based application used for secure file transfers and continued access between FirmName and our clients. For a client, 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 FirmName's record retention and portal use policies.

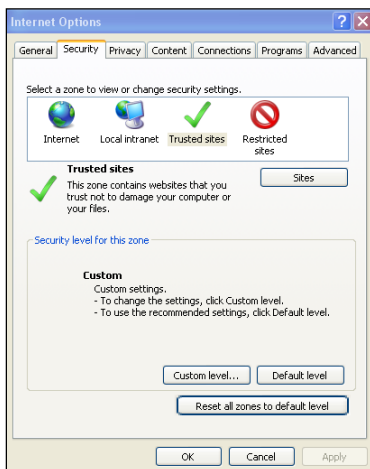
System Requirements

- Portal is built on a Microsoft Silverlight platform and a user may be prompted to install Silverlight from Microsoft's website. The installation typically takes less than one minute to complete and is completely safe.
- 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 4 can be found at <http://www.microsoft.com/getsilverlight/locale/en-us/html/installation-win-SL4.html>.

Internet Explorer



Internet Explorer users are required to add the portal URL to Trusted Sites.

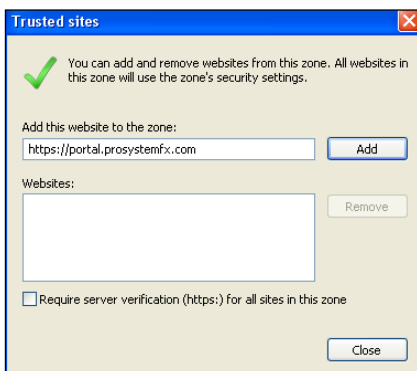


Internet Options



Internet Explorer Settings

1. Open Internet Explorer and browse to <https://portal.prosystemfx.com/portal>
2. In Internet Explorer, select Tools, Internet Options, and Security, then click Trusted Sites. See #3 below for the final step.



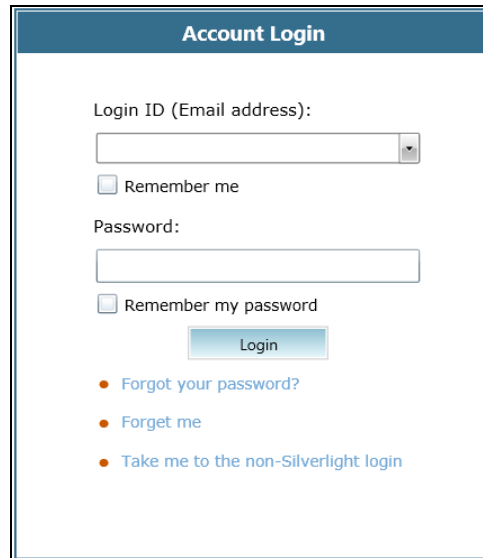
Trusted Sites

3. Click Add to move the Portal URL to the trusted sites zone, then click close.

Quick Start Guide

Portal Login

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



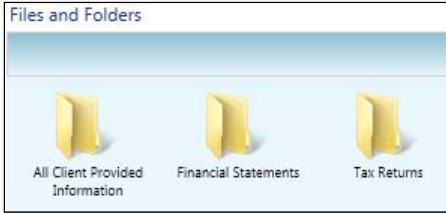
Portal Login



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.
- You will be required to change your password upon logging in for the first time and answer at least one security question. Your security questions can help you access your portal if you ever forget your password.
- Your new password; which 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?](#)”
- If you cannot, or prefer not to, install Silverlight on your machine, click “[Take me to the non-Silverlight login](#)” to use our lightweight version of the Portal that does not require Silverlight. Advanced features are not available from the non-Silverlight version of Portal.

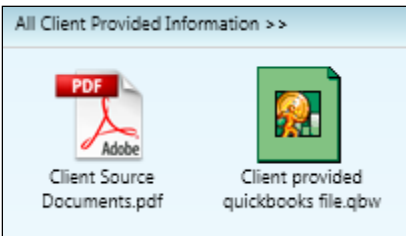
Download files from Portal



Files and Folders



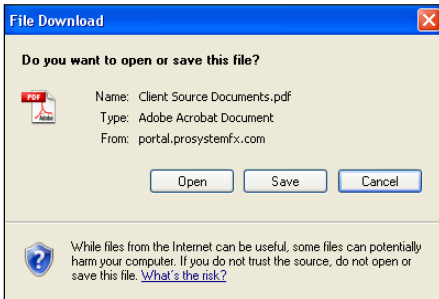
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



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 screen, displayed below.



File Download



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 affect the file on your portal.



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

Recent Portals

Enter portal name

Portals

1 Smith Properties, LLC

Saved searches

Smith Properties, LLC

Announcements

Portal Info

Portal Users : 3
Files : 0

Files and Folders

Tax

2 Smith Properties, LLC

Tax

Accounting

3 Add Files

4 Upload Files

View

2012 Tax Documents.pdf



Connected to Portal Server

Add Files



Steps to Add Files to Portal

On the Portal Home page:

1. Select a portal (only for those users that have access to multiple portals)
2. Select the file location (folder)
3. Click  to select file(s) via Windows Explorer or Drag and Drop files from your computer to the Files and Folders section
4. Click  to upload the file(s) to Portal

Advanced Features

- This section is intended to provide further 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.

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 access by the Portal Admin. Portal Users should only be created when Portal access is required by more than one person.

About User Roles



Being the Portal Admin means you are the primary user for the portal(s) that have been created for you or your organization.

Example of Advanced Portal Use

- You may find situations in which it is practical to grant portal access to a 3rd party. For example; a banker that you and the firm collaborate with on a regular basis. Before having access to Portal; options to exchange information included email, fax, CD-ROM or hard copy paper, and in many cases you had to request the document from the firm before you could provide it to the bank. As the Portal Admin, you may create a Portal User allowing your banker access to requested documents and the ability to add files at the request of you and the firm; considerably reducing the time and resources spent to exchange information. The security level of Portal far exceeds email, which is most often the primary medium of exchanging electronic files.
- If the firm has created more than one portal for you, you will be able to control which portal(s) your banker or other third party may view.
- Your firm's portal solution, may or may not, provide you with the ability to secure folders. If available, this feature allows the Portal Admin to control a Portal User's access to one or more folders within a portal.

Managing Portal

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



There are 3 steps to create Portal Users.

1. Create the Portal User
2. Grant the Portal User access to one or more portals
3. Choose the Portal User's File Management Role for each portal they can access

About File Management Roles



There are 5 File Management Roles that can be assigned.

1. Administrator – Allows Portal Users to perform all file operations.
2. Standard User – Allows Portal Users to perform the most common file operations.
3. Limited User – Allows Portal Users to perform a limited number of file operations.
4. Read-only User – Allows Portal Users to download files and review related information.
5. Upload-only User – Allows Portal Users to upload files and review related information.



Recommendations

- It is our recommendation that administration rights NOT be granted to Portal Users.



Administration tab defined

- Portal User Management - Create, modify and delete Portal Users.

Create Portal Users

Administration >> Setup >> Manage Portal User Manage Portal User

Search portals:

	Last Name	First Name	Email	Default Security User Role
<input checked="" type="checkbox"/>	Doe	John	johndoe@email.com	Administrator
<input type="checkbox"/>	Test Portal A	Test Portal A	TestPortalA@gmail.com	Limited User

Manage Portal Users



From the Administration tab; click “**Manage Portal Users**”, then click “**Create**”.

Personal Portal Access and Security

* Login ID (Email Address):

* Last Name:

* First Name:

* Default Security User Role:

Street Address:

City: State or Province: Zip or Postal Code:

Country:

Business Phone: Cell phone:

Enable Email Signature

Email Signature:

Create Portal User



On the Personal tab, enter the Login ID (email address), last and first name of the user; these are the only items that are required. The next step is to click the Portal Access and Security tab.

Administration >> Setup >> Manage Portal User >> Create Portal User Create Portal User

User Information - New User

Personal Portal Access and Security

<input type="checkbox"/>	Portal Name	Grant Access ¹	Access Expiration	File Management Role ²	Client Area
<input type="checkbox"/>	John Doe	<input checked="" type="checkbox"/>	Enter Date	Standard User	<input type="checkbox"/>
<input type="checkbox"/>	Test Portal A	<input type="checkbox"/>	Enter Date	Administrator Standard User Limited User Read-only User Upload Only User	<input type="checkbox"/>

Update Multiple Save ³ Cancel

Create Portal User



Assign a user to a Portal

1. All portals will be displayed, check the Grant Access box to allow access to a Portal.
2. Assign a File Management Role for Portal Users to the selected Portal.
3. Select **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 FirmName.

Administration >> Setup >> Manage Portal User Manage Portal User

Search portals:

	Last Name	First Name	Email	Default Security User Role
<input checked="" type="checkbox"/>	Doe	John	johndoe@email.com	Administrator
<input type="checkbox"/>	Test Portal A	Test Portal A	TestPortalA@gmail.com	Administrator

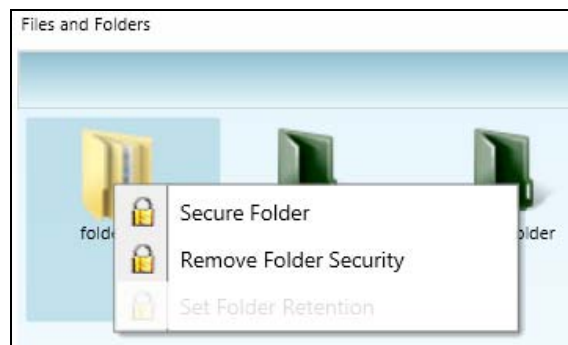
Edit Portal User



Select 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 Security

- By default, all Portal Users have access to a folder. Folder Security allows you to secure folders by controlling which Portal Users can access them.



Folder Menu



Right-click on any folder to access the Folder Menu for that folder. To secure a folder, select Secure Folder from the folder menu and select only the users that should have access to the folder. Folder security can be removed or edited at any time.

The Local File Menu

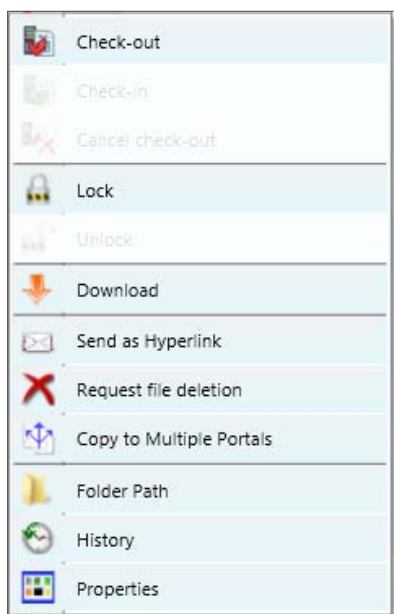
- The Local File Menu contains several options for modifying and working with files.



Right-click on any file to access the Local File Menu for that file.



Local File Menu Key Features



Right-Click Menu

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	Add the previously checked-out file back to Portal to reflect any changes.
Cancel Check-out	Check-in a previously checked-out file as if the Check-out never occurred.
Lock\Unlock	Prevent file from being checked-out or deleted.
Download	View or save file (same as double-click on file name).
Send as Hyperlink	Send encrypted link via email. The recipient must be able to log-in to Portal in order to view the file.
Request file deletion	Requests file deletion by the firm.
Copy to Multiple Portals	Copies a file to other portals that the Portal User has access to.
Folder Path	Move file to a new folder.
History	View each action performed to the file and the user who performed the action.
Properties	Rename or change the folder location for a file.

Quick Reference Guide

Portal Login

- Launch your internet browser and browse to <https://portal.prosystemfx.com/portal>
- Enter your Login ID and your temporary password. These can be found in the email you received from the firm.
- You will be required to change your password upon logging in for the first time and answer at least one security question.

Add Files to Portal

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the uploaded files should be stored.
- Click the Add Files button to select files or drag and drop files from your computer to the selected folder location.
- Click the Upload Files button.

Download Files from Portal

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the files you want to download are located.
- Right-click the file and select Download.