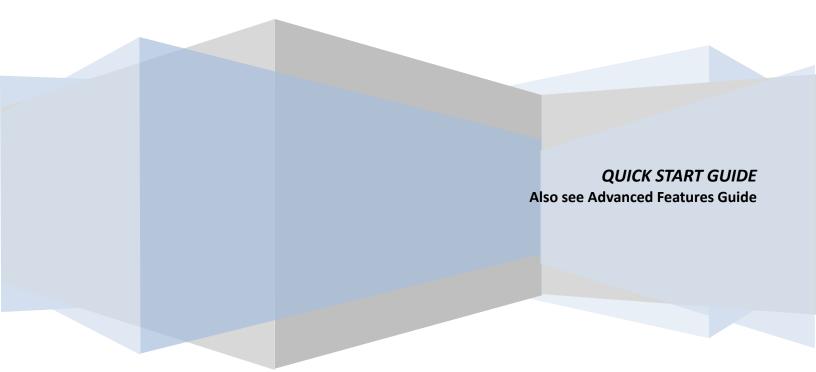


# **ProSystem fx Portal Client User Guide**

Getting Started March 1, 2013



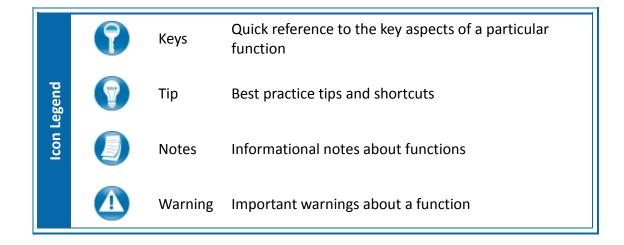
### About ProSystem *fx* Portal

Portal is a simple and easy to use Web application that facilitates secure file transfers and continued access between Blair & Company, CPAs 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 the firm's record retention and portal use policies. At this writing, we anticipate retaining at least three (3) years' information. We will contact you prior to deleting information, unless it is clearly inconsequential or temporary in nature.

#### **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 <a href="http://www.microsoft.com/silverlight/get-started/install/default.aspx">http://www.microsoft.com/silverlight/get-started/install/default.aspx</a>
- 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. <u>http://support.apple.com/kb/HT1531</u>



### 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:

General Security Privacy Content Connections Programs Advanced
Select a zone to view or change security settings.
🛯 🥥 🔩 🗸 🚫
Internet Local intranet Trusted sites Restricted sites
Trusted sites Sites Sites Sites Sites Sites Sites Sites You files.
Security level for this zone
Allowed levels for this zone: All
Prompts before downloading potentially unsafe     content     Unsigned ActiveX controls will not be downloaded
Enable Protected Mode (requires restarting Internet Explorer)
Custom level Default level
Reset all zones to default level
OK Cancel Apply

#### **Internet Options**

Trusted sites	E S
You can add and remove websites from this zor this zone will use the zone's security settings.	ne. All websites in
Add this website to the zone:	
https://portal.prosystemfx.com	Add
Websites:	
	Remove
Require server verification (https:) for all sites in this	zone
	Close



nty Settings - Trusted Sites Zone	l
ettings	
🛃 Downloads	
Automatic prompting for file download	s
Disable	
Enable	
🛃 File download	
Disable	
Enable	
🛃 Font download	
Disable	
Enable	
Prompt	
Enable .NET Framework setup	
Disable	
Enable	
Miscellaneous	-
Δcress data sources across domains	•
*Takes effect after you restart Internet Explore	er
eset custom settings	
eset to: Medium (default)	<ul> <li>Reset</li> </ul>
	OK Cancel

1.

2 23

#### Internet Explorer Settings

- Open Internet Explorer and browse to <u>https://portal.prosystemfx.com/portal</u>
- 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.

**Custom Level** 

# **Quick Start Guide**

### **Portal Login**

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

* Login ID (Empil address);
* Login ID (Email address):
-
* Password:
Remember me
Remember my password
Forgot your password? Forget me
Login
* Required Fields
responsed risks

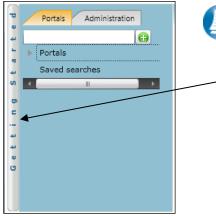
#### **Portal Login**



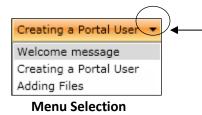
#### Login Tips

- 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** 



Adding Files Click the Portals tab Select a Portal Click the Add Files button Select Area to add file Select Area to add file Click the file location Click the Browse for files button and select a file Click the Upload button

File upload progress
Adding Files

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.

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.** 

#### **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.



Also see the Advanced Features User Guide

http://www.blaircpas.com/info\_center.html

### Download files from Portal



#### **Files and Folders**



#### **Portal Documents**

File Dov	rnload 🛛 🔀
Do you	want to open or save this file?
FOF	Name: Client Source Documents.pdf Type: Adobe Acrobat Document From: portal.prosystemfx.com
2	Open Save Cancel  While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>

#### **File Download Box**



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



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.

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

Area: Collabo Keywords	aining Client	<b>v</b>		Ja F	ation: I Training Client rom Firm o Firm			
	File Name 12-31-09 Form 1065		tal Name H Consulting and	File Location From Firm	Area	aboration	Keywords	
<u> </u>								
Ţ	vse for Files 🛛 💀 🖓 Appl	ly to Selected	X Remove Selec	ted File 🛯 🕅 Copy to	Multiple Portals			
Τ	oad Progress	ly to Selected	Remove Selec	ted File 🖄 Copy to Progress	Multiple Portals Status			





Steps to Add Files to Portal

On the Portal Home page; click General 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

# **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: <u>https://portal.prosystemfx.com/sui</u>

Login	
* Login ID (Email address):	* Required Fields
* Password:	
Remember me Remember my Password	
Forgot my password? Forgot me	
Login	

Figure 1 - SUI Login

### Portal Home Page

🏦 Up One Level	<table-cell-rows> 😔 矣</table-cell-rows>	: 🏹 Reload	🦊 Download 🛛 🔞	Upload	$\begin{pmatrix} 1 \end{pmatrix}$	н 🕥 н
elect portal to view files		Click on a file to download it or	click on a folder to open the fol	ler		
	7	Collaboration				
CCH Training Client, Inc. Jake Able		CCH Training Client, Inc.	(			[
$\bigcirc$		Name	Expiration Da	e Date Modified	Modified By	Size (KB)
(2)		Client Provided File	<u>15</u>	07/14/2010	Firm	
$\smile$		Correspondence		07/14/2010	Firm	
		🖾 <u>Misc.</u>		07/14/2010	Firm	
		Perm Documents		07/14/2010	Firm (3)	
		Tax Returns		07/14/2010	Firm	
		2008 Form 1040.pd	<u>df</u> 12/31/9999	07/14/2010	Sven.Thiessen@wolterskluwer.com	53

Figure 2 – Portal Home Page

7	Home Page Key Fe	eatures
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**



Move up one folder level within the Files and Folders.



Return to the previous screen.



Refreshes the portal to reflect recent changes.



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.



Click Upload to add a file to the selected portal.



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

🔁 CCH Training Client, Inc.	File Name	Size	Progress	Status	
😑 🗁 Collaboration Area	2008 Form 1040.pdf	52.28KB	Uploaded 0%		Remove
Client Provided Files					
··· 🗁 Misc.					
Tax Returns					

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 Browse and select file(s) to upload via Windows Explorer.
- 3. Verify the File Location and Click Upload to add the file(s) to Portal.