

STEGMAN & COMPANY

ProSystem fx Portal Client User Guide

July 7, 2010





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

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About ProSystem fx Portal

Portal is a simple and easy to use Web application that facilitates secure file transfers and continued access between Stegman & Company 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 Stegman & Company's record retention and portal use policies.

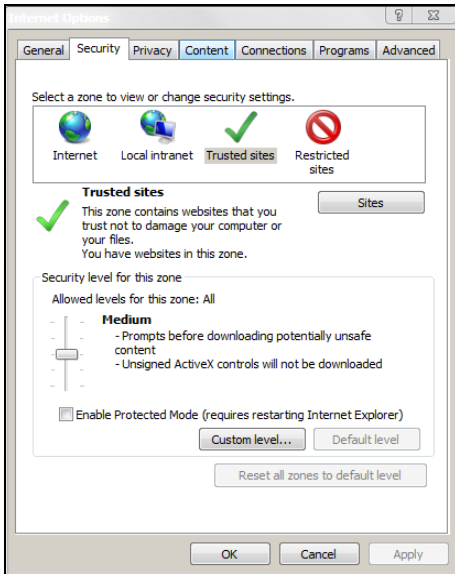
System Requirements

- 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>

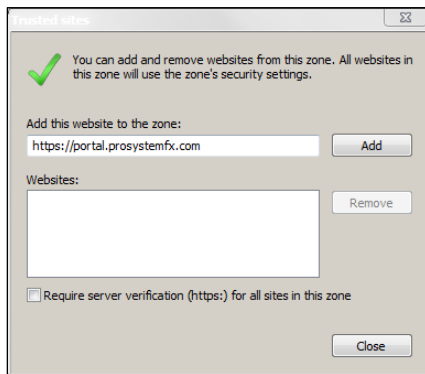
Internet Explorer



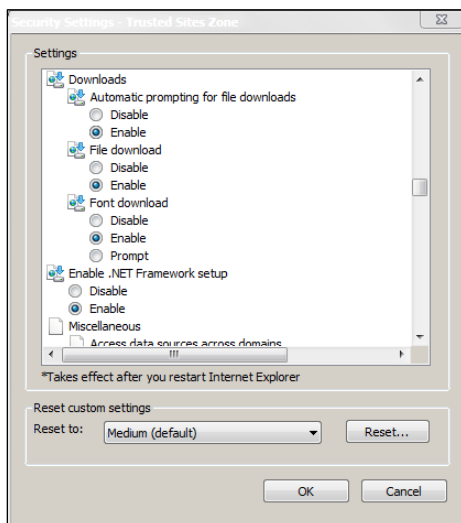
Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of ProSystem fx Portal, changing the following settings may allow for even easier use:



Internet Options



Trusted Sites



Custom Level



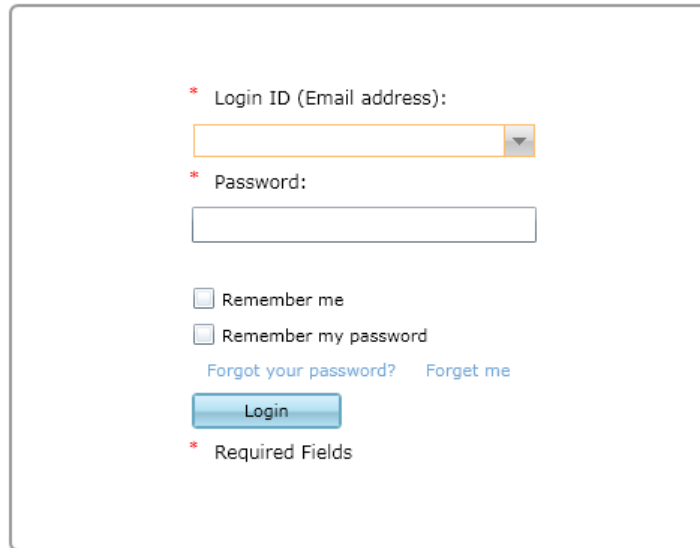
Internet Explorer Settings

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>



* Login ID (Email address):

* Password:

Remember me
 Remember my password

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

Login

* Required Fields

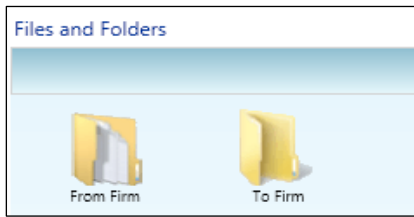
Portal Login



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 capital 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?](#)”
- When you receive the email from the portal with your temporary password, you may **not** copy and paste the password from the email to the log-in screen. This will count as an incorrect password attempt.
- Three incorrect log-in attempts will result in a 20 minute time out.

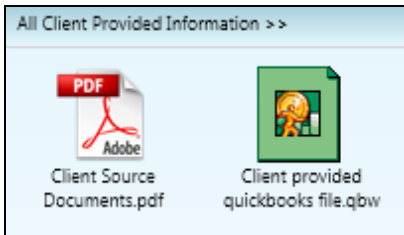
Download files from Portal



Files and Folders



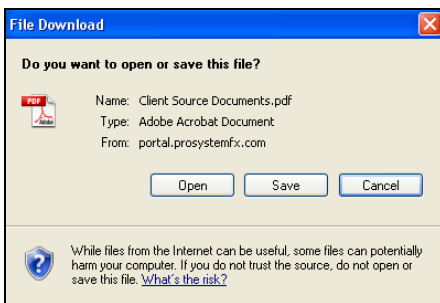
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



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

1 Portal: CCH Training Client

2 Select File Location: CCH Training Client
From Firm
To Firm

3 Browse for Files Apply to Selected Remove Selected File Copy to Multiple Portals

File Name	Portal Name	File Location	Area	Keywords
12-31-09 Form 1065 Client Copy	CCH Consulting and	From Firm	Collaboration	

4 Upload Cancel

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



You may also add ZIP files to Portal. A ZIP file contains one or more files that have been compressed to a reduced file size. ZIP files typically contain the file extension “.zip” or “.ZIP”. Compressing files often makes sending multiple files through email easier, and decreases the size of the attachment. To zip a file, perform the following:

1. Create a file folder with the contents you wish to zip
2. Right-click the folder, and choose Send to > Compressed (zipped) folder
3. Windows will then proceed to compress the file

You may then upload the ZIP file to Portal by following the same steps noted above.

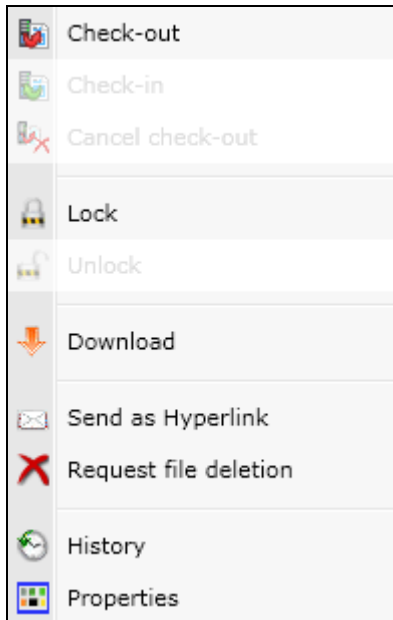
The Right Click Menu



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	Download	View or save file (same as double-clicking on file name).
Send as Hyperlink	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	Request file deletion	Requests file deletion by the firm.
History	History	View each action performed to the file and the user who performed the action.
Properties	Properties	Rename or change the folder location for a file.

General Notes



File Expiration Dates

All files uploaded to Portal have a 15 day expiration date. Please be conscientious of such when you get a notification about a file being uploaded to Portal.