

Portal User Guide

RBM LLP

2012

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 RBM LLP 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 RBM LLP 's record retention and portal use policies.

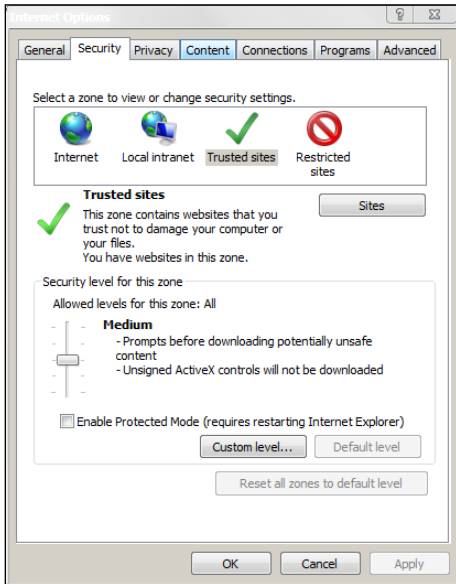
System Considerations

- Portal relies on the Microsoft Silverlight 4 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 4.
- A complete list of browsers and operating systems that support Silverlight 4 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>

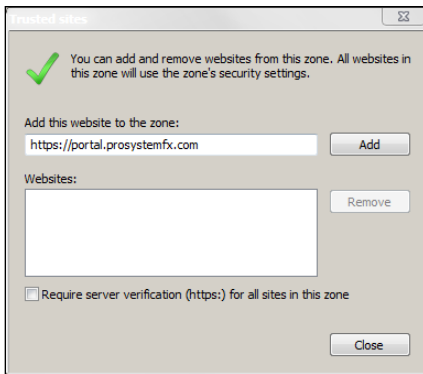
Internet Explorer



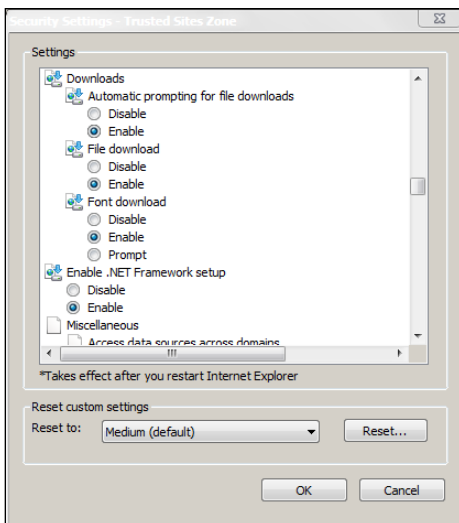
Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of ProSystem fx Portal, changing the following settings may allow for even easier use:



Internet Options



Trusted Sites



Custom Level



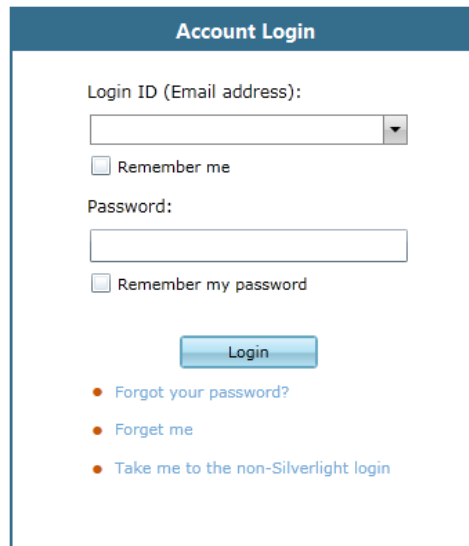
Internet Explorer Settings

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 web form titled "Account Login". It contains the following elements:

- A label "Login ID (Email address):" above a text input field with a dropdown arrow on the right.
- A checkbox labeled "Remember me" below the Login ID field.
- A label "Password:" above a text input field.
- A checkbox labeled "Remember my password" below the Password field.
- A blue "Login" button centered below the input fields.
- Three links with orange bullet points below the button:
 - [Forgot your password?](#)
 - [Forget me](#)
 - [Take me to the non-Silverlight login](#)

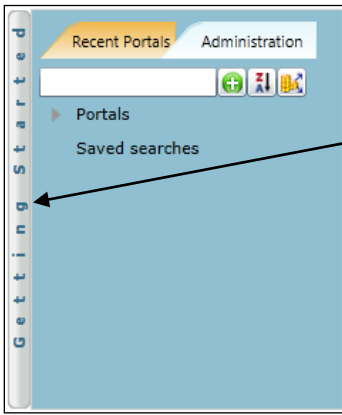
Portal Login



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?](#)"

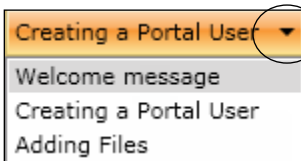
Getting Started



Getting Started ribbon



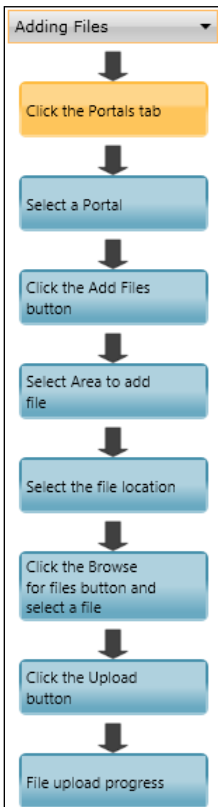
A short “**Welcome to the Portal!**” message will be presented to each user upon their initial login to Portal. The welcome message simply directs users to the expandable/collapsible **Getting Started** menu. Click the **Getting Started** ribbon on the left side of the screen to expand and view this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



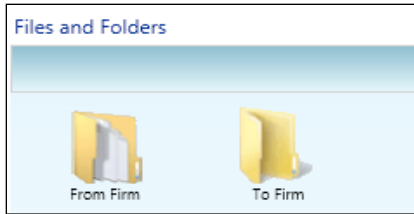
Adding Files



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.

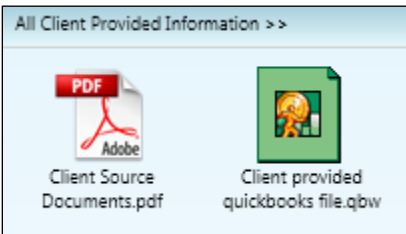
Download files from Portal



Files and Folders



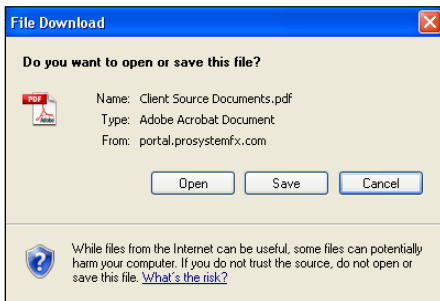
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



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. Row 1: 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 3rd 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 3rd 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 may terminate portal access.

Managing Portal

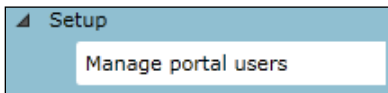
The Portal Admin may easily grant Portal access to others by creating Portal Users.



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 RBM LLP .

	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

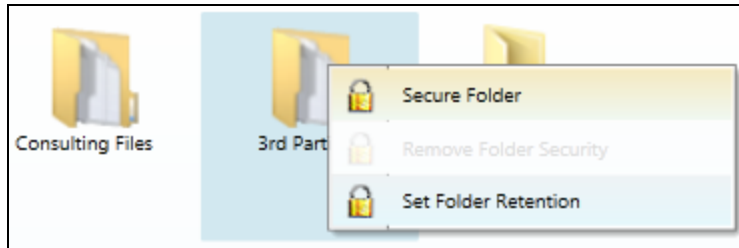
Edit Portal User



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

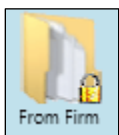
	Last Name	First Name	Email
<input checked="" type="checkbox"/>	Firm	Administrator	Nate.Brown@wolterskluwer.com
<input type="checkbox"/>	Nate	Brown	irish.nate.1979@gmail.com
<input type="checkbox"/>	Mary	Brown	mbrown.portal@gmail.com

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**.

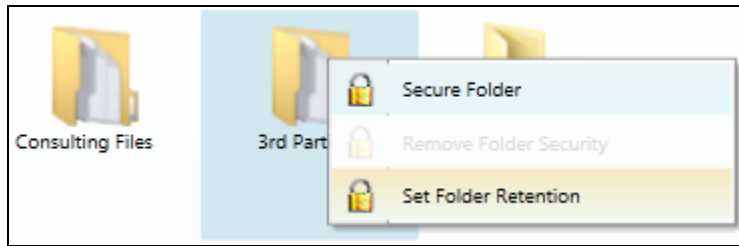


Secured Folder

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

Set Folder Retention

Portal Admin Users have the ability to change a folder's retention period. The folder's retention period determines the expiration date of any files added to that folder.

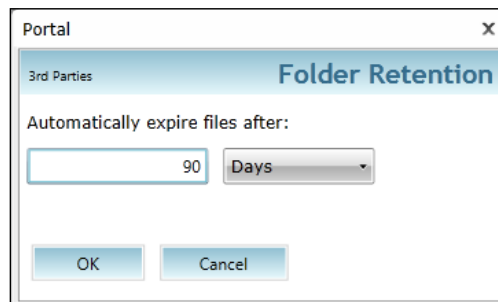


Set Folder Retention



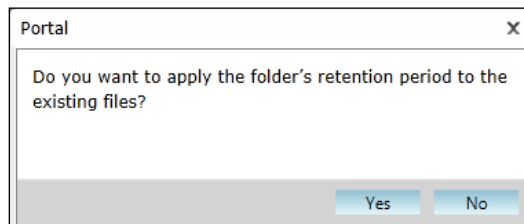
Steps for Setting Folder Retention

1. Right click on the folder for which you wish to change the retention period.
2. Select **Set Folder Retention**.
3. Enter the desired retention period for files stored in the folder. You can choose to expire files after a specified number of days, weeks, months, or years.



Setting the Retention Period

4. After selecting the folder's retention period, click **OK** to apply the change.
5. If the folder contains files, you will be asked if you want to apply the change to the folder's contents. Choose Yes or No.



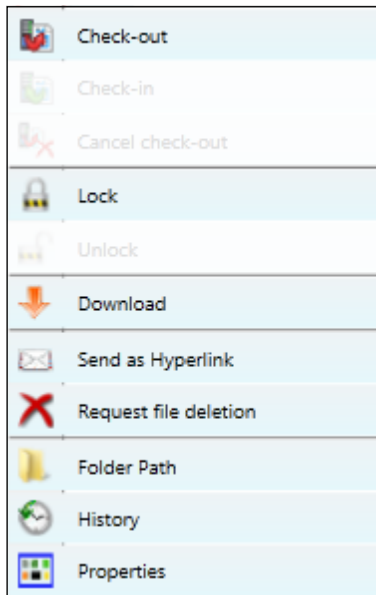
Choosing to Apply to Existing Files

6. A popup will display confirming the change.



Please check with the Firm prior to making any changes to the folder retention settings.

The Right Click Menu



Right Click Menu



To access the Right Click Menu, **right click** on any file.



Right Click Menu Key Features

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 a checked-out file back in to Portal to reflect any changes made.
Cancel check-out	Make it as if the Check-out never occurred. Any changes to the file will be lost.
Lock	Prevents Check-out, changes to and deletion of a file.
Unlock	You may modify the file when unlocked. The user who locked the file may unlock the file.
Download	Select to open or save the file; this is the same as double clicking on a file.
Send as Hyperlink	Send the file as a hyperlink via email. The recipient must be a Portal User, as Portal login is required to view the file. Upon login, the user is prompted to view or save the file.
Request file deletion	Send an email to the firm to let us know that you would like the file to be deleted.
Folder Path	Move the file to another folder. If applicable, you can choose to have Portal change the file's expiration date to match the new folder's retention settings.
History	View a complete history of each operation performed on a file.
Properties	View and modify properties such as file name, keyword, and folder location.



When checking out a file, you will have an option to email the file as an attachment. It is important to note this attachment will **not be** encrypted.

File Properties

The screenshot shows a 'File Properties' dialog box for a file named '2010 Tax Notice Response.doc'. The dialog is divided into two main sections. The left section lists file metadata: File name, File type (Word document icon), File size (27 KB), Portal name (Test1), Created date (10/21/2011), Created by (test1.portal@genericmail.info), Last modified on (10/27/2011), Modified by (test1.firmuser@genericmail.info), Last accessed on (10/27/2011), and File status (indicated by a green dot). The right section contains fields for Folder path (\\To Firm), Expiration date (1/19/2012), Keywords, Notes, and Portal edit mode (On). At the bottom are 'Save' and 'Close' buttons. Four numbered callouts are present: '1' points to the file name field, '2' points to the Keywords field, '3' points to the Folder path field, and '4' points to the Save button.

File Properties



File Properties Key Features

1. Rename a file (note that you do not need to worry about the extension, e.g. .docx, .xlsx, etc.)
2. In this area, you can modify the file's Keywords and Notes. The file's Expiration Date can be changed here as well, if appropriate.
3. Click to change the folder location of a file, thereby moving the file to that folder.
4. Click Save, and then Close to apply all changes.



Please check with the Firm prior to making any changes to the folder retention settings.

Simplified User Interface

The Simplified User Interface (SUI) is suitable for use on mobile/tablet devices. It provides a basic, HTML interface designed for portal users who are not able to access Microsoft Silverlight. Without Silverlight, only the core features of Portal can be made available, such as adding and downloading files.

A link to the Simplified User Interface can be found on the login screen of the Standard User Interface (“Silverlight Version”). For direct access, go to: <https://portal.prosystemfx.com/sui>

Login * Required Fields

* Login ID (Email address):

* Password:

Remember me
 Remember my Password

[Forgot my password?](#) [Forgot me](#)

SUI Login

Portal Home Page

CCH ▶ CCH Training Client, Inc. Firm Administrator (Firm Admin)
[Reset Password](#) | [Logout](#)

Up One Level **1** Back Reload Download Upload

Select portal to view files: **2**

CCH Training Client, Inc.
Jake Able

Collaboration

CCH Training Client, Inc.

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

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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

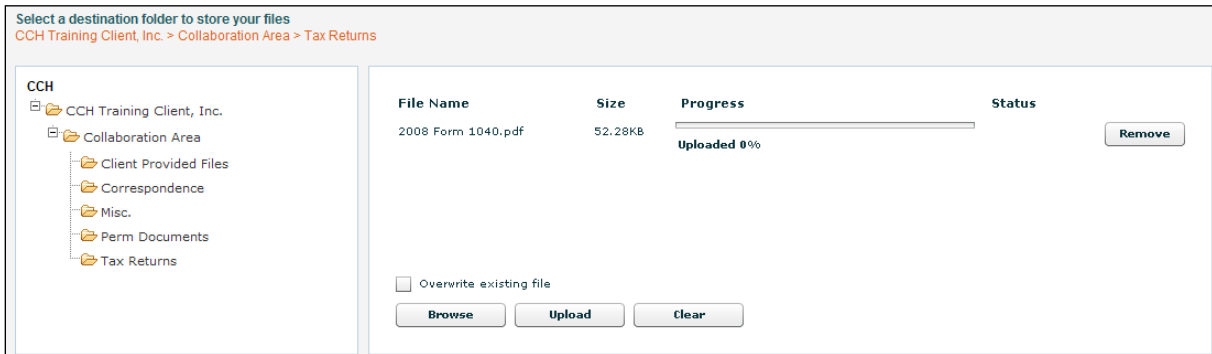
- Up One Level** Move up one folder level within the Files and Folders.
- Back** Return to the previous screen.
- Reload** Refreshes the portal to reflect recent changes.
- Download** Click to download the selected file. Multiple files are downloaded as a single zip file. Select files by clicking the box to the left of the file name.
- Upload** Click Upload to add a file to the selected portal.

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.



File Name	Size	Progress	Status
2008 Form 1040.pdf	52.28KB	Uploaded 0%	<button>Remove</button>


Overwrite existing file

Browse Upload Clear

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.