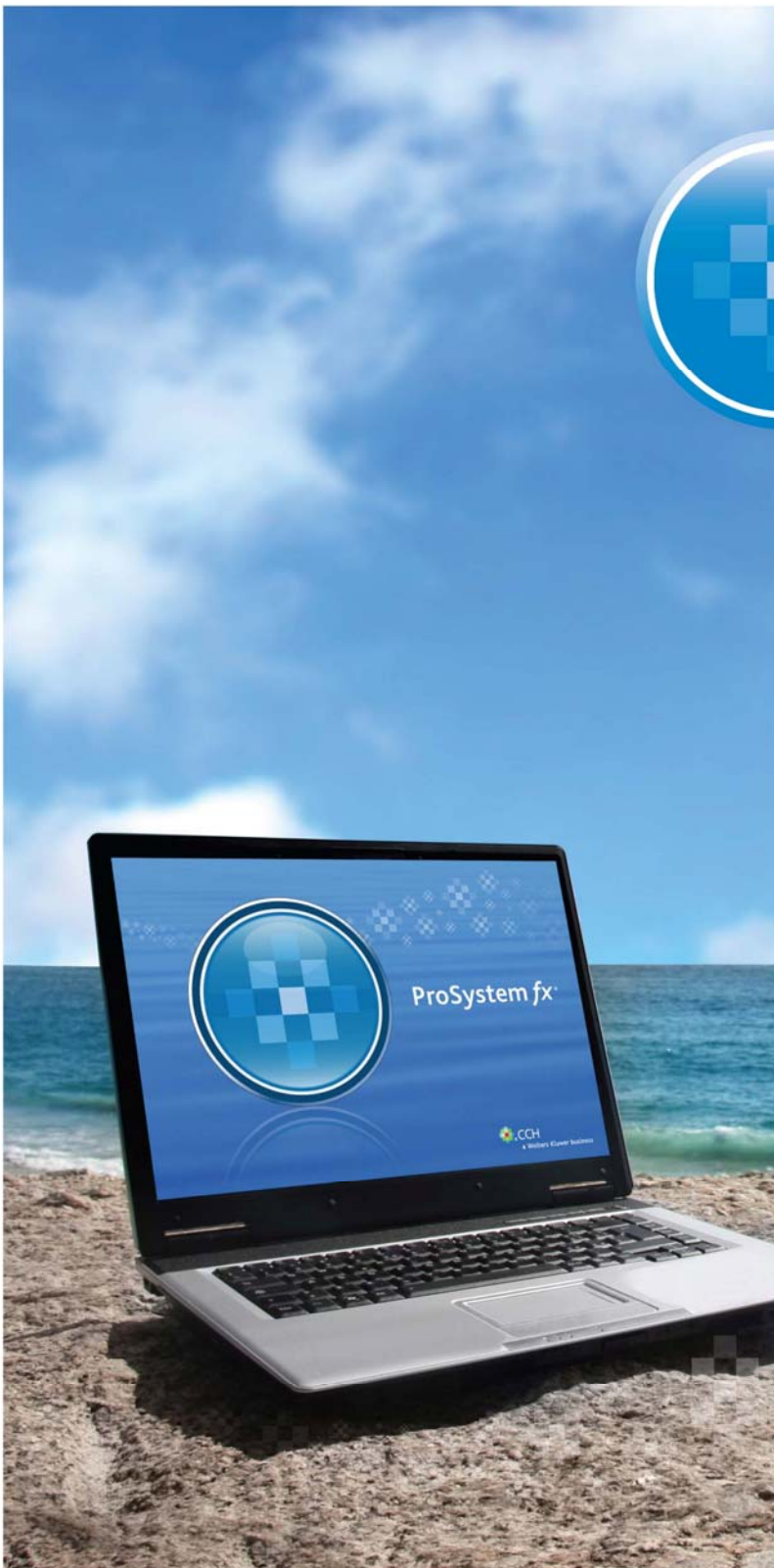




ProSystem *fx*<sup>®</sup>  
Portal

End User Training



Training and Consulting







## Introduction

This course provides introductory training on ProSystem fx Portal. Portal is a quick and secure file exchange application that enables accounting firms to both transfer and receive electronic files in a secure environment. There is no file upload size limit associated with Portal, which also makes it a perfect tool for the transmission of very large files. This course will cover basic functions and features for using ProSystem fx Portal in the accounting firm environment.

## Continuing Professional Education

Each Participant should complete an online Customer Feedback Form by browsing to the following URL:

[www.cchgroup.com/training/feedback](http://www.cchgroup.com/training/feedback)






This course qualifies for (1) hour of credit.

\*\*CPE Qualification may vary by state\*\*

## Objectives

Upon completion of this course, you should be able to:

- Understand the System Requirements and Browser Options
- Understand User Perspectives and Roles in Portal
- Understand the Components of the Portal Home Page
- Add Files to Portal
- Search for Files within Portal
- Work with Files within Portal

Icon Legend		
	Keys	Quick reference to the key aspects of a particular function
	Tip	Best practice tips and shortcuts
	Notes	Informational notes about functions
	Write	Steps or information to write down
	Caution	Important Warnings about a function



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## System Requirements

- Portal relies on the Microsoft Silverlight platform and users may be prompted to install Silverlight the first time they login. The installation typically takes less than one minute to complete and is completely safe.
- Portal will support all Web browsers on PC and Mac that are compatible with Microsoft Silverlight 3.
- A complete list of browsers and operating systems that support Silverlight can be found at <http://www.microsoft.com/getsilverlight/get-started/install/default.aspx>.
- Mac computers with Intel processors are able to access Portal.
- Mac users may browse to the link below to verify the 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 in most configurations, for greater ease of use you may want to modify some of Internet Explorer's security settings as outlined below:

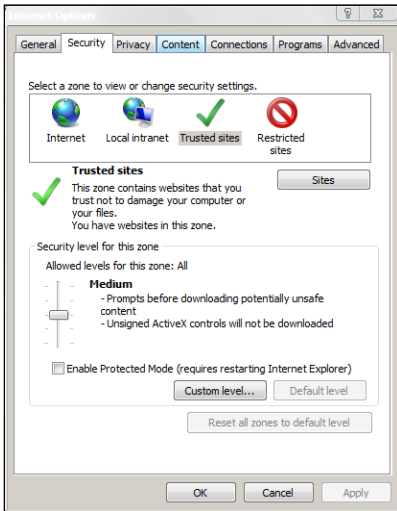


Figure 1 – Internet Options



### Internet Explorer Settings

1. Open Internet Explorer and browse to <https://portal.prosystemfx.com/portal>
2. On the Internet Explorer toolbar click, **Tools, Internet Options, Security**, highlight **Trusted sites** and then click **Sites**.

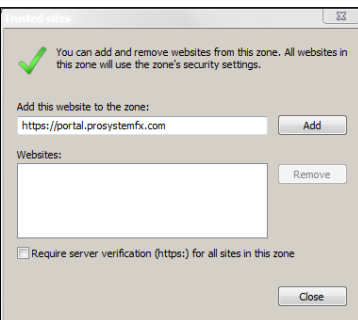


Figure 2 – Trusted Sites

3. Click **Add** to move the Portal URL to the Trusted sites zone, and then click **Close**.

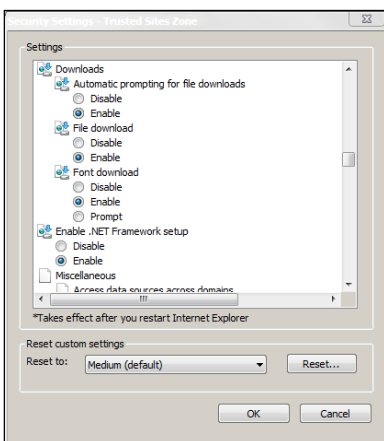


Figure 3 - Enable Downloads

4. Click **Custom Level** (refer to Figure 1)
5. Click **Enable** for Automatic Prompting for file downloads.
6. Click **Enable** for File Download.
7. Click **OK** to save the changes.



## Defining Roles and User Perspectives

### *Portal User Perspectives*

#### **Collaboration Area**

Firms and their clients exchange files through the Collaboration Area. It is created by default during portal creation. Firm Users of Portal only upload and work with files in the Collaboration Area.

#### **Client Area**

Firms can create (if licenses are available) an optional storage area that their clients can utilize for their own electronic file storage purposes. Firm Users have no access to a client's Client Area portal.

### *Portal User Roles*

#### **Firm Admin**

The Firm Admin is the first user created for a firm after their order for Portal is processed. The email address entered on the Portal order form will receive the Welcome Email notifications from CCH with the temporary password and login instructions. The Firm Admin will have all administrative rights within Portal and will be responsible for setting up the first portal in the system and creating all other Firm Users.

#### **Firm User**

The Firm Users are the employees of the firm who will need access to the Portal. Their business email addresses will be used for their Login ID's. The Firm Admin will create the other Firm Users.

#### **Portal Admin**

The Portal Admin is a client of the firm (either the primary taxpayer or primary client contact) who can access the portal, perform all basic portal-related functions, and control which other Portal Users have access to their portal. The client's email address will be used to create the Portal Admin account.

#### **Portal User**

The Portal Users are the other client-side users of Portal who will be setup by the Portal Admin using an appropriate email address.



## Portal Login

\* Login ID (Email address):

\* Password:

Remember me  
 Remember my password

[Forgot your password?](#) [Forget me](#)

\* Required Fields

Figure 4 - Portal Login



### Login Tips

- The Login ID is **not** case sensitive.
- Password must contain at least one upper-case alpha character, one number, and one special character (e.g. !, @, #, etc.).
- The Password is case sensitive and must be between 8 and 32 characters.



When you are logging into Portal on a shared Computer, consider clicking [Forget me](#) on the log in window to remove your login credentials from that computer.



Create a bookmark or desktop shortcut to help you quickly and easily navigate back to the login page.



## Getting Started

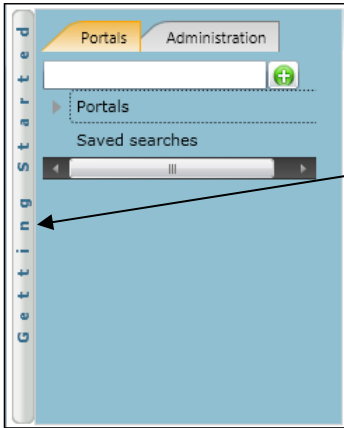


Figure 5 – Getting Started Ribbon



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.

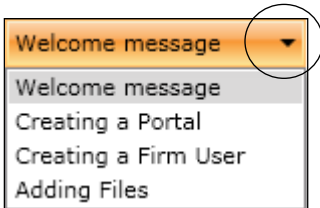


Figure 6 – Menu Selection



Click the black arrow (figure 6) to view **Getting Started** menu options. Creating a Portal and Creating a Firm User menu will only be visible to those Firm Users with administrative rights. **Adding Files will be visible to all Firm Users.**

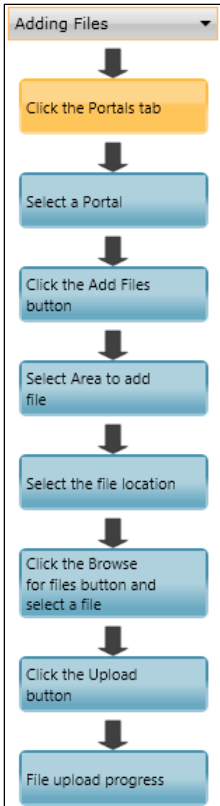


Figure 7 – Adding Files



### Getting Started menu Key Features

- When clicking on the buttons in figure 7, 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 as live client related files (e.g. Returns, Financial Statements) are added to Portal.



### Portal Home Page

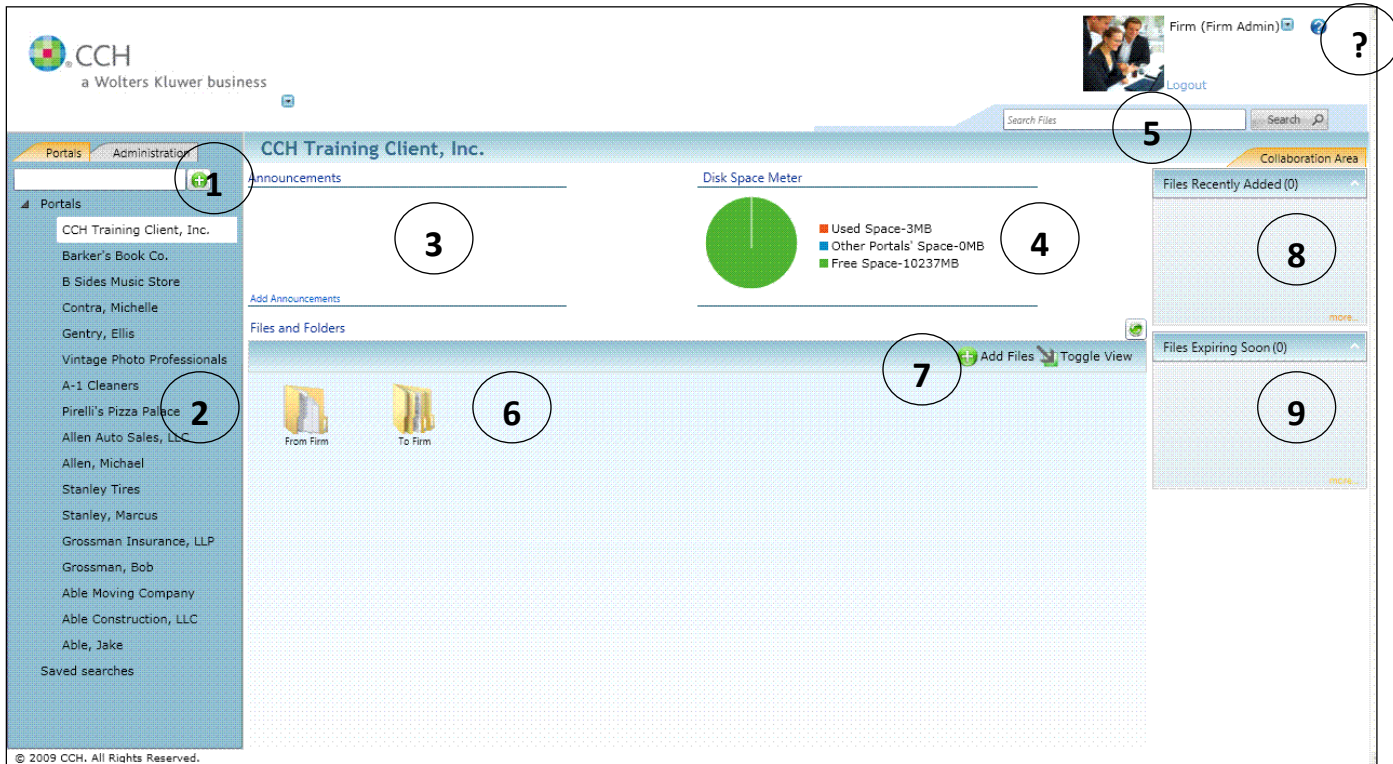



Figure 8 – Portal Home Page



### Portal Home Page Key Features

- 1 Portal Lookup** Search for a specific portal within your list of portals.
- 2 Navigation Panel** Displays links to available portals and administrator options.
- 3 Announcements** Displays announcements associated with the selected portal.
- 4 Disk Space Meter** Displays the amount of space used, space used by other portals, and free space.
- 5 Search Box** Search Portal based on portal name, file name, folder template, or folder name.
- 6 Files and Folders** View the list of folders, subfolders, and files within those folders.
- 7 Add Files** Click Add Files to add a file to the selected portal.
- 8 Files Recently Added** View and access a short list of the most recently added files by all Portal Users.
- 9 Files Expiring Soon** Displays a short list of files that about to expire and move to the Recycle Bin.
- ? Web Help** Portal help files can be accessed by clicking on the  icon.



Files Recently Added and Files Expiring Soon are displayed on the right side of the Portal Home Page. Hover over a file name to view the Portal and Folder the file resides in or click the title box to see each category in a full screen view.



## Add Files to Portal

The screenshot shows the 'Add Files to Portal' window. At the top left, there is a 'Back' button (callout 6) and a breadcrumb 'Firm >> Add Files'. The main area is divided into two sections: 'Set File Properties' and 'Select File Location'. In 'Set File Properties', there is a 'Portal:' text box with 'Jake Able' (callout 1), an 'Area:' dropdown menu set to 'Collaboration', and a 'Keywords:' text box with the placeholder 'Enter Keywords separated by commas' (callout 3). In 'Select File Location', there is a tree view with 'Jake Able' (callout 2) expanded to show 'From Firm' and 'To Firm' options. Below these sections is a table with columns: File Name, Portal Name, File Location, Area, and Keywords. Under the table are buttons: 'Browse for Files' (callout 4), 'Apply to Selected', 'Remove Selected File', and 'Copy to Multiple Portals'. Below the buttons is a 'File Upload Progress' section with a table with columns: File Name, Size, Progress, and Status. At the bottom of the progress section are buttons: 'Pause All', 'Resume All', 'Clear Completed', and 'Remove selected file'. At the very bottom right are 'Upload' (callout 5) and 'Cancel' buttons. A status bar at the bottom left says 'Connected to Portal Server'.

Figure 9 – Add Files to Portal



### Steps to Add Files to Portal

1. Select the **Portal** by typing any part of the portal name. Use this option to choose any Portal the firm has enabled you to access and work with.
2. Select the **File Location** (destination folder in Portal).
3. Apply **Keyword(s)** if applicable. Keywords are tags used to search for and filter files.
4. Click **Browse for files** and select file(s) to upload via Windows Explorer.
5. Verify properties applied and click **Upload** to add the file(s) to the portal.
6. Click the **Back** button at the top of the screen to return to the Portal Home Page.



File Properties may be applied or changed after being selected for upload by using the check-box to the left of the filename and using the **Apply to selected** option.



### Copy to Multiple Portals



Copy one file to multiple portals at a time.

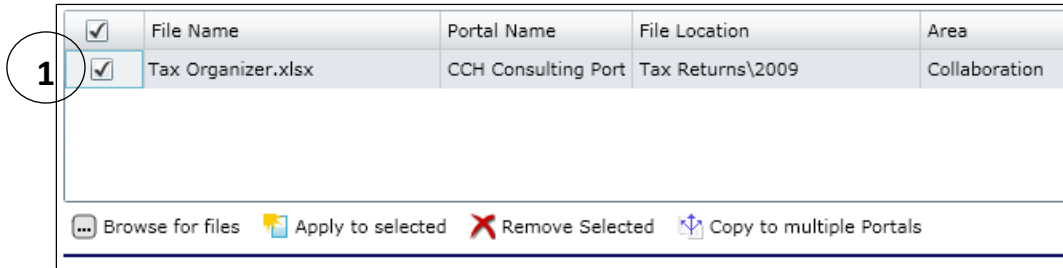


Figure 10 – Select Copy to Multiple Portals

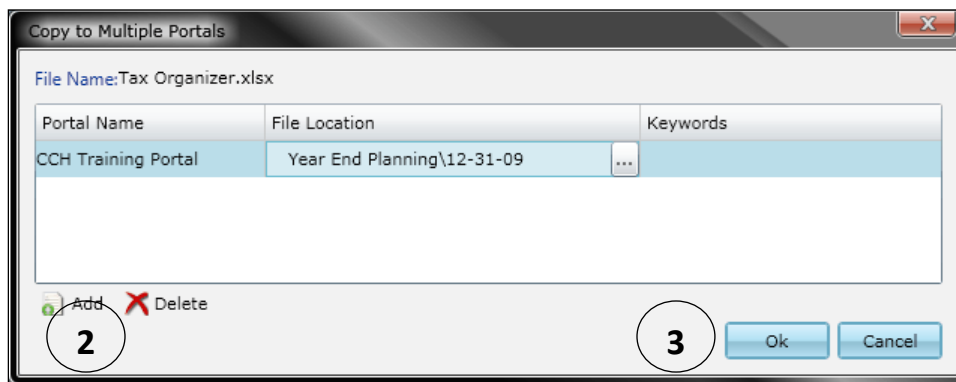


Figure 11- Select Portal(s)



### Steps to Copy Files to Multiple Portals

1. Check the box for the file that you wish to copy, then click **Copy to multiple Portals**.
2. Click **Add** to choose the Portal(s) the file will be copied to (from the Portal Name drop down menu).
3. Set file properties by choosing the File Location and optional Keywords and click **OK**.

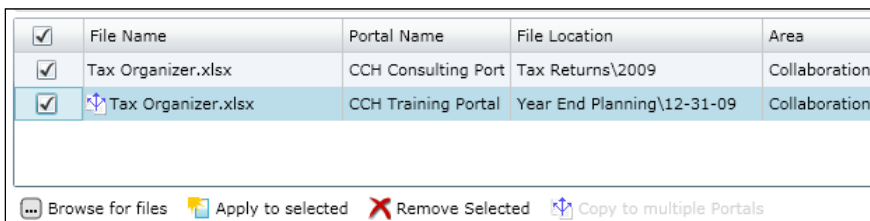


Figure 12 – File Upload Grid



The copied file is ready for Upload.



You may copy one file at a time. There is not a method to choose all Portals at once.



## File Upload Progress

File Upload Progress			
File Name	Size	Progress	Status
12-31-09 Form 1065 Client Copy.pdf	24 KB	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>	Completed

⏸ Pause All   ⏪ Resume All   🗑 Clear Completed   ✖ Remove selected file

Figure 13 – File Upload Progress



### File Upload Progress grid Key Features

- After selecting Upload, files will be viewable in the **File Upload Progress** grid. The grid will show the status of the Upload and when Completed.
- File upload may be paused, then Resumed at a later point in time. The file(s) will not remain paused and available to resume after logging out of Portal.
- You may browse to other areas of the portal while files are uploading, this will not cancel the upload. Select **Add Files** again to see the status of the file upload.



## Search for Files in Portal

### Files and Folders

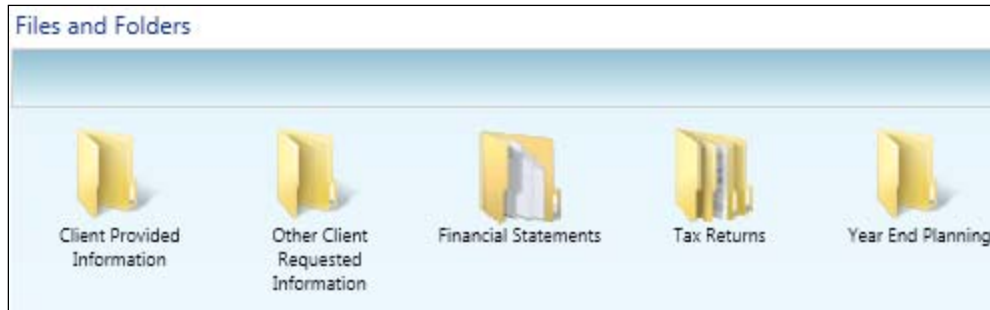


Figure 14 – Files and Folders



Use folders to organize and search for files within the Portal. Browsing to files in folders is similar to searching for files using Windows Explorer.

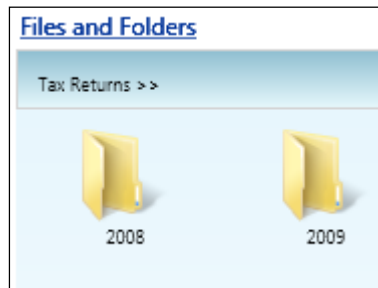


Figure 15 - Subfolders



A folder may contain subfolders, if needed, for further organization.



Figure 16 – Quick Search

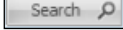


### Quick Search

- From the Portal Home Page, conduct a search by typing your search criteria in the Quick Search Box.
- Enter any portion of a portal name, folder name or file name in the search field and click **Search**.



## Search Options

Access more defined and advanced search options by clicking  on the Portal Home Page.

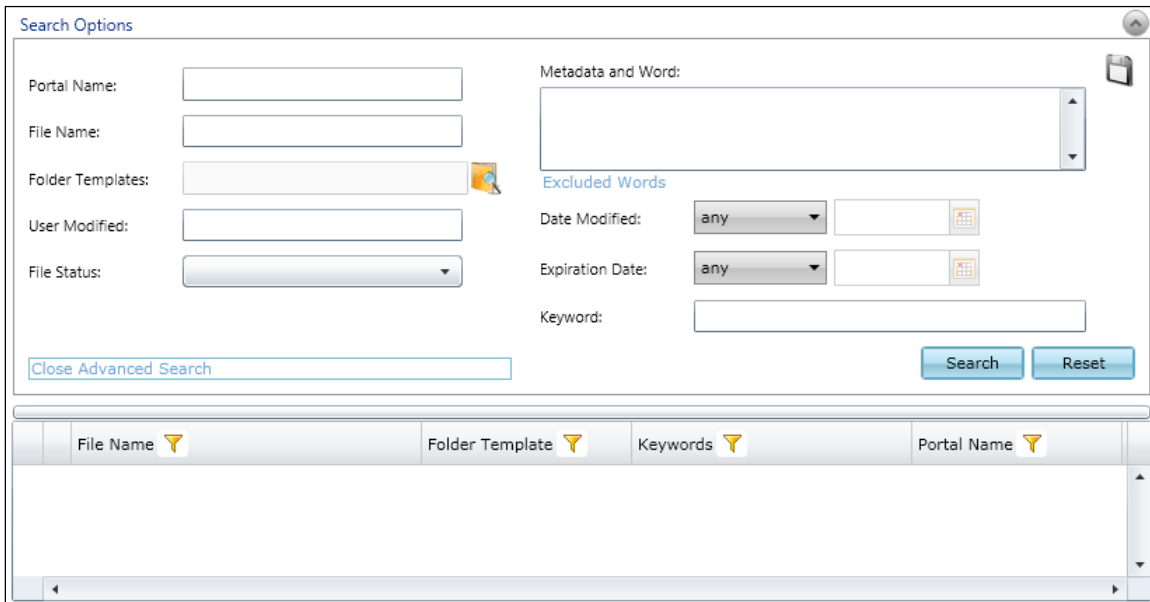


Figure 17 – Search Options



### Search Options Key Features

- Type any part of a portal name and the Portal Name field will auto-suggest Portals for you to select.
- The File Name field will search for files based on any string of characters or portion of the file name.
- The Folder Templates search will display the folder template associated with the portal that you previously selected in Portal Name field.
- To search for User Modified, enter the **entire** user ID (email address).
- Filter your entire search results list by; File Name, Folder Template, Keyword and Portal Name.



### Saved Searches



Use saved searches to easily access searches performed on a regular basis.

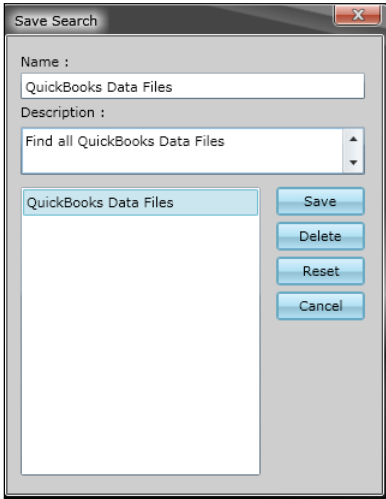


Figure 18 – Save Search



Enter a name and description for the search that you wish to save. The Search terms are filled in automatically. Click **Save**.



Figure 19 – Saved Searches



Access your **Saved searches** at the bottom of the Portals tab of the Navigation Panel on the Portal Home Page.

### Working With Files

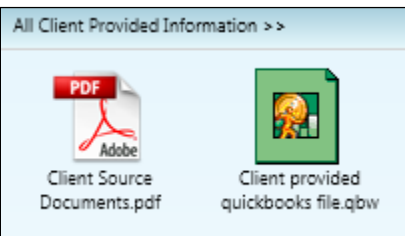


Figure 20 – Double-Click Files



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.

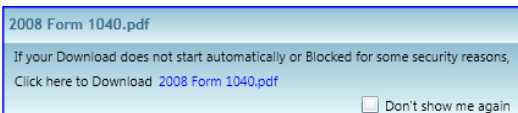


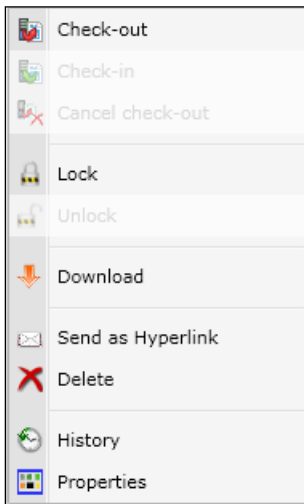
Figure 21 – Download File



Click the blue file name in the **File Download Box** (bottom right corner of the screen) to download the file. Click **Save** in the file download menu and select the location to save the file.



## The Right Click Menu



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

Figure 22 – Right Click Menu



### Right Click Menu Key Features

- |                          |                                                                                                                                                                                       |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Check-out</b>         | Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.                                                                 |
| <b>Check-in</b>          | Add a checked-out file back to Portal to reflect any changes made while checked-out.                                                                                                  |
| <b>Cancel check-out</b>  | Make it as if the Check-out never occurred. Any changes to the file will be lost.                                                                                                     |
| <b>Lock</b>              | Prevents Check-out, changes to and deletion of a file.                                                                                                                                |
| <b>Unlock</b>            | You may modify the file when unlocked. The user who locked the file may unlock the file.                                                                                              |
| <b>Download</b>          | Select to open or save the file; this is the same as double clicking on a file.                                                                                                       |
| <b>Send as Hyperlink</b> | 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. |
| <b>Delete</b>            | Send the file to the Recycle Bin.                                                                                                                                                     |
| <b>History</b>           | View a complete history of each operation performed on a file.                                                                                                                        |
| <b>Properties</b>        | 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

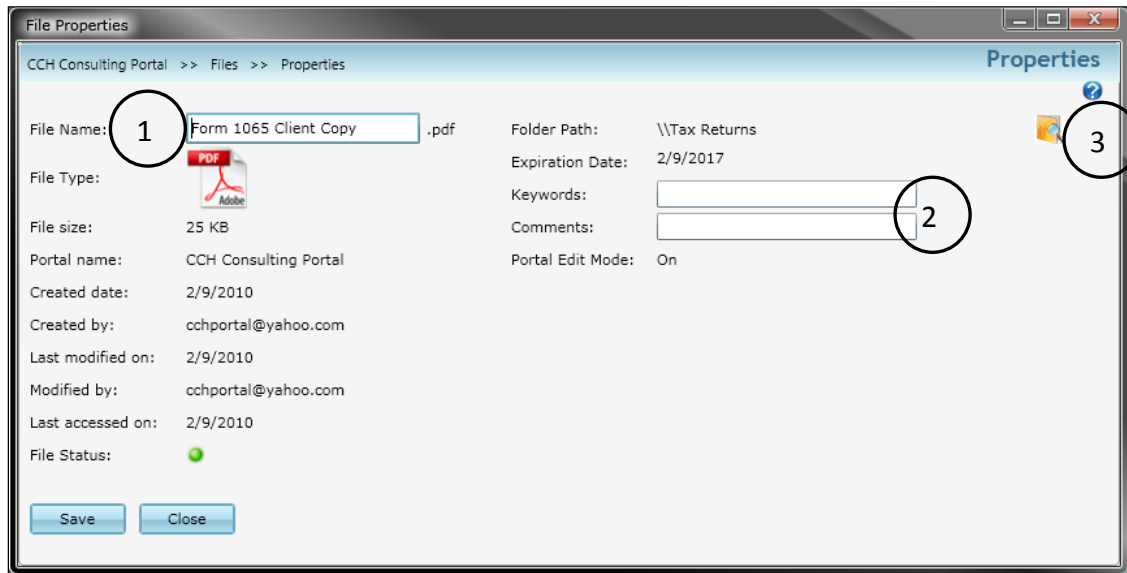


Figure 23 – File Properties



### File Properties Key Features

1. Rename a file
2. Add or modify Keywords and Comments
3. Change the folder location of a file
4. Click Save, and then Close to apply all changes



## 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>

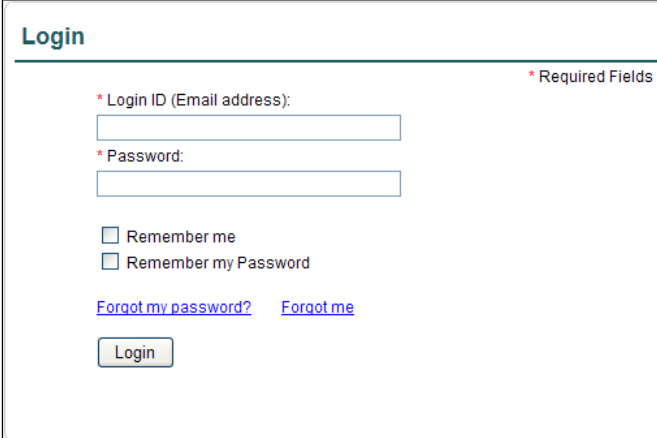
The screenshot shows a web form titled "Login". At the top right of the form area, there is a red asterisk and the text "\* Required Fields". Below this, there are two input fields: the first is labeled "\* Login ID (Email address):" and the second is labeled "\* Password:". Underneath the password field, there are two checkboxes: "Remember me" and "Remember my Password". Below the checkboxes, there are two blue hyperlinks: "Forgot my password?" and "Forgot me". At the bottom of the form, there is a "Login" button.

Figure 24 - SUI Login



Portal Home Page

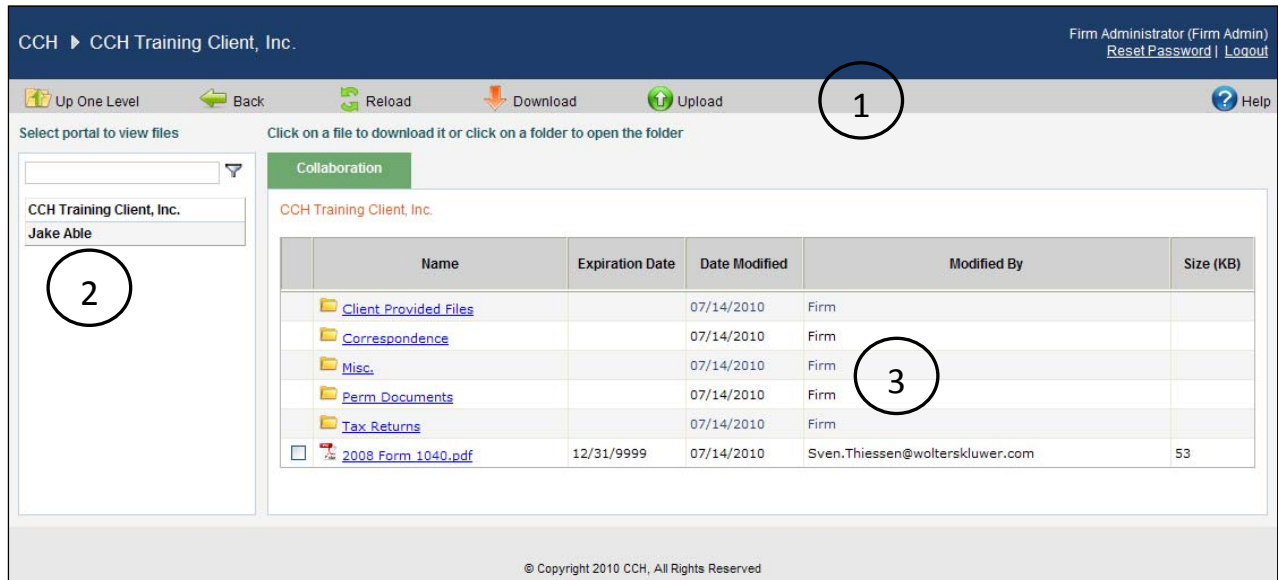


Figure 25 – Portal Home Page



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.

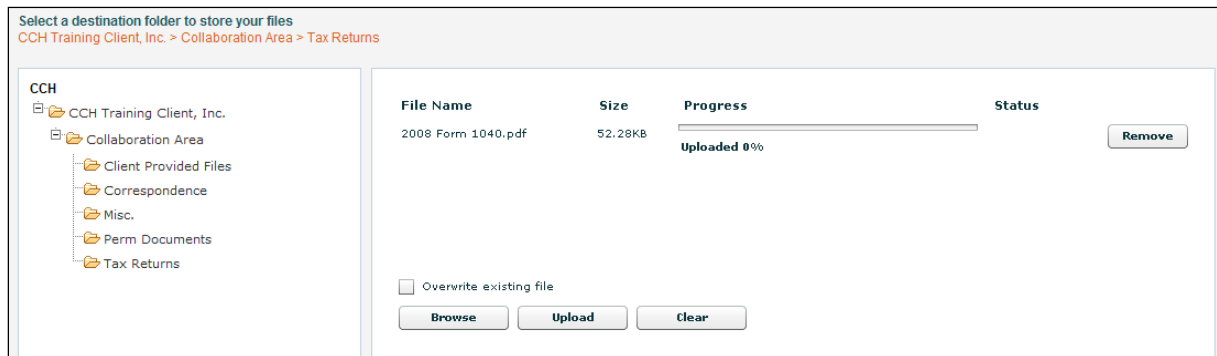



Figure 26 - Add Files to Portal



### 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.