



Portal Admin Login



Every portal will have one Portal Admin user. This Portal Admin may be either the client or a staff member within the firm. The same Portal Admin can administer multiple portals.



Portal Admin Login Tips & Tricks:

- The login credentials for the Portal Admin will be sent to the email address provided during the portal setup process.
- Logging into the Portal always takes place at the same URL: <https://portal.prosystemfx.com/portal/>.
- The Portal Admin has the authority to create other portal users, assign permissions and modify the portal configuration.

Portal User Security Groups

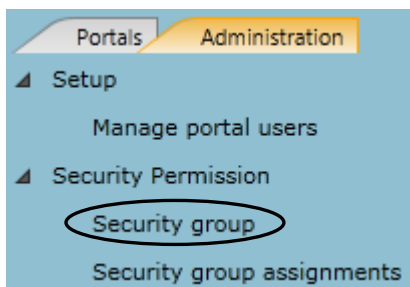


Figure 5 - Portal User Security Groups



Portal User Security Groups – Tips & Tricks:

- One security group will exist initially called Full Rights.
- The Portal Admin will first need to create additional security groups for the Portal Users or modify the existing Full Rights group.



Steps to create a Portal User security group:

1. Select the **Administration** tab from the Navigation Panel
2. Click on **Security group**, under the **Security Permission** heading
3. Click **Create**
4. Give the security group a **Name**
5. Choose (from the drop-down menu) which Portals will include this security group
6. Provide an optional **Description** for this group
7. Dictate the rights (Grant, Undefined, Never allow) for each available module
8. Click **Save**



Creating Portal Users

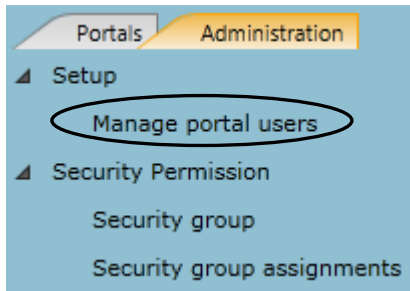


Figure 6 - Manage Portal Users



The Portal Admin can begin to create additional Portal Users after first addressing the security groups.



Each client/third party requiring access to the portal will need their own Portal User account.



Steps to create a Portal User:

1. Select the **Administration** tab from the Navigation Panel
2. Click on **Manage portal users**, under the **Setup** heading
3. Click **Create**
4. Fill in **Login ID** (the email address of the portal user)
5. Fill in **Last Name** and **First Name**
6. Click on the **Portal Access and Security** tab
7. Choose which portals this user can access
8. Choose the appropriate security group
9. Click **Save**
10. Repeat **Steps 3 – 9** to create additional Portal Users

Login ID (Email Address):	<input type="text"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>

Figure 7 - Required Portal User Fields



Portal User – Tips & Tricks:

- The fields not mentioned (to the left) are optional when creating Portal Users.
- The newly created Portal User will receive two emails: one with the URL and Login ID and one with the temporary password.

Editing Portal Users



Editing Portal Users is a simple process. Select the Portal User on the **Manage portal user** screen with the check mark. Make the appropriate selection – **Edit selected** or **Delete selected**.



Be sure to confirm your changes by clicking **Save** at the bottom of the Edit Portal User screen.





Adding Files to Portal

Firm >> Add Files
Add files

Set File Properties

Portal:

Area:

Keywords:

Select File Location:

- ▲ CCH Training Client, Inc.
 - 📁 Client Provided Files
 - 📁 Firm Delivered Files

<input checked="" type="checkbox"/>	File Name	Portal Name	File Location	Area	Keywords
<input checked="" type="checkbox"/>	2008 Form 1040.pdf	CCH Training Client,	Firm Delivered Files	Collaboration	

Apply to selected
 Browse for files
 Remove Selected
 Copy to multiple Portals

File Upload Progress

File Name	Size	Progress	Status		

Pause All
 Resume All
 Clear Completed
 Remove selected file

Connected to Portal Server

Figure 16 - Adding Files to Portal



Steps to Add Files to Portal:

1. Set the **File Properties**
2. Select the folder location in which to save the file
3. **Browse** for the file(s) to upload
4. Verify that the information for each file being uploaded is correct
5. Click **Upload**



- Click **Copy to multiple Portals** to add a file to multiple portals at the same time.
- Change the name of a file by double clicking the file name within the file s selection grid






Searching for Files

Files and Folders



Figure 17 - Files and Folders



- Double click a folder to access the files within it.
- Functionality is similar to Windows Explorer
- Click  Toggle View to change the view of items displayed in the Files and Folders

Quick Search

From the Portal Home Page, conduct a Quick Search by typing your search criteria in the Quick Search box.

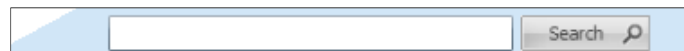


Figure 18 - Quick Search

You can search for a file based on portal name, file name, folder template, and folder name.

Search Options

Access specific and advanced search options by clicking on the Search button on the Portal Home Page (see Figure 18 above).

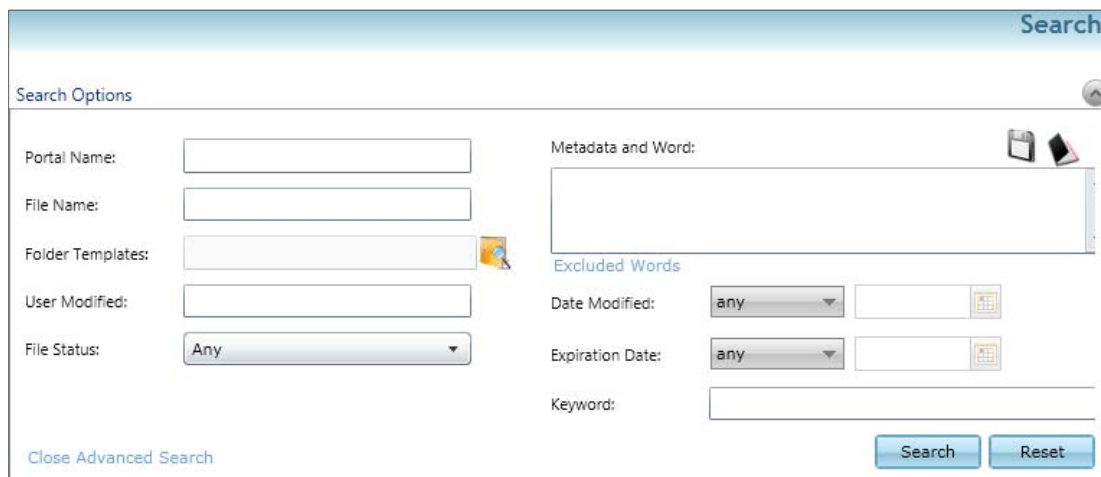


Figure 19 - Search Options