Portal User Guide

May 2012

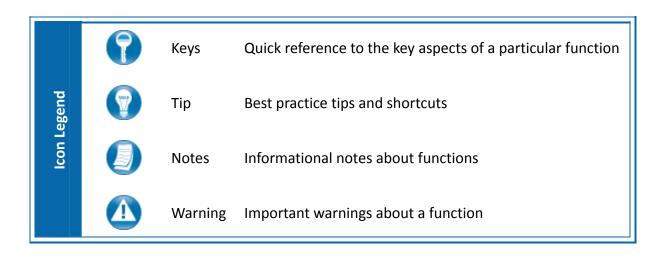|			
Icon Legend		Keys	Quick reference to the key aspects of a particular function
		Tip	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Warning	Important warnings about a function

About ProSystem *fx* Portal

Portal is a simple and easy to use web application that facilitates secure file transfer between RCM and our clients. For our clients, Portal is a web-based interface that only requires the installation of Microsoft Silverlight for use. If you need assistance with any of the portal options, including setting up additional users, please do not hesitate to contact our office.

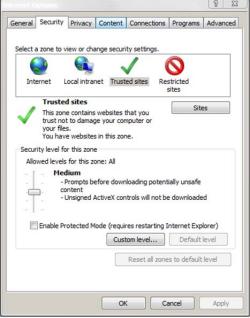Your Portal User ID and login information will be provided via email.

System Considerations

- You may access the Portal by browsing to https://portal.prosystemfx.com/portal.

- Portal relies on the Microsoft Silverlight 4 platform and you may be prompted to install Silverlight from Microsoft's website the first time you login. The install is completely safe and typically takes less than a minute with 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, and are unable to download Silverlight, browse to the following link to verify your Mac has an Intel processor. http://support.apple.com/kb/HT1531

- If you verify your Mac does not have an Intel processor, or if you need to access Portal on an iPad, other tablet computer, or smartphone you may login to Portal through the Simple User Interface, which is a Non-Silverlight login to Portal.

- Login to the Simply User Interface browsing to https://portal.prosystemfx.com/sui.
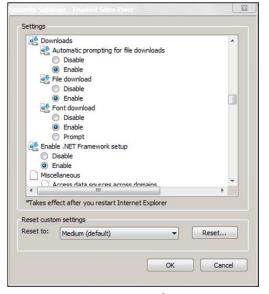
Internet Explorer

The following settings are not applicable to Internet Explorer version 9. If you are using Internet Explorer version 7 or 8 the following settings are optional, but will make using Portal easier.

Internet Options

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.

Trusted Sites

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

Custom Level

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.
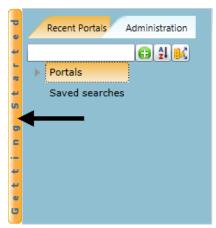

Portal Login

Login Tips

- Refer to the emails received from the firm for login ID and temporary password.
- Your Login ID (email address) is not case sensitive; the temporary password is case sensitive.
- For security reasons, you are required to change your password the first time you login.
- Your new password may be from 8 to 32 characters, must contain at least one upper case letter, one number, one special character (e.g. !, @, #, etc.) and is case sensitive.
- Your password may be reset at any time by clicking "**Forgot your password?**" on the Portal login page.
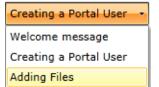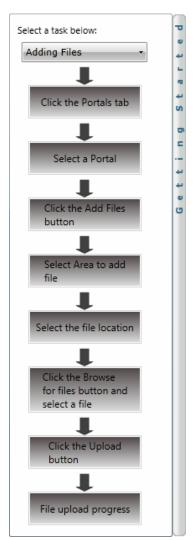
Getting Started

Getting Started Ribbon

You will see a brief "Welcome to the Portal!" when you login for the first time. Clicking continue directs you to the **Getting Started** menu. You may click the Getting Started menu ribbon on the left side of the screen to expand and view this menu at any time.

Menu Selection

Click the black arrow to view Getting Started menu options. **Creating a Portal User** is only visible to the Portal Admin user. The **Welcome Message** and **Adding Files** are visible to everyone.
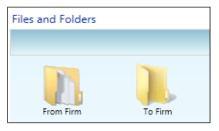

Adding Files

Getting Started Menu Key Features

- This is an interactive help feature, when you click on a button the place in Portal that you need to click in order to accomplish the task will highlight or begin to flash on-screen.
- Perform the suggested (flashing or highlighted) steps in sequence to easily add a file to Portal.

Downloading Files

Files and Folders

Folders are used to organize files on your portal. Double-click on a folder to view your files.
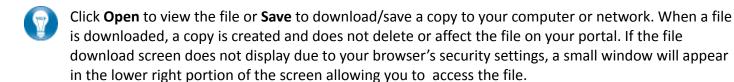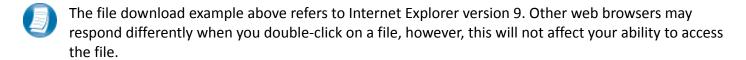

Your Files

A simple way to **View** or **Save** a file is to double-click on the file, which gives you the **File Download prompt,** as displayed below .
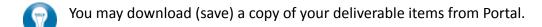

File Download Prompt (Internet Explorer 9)

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 above refers to Internet Explorer version 9. Other web browsers may respond differently when you double-click on a file, however, this will not affect your ability to access the file.

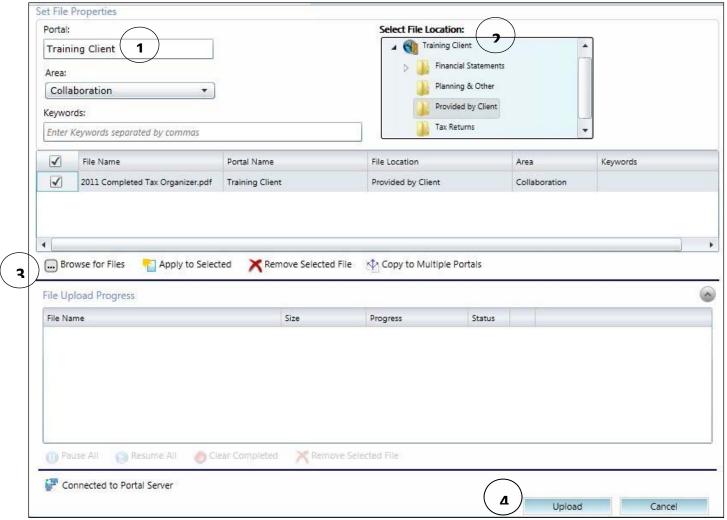You may download (save) a copy of your deliverable items from Portal.

Adding Files to Portal

Add files to the portal for the firm to view by clicking **[+ Add Files]** on the Portal Home Page to view the **Add files** window.

Add Files Screen

Steps to Add Files to Portal

1. If not selected, choose the Portal the file(s) will be uploaded to by typing any portion of the portal name (for our clients with multiple portals).

2. Select the **File Location** (destination folder in Portal).

3. Click **Browse for files** and browse to upload files on your computer or in your network folders.

4. Verify the properties applied and click **Upload** to add the file(s) to the portal.

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) we have has created for you, you can login and begin to exchange files with us 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, including grant and control portal access to others. The portal admin user will be the only user that exists when the portal is created.

Portal Users

A portal user is created and granted portal access by the portal admin. 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 confidential in 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 us before you could provide it to the bank, and vice versa. As the portal admin, you may create a portal user allowing your banker access to files and the ability to add files as requested; considerably reducing the time needed 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 our office, the portal admin and any 3rd party portal users initially.

If we have 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 by the portal admin user.

Managing Your Portal

The portal admin may easily grant portal access to others by creating additional portal users.

There are 2 steps to create portal users.

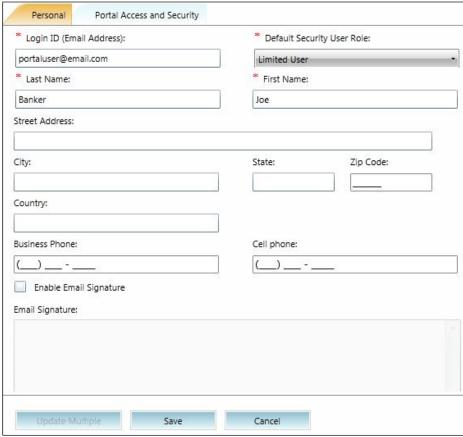1. Assign personal information
2. Assign portal access and security

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 Users

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 dropdown menu
   - **Administrator –**Grants all rights of Portal
   - **Standard User** -Denies the ability to overwrite files, all other rights are granted
   - **Limited User** –Grants all rights except; overwrite files, lock 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
   - **Upload Only User** – Only the ability to add files is granted
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 window
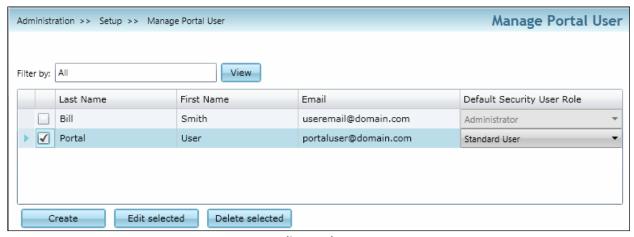
Portal Access and Security

Assign Portal Access and Security

5. All portals that the portal admin has access to will be 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 with login information will be sent to the 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.

Edit Portal User

Click **Manage Portal Users** to **edit** or **delete** a portal user. If all access to 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.

Securing a Folder

 Setting Up Folder Level Permissions

1. Right-click on the folder you wish to secure.
2. Select **Secure Folder** to view the portal users.
3. Choose portal users that will **continue** to have rights to the selected folder by clicking the box to the left of the user's last name. Leave the box **unchecked** for those you **do not** wish to have access to the folder.

	Last Name	First Name	Email
✓	Firm	Administrator	Nate.Brown@wolterskluwer.com
☐	Nate	Brown	irish.nate.1979@gmail.com
☐	Mary	Brown	mbrown.portal@gmail.com

Applying Folder Level Permissions to Portal Users

4. After selecting the portal users that will have access to the folder, click **Save.**
5. A popup window will display confirming the selected folder has been secured.
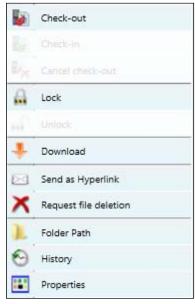
 To modify folder level permissions, right-click on a secured folder and select **Remove Folder Security**.

 Secured folders are easily identifiable as a lock icon is visible with the folders on the Portal Home Page. Secured folders are invisible to restricted users.

The Right Click Menu

Right-Click Menu

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

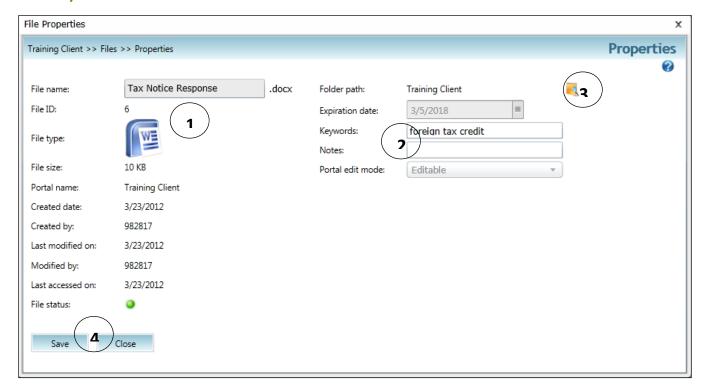|	**Right Click Menu Key Features**
Check-out	Check-out the file to edit files the firm has uploaded in edit mode.
Check-in	Check-in an edited file so the firm may view your updates.
Cancel check-out	Make it as if the Check-out never occurred.
Lock	Prevents check-out, changes to and deletion of a file.
Unlock	You may modify the file when unlocked. The user who locked the file may unlock the file.
Download	Select to view 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	Notify RCM that you would like this file to be deleted.
Folder Path	Move the file to another folder.
History	View a complete history of each operation performed on the file.
Properties	View the file's properties.

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

File Properties Key Features

1. The file name, type, size, and other static file properties are displayed here.
2. Add or modify the file's keywords and notes.
3. Change the folder the file is located in.
4. Click save, and then close to apply your changes.
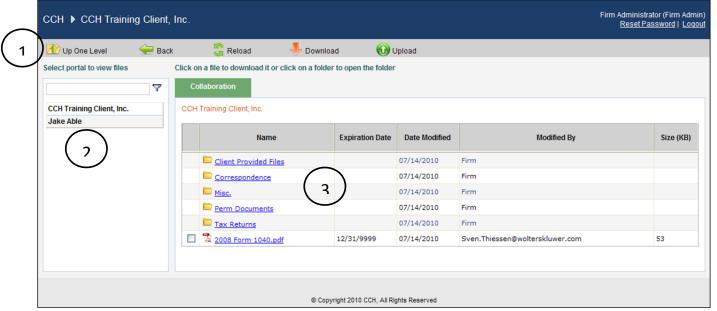
Simplified User Interface

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

SUI Login

Portal Home Page

Portal Home Page

Home Page Key Features

1	**Menu Bar**	Used to navigate through Portal.
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 to download 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 prompt** appears enabling the file to be saved or viewed.

Add Files to Portal

Click **Upload** in the menu bar to begin the process of adding files to the portal.

Add Files to Portal

Steps to add files to Portal

1. In the folder selection pane, select the destination folder in Portal.
2. Click **Browse** and select file(s) to upload from your computer or network.
3. Verify the file location and click **Upload** to add the file(s) to Portal.