

BRESLOW STARLING

# ProSystem fx Portal Client User Guide

For Clients of Breslow Starling

**Last Updated: 6/18/2013**

## 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 web application used for secure file transfers and continued access between FirmName and our clients. For a client, 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 FirmName's record retention and portal use policies.

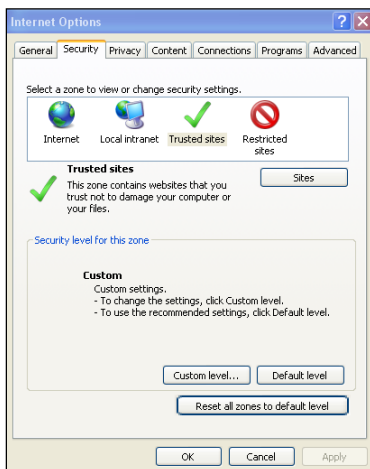
## System Requirements

- Portal is built on a Microsoft Silverlight platform and a user may be prompted to install Silverlight from Microsoft's website. The installation typically takes less than one minute to complete and is completely safe.
- 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>

## Internet Explorer



Internet Explorer users are required to add the portal URL to Trusted Sites.

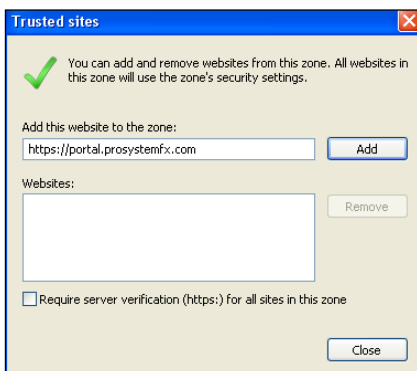


Internet Options



### Internet Explorer Settings

1. Open Internet Explorer and browse to <http://www.breslowstarling.com/client-portal.php>
2. In Internet Explorer, select Tools, Internet Options, and Security, then click Trusted Sites. See #3 below for the final step.



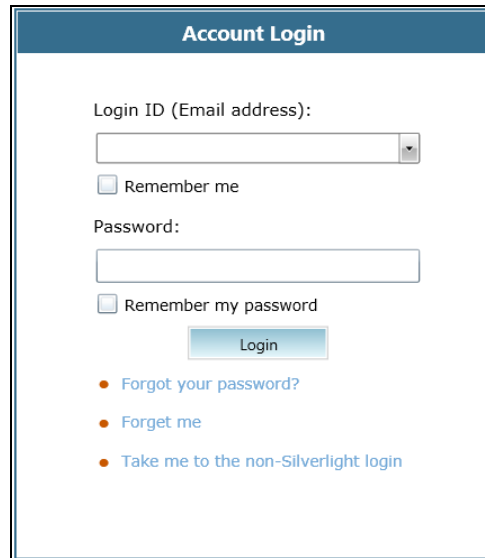
Trusted Sites

3. Click Add to move the Portal URL to the trusted sites zone, then click close.

## Quick Start Guide

### Portal Login

Launch your internet browser and browse to <http://www.breslowstarling.com/client-portal.php>



The screenshot shows a web form titled "Account Login". It contains the following elements:

- A label "Login ID (Email address):" above a text input field with a dropdown arrow on the right.
- A checkbox labeled "Remember me" below the Login ID field.
- A label "Password:" above a text input field.
- A checkbox labeled "Remember my password" below the Password field.
- A blue "Login" button centered below the Password field.
- Three links below the button: "Forgot your password?", "Forget me", and "Take me to the non-Silverlight login".

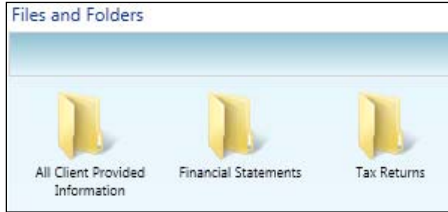
Portal Login



### 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.
- You will be required to change your password upon logging in for the first time and answer at least one security question. Your security questions can help you access your portal if you ever forget your password.
- Your new password; which 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?](#)"
- If you cannot, or prefer not to, install Silverlight on your machine, click "[Take me to the non-Silverlight login](#)" to use our lightweight version of the Portal that does not require Silverlight. Advanced features are not available from the non-Silverlight version of Portal.

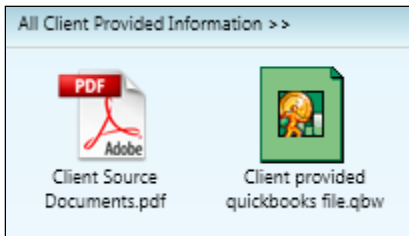
## Download files from Portal



**Files and Folders**



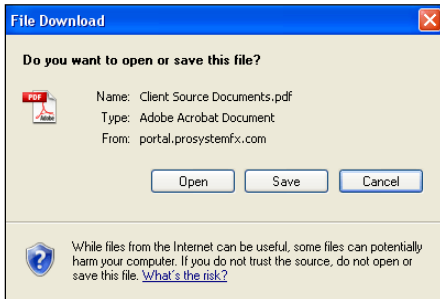
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



**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 screen, displayed below.



**File Download**



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 affect the file on your portal.



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



The screenshot displays the 'Smith Properties, LLC' portal. On the left, the 'Recent Portals' sidebar shows 'Smith Properties, LLC' selected, marked with a circled '1'. The main content area has a top bar with 'Announcements' and 'Portal Info' (showing 3 users and 0 files). Below is the 'Files and Folders' section, which has a toolbar with 'Add Files' (circled '3'), 'Upload Files' (circled '4'), and 'View'. The file browser shows a tree view with 'Smith Properties, LLC' (circled '2') containing 'Tax' and 'Accounting' folders. A PDF file '2012 Tax Documents.pdf' is shown in the main pane. At the bottom, it says 'Connected to Portal Server'.

### Add Files



### Steps to Add Files to Portal

On the Portal Home page:

1. Select a portal (only for those users that have access to multiple portals)
2. Select the file location (folder)
3. Click  to select file(s) via Windows Explorer or Drag and Drop files from your computer to the Files and Folders section
4. Click  to upload the file(s) to Portal

## Advanced Features

- This section is intended to provide further 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.

### *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 access by the Portal Admin. Portal Users should only be created when Portal access is required by more than one person.

### *About User Roles*



Being the Portal Admin means you are the primary user for the portal(s) that have been created for you or your organization.

### *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 having access to Portal; options to exchange information included email, fax, CD-ROM or hard copy paper, and in many cases you had to request the document from the firm before you could provide it to the bank. As the Portal Admin, you may create a Portal User allowing your banker access to requested documents and the ability to add files at the request of you and the firm; considerably reducing the time and resources spent to exchange information. The security level of Portal far exceeds email, which is most often the primary medium of exchanging electronic files.
- If the firm has created more than one portal for you, you will be able to control which portal(s) your banker or other third party may view.
- Your firm's portal solution, may or may not, provide you with the ability to secure folders. If available, this feature allows the Portal Admin to control a Portal User's access to one or more folders within a portal.

## Managing Portal

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



There are 3 steps to create Portal Users.

1. Create the Portal User
2. Grant the Portal User access to one or more portals
3. Choose the Portal User's File Management Role for each portal they can access

## About File Management Roles



There are 5 File Management Roles that can be assigned.

1. Administrator – Allows Portal Users to perform all file operations.
2. Standard User – Allows Portal Users to perform the most common file operations.
3. Limited User – Allows Portal Users to perform a limited number of file operations.
4. Read-only User – Allows Portal Users to download files and review related information.
5. Upload-only User – Allows Portal Users to upload files and review related information.



### Recommendations

- It is our recommendation that administration rights NOT be granted to Portal Users.



### Administration tab defined

- Portal User Management - Create, modify and delete Portal Users.

## Create Portal Users

Administration >> Setup >> Manage Portal User Manage Portal User

Search portals:

|                                     | Last Name     | First Name    | Email                 | Default Security User Role |
|-------------------------------------|---------------|---------------|-----------------------|----------------------------|
| <input checked="" type="checkbox"/> | Doe           | John          | johndoe@email.com     | Administrator              |
| <input type="checkbox"/>            | Test Portal A | Test Portal A | TestPortalA@gmail.com | Limited User               |

### Manage Portal Users



From the Administration tab; click “**Manage Portal Users**”, then click “**Create**”.



Personal Portal Access and Security

\* Login ID (Email Address):

\* Last Name:

\* First Name:

\* Default Security User Role:

Street Address:

City:  State or Province:  Zip or Postal Code:

Country:

Business Phone:  Cell phone:

Enable Email Signature

Email Signature:

**Create Portal User**



On the Personal tab, enter the Login ID (email address), last and first name of the user; these are the only items that are required. The next step is to click the Portal Access and Security tab.

Administration >> Setup >> Manage Portal User >> Create Portal User Create Portal User

User Information - New User

Personal Portal Access and Security

| <input type="checkbox"/> | Portal Name   | Grant Access <sup>1</sup>           | Access Expiration | File Management Role <sup>2</sup>  | Client Area              |
|--------------------------|---------------|-------------------------------------|-------------------|--|--------------------------|
| <input type="checkbox"/> | John Doe      | <input checked="" type="checkbox"/> | Enter Date        | Standard User  | <input type="checkbox"/> |
| <input type="checkbox"/> | Test Portal A | <input type="checkbox"/>            | Enter Date        | Administrator<br>Standard User<br>Limited User<br>Read-only User<br>Upload Only User | <input type="checkbox"/> |

Update Multiple Save <sup>3</sup> Cancel

**Create Portal User**



### Assign a user to a Portal

1. All portals will be displayed, check the Grant Access box to allow access to a Portal.
2. Assign a File Management Role for Portal Users to the selected Portal.
3. Select **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 FirmName.

Administration >> Setup >> Manage Portal User Manage Portal User

Search portals:

|                                     | Last Name     | First Name    | Email                 | Default Security User Role |
|-------------------------------------|---------------|---------------|-----------------------|----------------------------|
| <input checked="" type="checkbox"/> | Doe           | John          | johndoe@email.com     | Administrator              |
| <input type="checkbox"/>            | Test Portal A | Test Portal A | TestPortalA@gmail.com | Administrator              |

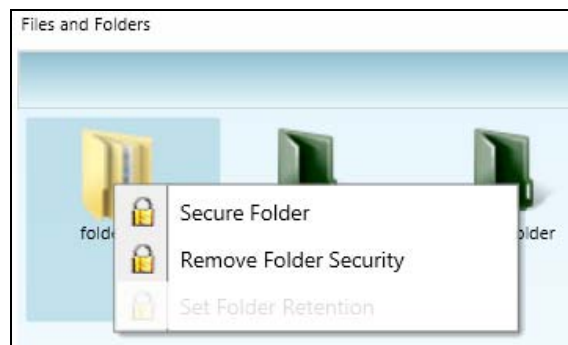
**Edit Portal User**



Select 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 Security

- By default, all Portal Users have access to a folder. Folder Security allows you to secure folders by controlling which Portal Users can access them.



**Folder Menu**



Right-click on any folder to access the Folder Menu for that folder. To secure a folder, select Secure Folder from the folder menu and select only the users that should have access to the folder. Folder security can be removed or edited at any time.

## The Local File Menu

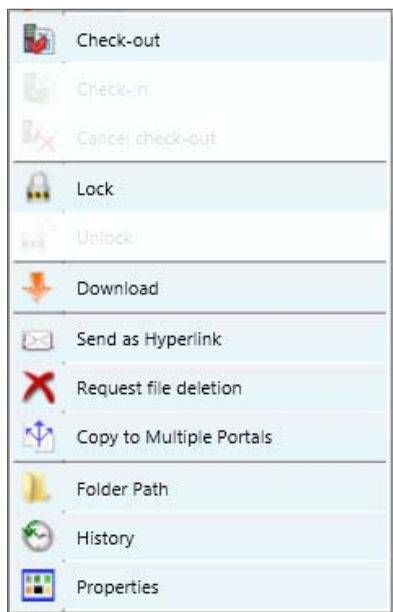
- The Local File Menu contains several options for modifying and working with files.



Right-click on any file to access the Local File Menu for that file.



### Local File Menu Key Features



Right-Click Menu

|                          |   |
|--------------------------|---|
| 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                 | Add the previously checked-out file back to Portal to reflect any changes.  |
| Cancel Check-out         | Check-in a previously checked-out file as if the Check-out never occurred.  |
| Lock\Unlock              | Prevent file from being checked-out or deleted.   |
| Download                 | View or save file (same as double-click on file name).  |
| 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    | Requests file deletion by the firm.   |
| Copy to Multiple Portals | Copies a file to other portals that the Portal User has access to.  |
| Folder Path              | Move file to a new folder.  |
| History                  | View each action performed to the file and the user who performed the action.   |
| Properties               | Rename or change the folder location for a file.  |

## Quick Reference Guide

### *Portal Login*

- Launch your internet browser and browse to <http://www.breslowstarling.com/client-portal.php>
- Enter your Login ID and your temporary password. These can be found in the email you received from the firm.
- You will be required to change your password upon logging in for the first time and answer at least one security question.

### *Add Files to Portal*

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the uploaded files should be stored.
- Click the Add Files button to select files or drag and drop files from your computer to the selected folder location.
- Click the Upload Files button.

### *Download Files from Portal*

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the files you want to download are located.
- Right-click the file and select Download.