

# 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 Ubernosky & Majeres, PLLC 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 Ubernosky & Majeres, PLLC's record retention and portal use policies.

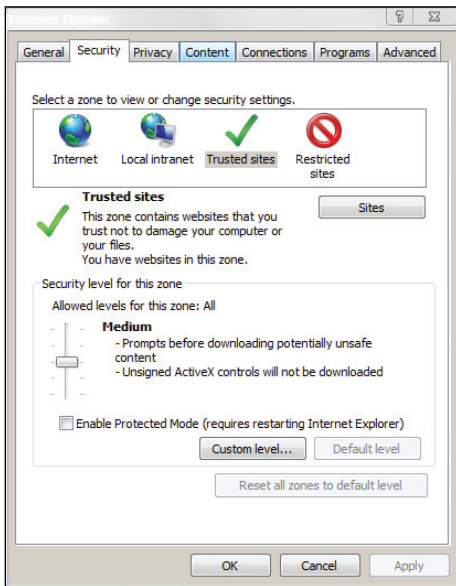
## System Requirements

- 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>

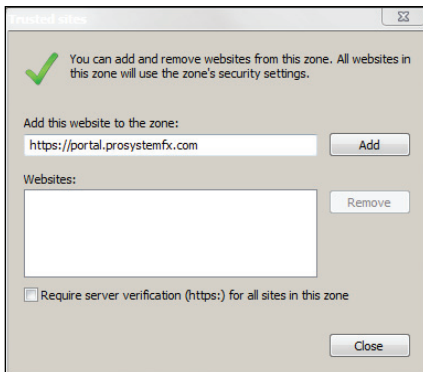
## Internet Explorer



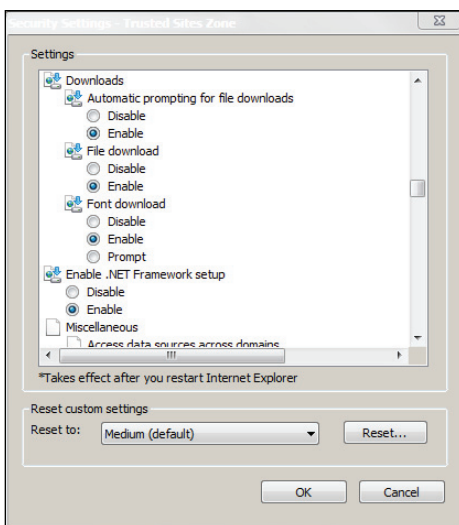
Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of ProSystem fx Portal, changing the following settings may allow for even easier use:



**Internet Options**



**Trusted Sites**



**Custom Level**



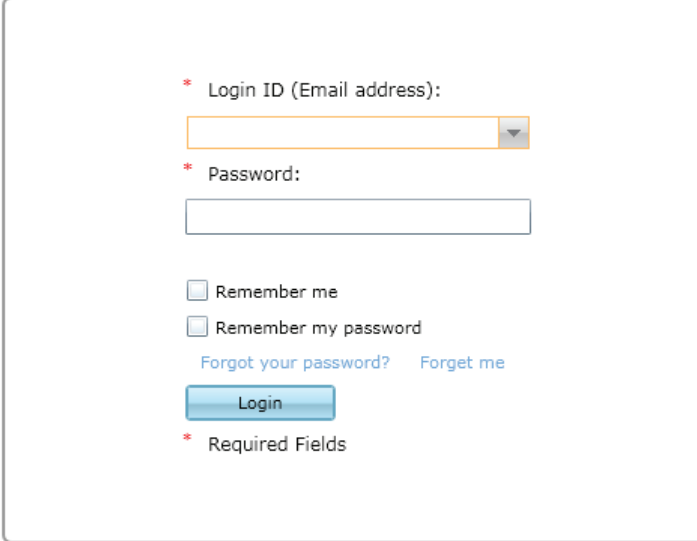
### Internet Explorer Settings

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.
6. 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 label: **\* Login ID (Email address):**
- An input field with a dropdown arrow on the right side.
- A label: **\* Password:**
- A password input field.
- Two checkboxes:  Remember me and  Remember my password.
- Two links: [Forgot your password?](#) and [Forget me](#).
- A blue button labeled **Login**.
- A note: **\* Required Fields**.

**Portal Login**

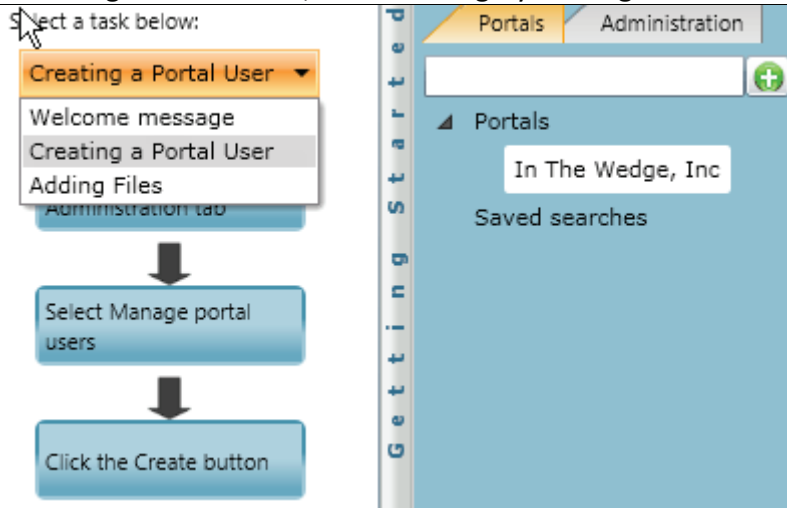


### Login Tips

- 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?](#)"

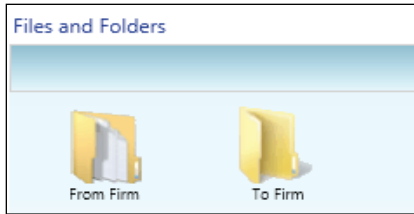
## Getting Started Menu

When you log into Portal for the first time you are greeted with a welcome message. After reading the welcome message the Getting Started Menu is available on the left side of the page. The Getting Started Menu assists users with basic functionality within Portal. The Getting Started Menu is specific to the type of user logging in. To collapse the Getting Started menu, click on the gray Getting Started bar



Getting Started Menu

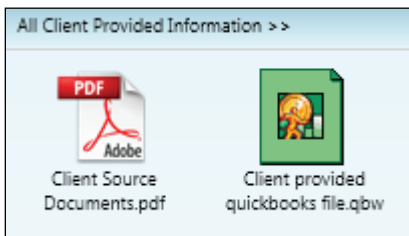
## Download files from Portal



**Files and Folders**



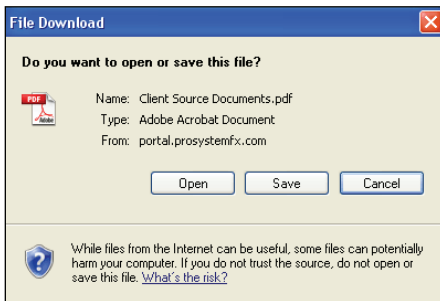
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



**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

5 Firm >> Add Files Add files

Set File Properties

1 Portal:

2 Select File Location:

- ▶ CCH Training Client
  - ▶ From Firm
  - ▶ To Firm

Area:

Keywords:

| <input checked="" type="checkbox"/> | File Name                      | Portal Name        | File Location | Area          | Keywords |
|-------------------------------------|--------------------------------|--------------------|---------------|---------------|----------|
| <input checked="" type="checkbox"/> | 12-31-09 Form 1065 Client Copy | CCH Consulting and | From Firm     | Collaboration |          |

3

File Upload Progress

| File Name | Size | Progress | Status |
|-----------|------|----------|--------|
|-----------|------|----------|--------|

Connected to Portal Server

4

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

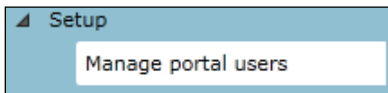
- The Portal Admin may easily grant Portal access to others by creating Portal Users.



There are 2 steps to create Portal Users.

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

## Create Portal Users



Manage Portal Users



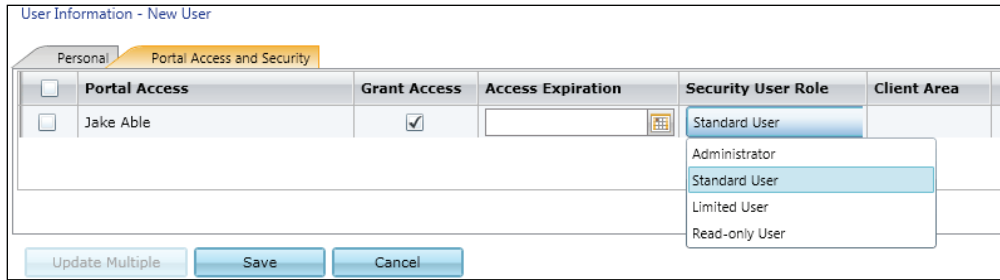
From the **Administration** tab, click **Manage Portal Users**, then click **Create** at the bottom of the page.

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



**Create Portal User**



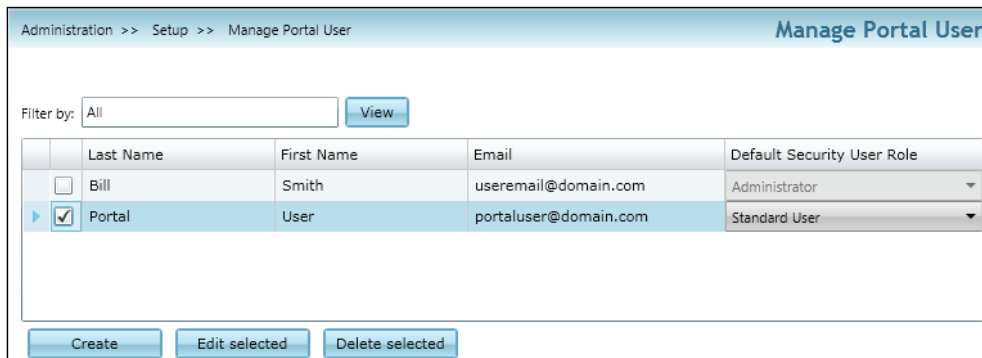
### Assign Portal Access and Security

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 Ubersnosky & Majeres, PLLC.



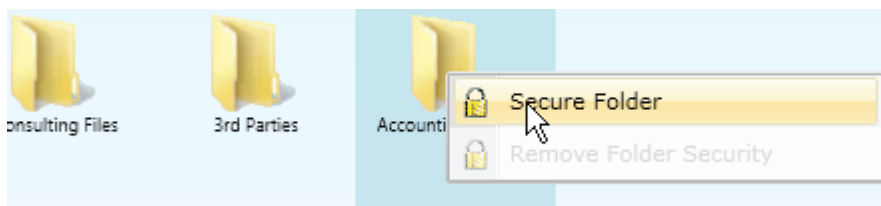
**Edit Portal User**



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 Administrators have the ability to restrict other portal users from accessing selected folders within portal.



**Folder Level Permissions**



## Steps for Creating Folder Level Permissions

- Right Click on the folder you wish to secure
- Select **Secure Folder**
- Select users you wish to have access to the folder by checking the box next to their 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      |

### Applying Folder Level Permission

- After making your selections, click **Save**. A popup will appear confirming that you have secured the folder and on the Portal homepage, the folder will have a lock icon next to the folder, indication that it is secured.

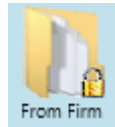


Figure 29 - Secured Folder

- To **Remove Folder Level Security**, right click on the folder and select the second option

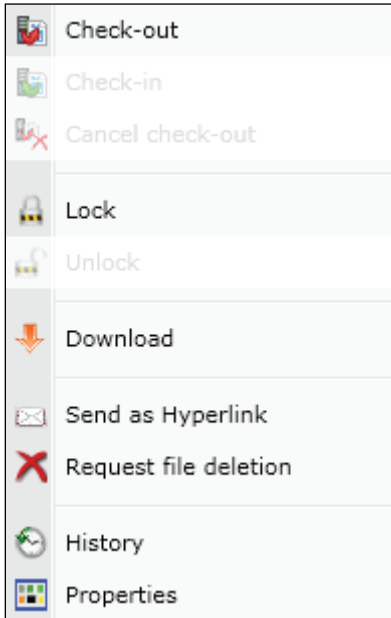
## The Right Click Menu



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            |                       |   |