



BST's Portal Client User Guide

About BST's Client Portal





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

System Requirements

- Portal relies on the Microsoft Silverlight 3 platform. 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 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>

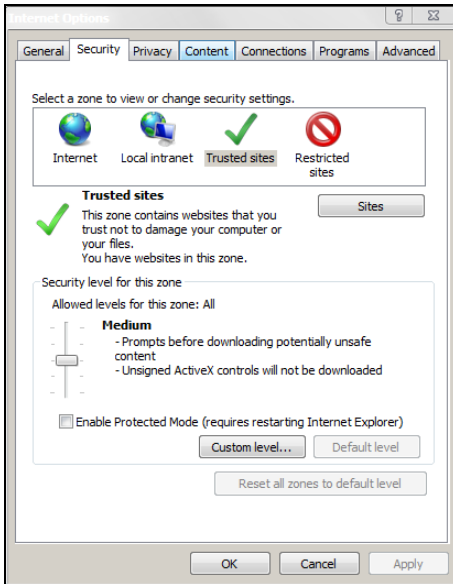
Icon Legend for this Guide

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

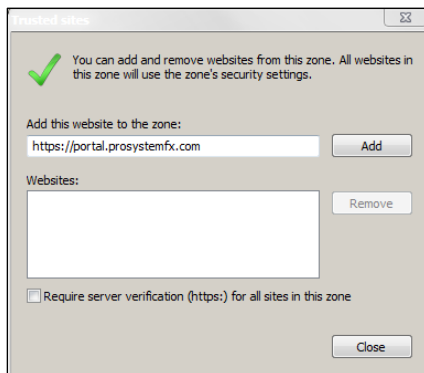
Internet Explorer



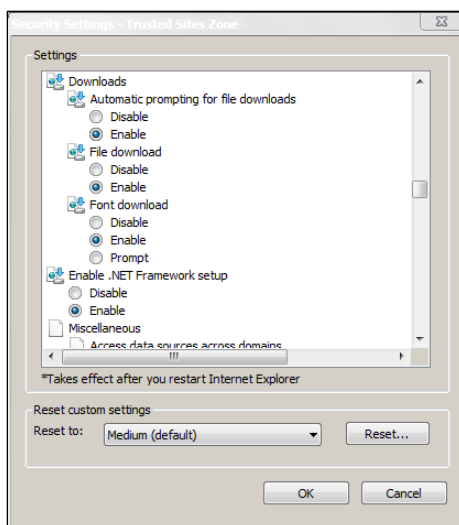
Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of BST's Portal, changing the following settings may allow for even easier use:



Internet Options



Trusted Sites



Custom Level



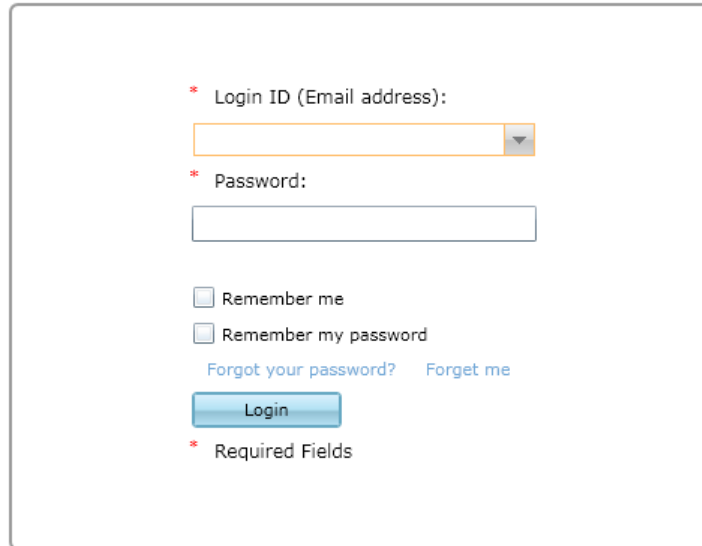
Internet Explorer Settings

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.
7. Click **OK** to save the changes.

Quick Start Guide

Portal Login

Launch your Web browser and browse to <https://portal.prosystemfx.com/portal>



The screenshot shows a login form with the following elements:

- A red asterisk followed by the text "Login ID (Email address):" above a text input field with a dropdown arrow on the right.
- A red asterisk followed by the text "Password:" above a text input field.
- Two checkboxes: "Remember me" and "Remember my password", both of which are unchecked.
- Two blue links: "Forgot your password?" and "Forget me".
- A blue "Login" button.
- A red asterisk followed by the text "Required Fields" at the bottom.

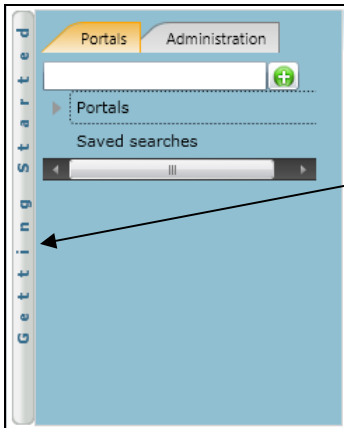
Portal Login



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 numeric character, one special character (e.g., !, @, #, etc.) and is case sensitive.
- Your password may be reset at anytime by clicking "[Forgot your password?](#)"

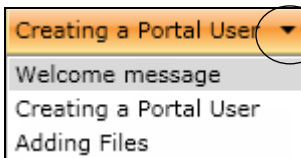
Getting Started



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.

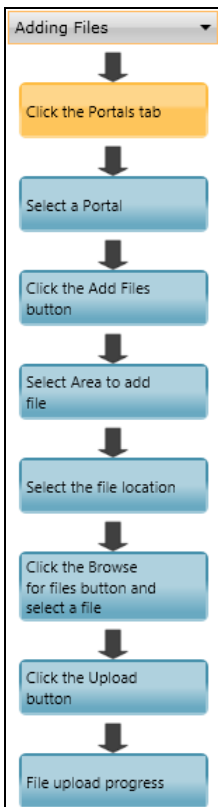


Menu Selection



Click the black arrow to view **Getting Started** menu options.

- **Creating a Portal User** will only be visible to Portal Admin users.
- **The Welcome Message and Adding Files** will be visible to all Users.



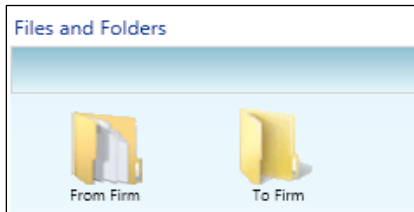
Adding Files



Getting Started Menu Key Features

- When clicking on the buttons, the respective feature in Portal will begin to flash in order to call attention to it.
- Perform the suggested (flashing) step, and then click on the next step to easily perform each step required for the selected task.
- This feature is not only for informative purposes, it may be used to add files to Portal for the firm to view (e.g., Returns, Financial Statements) that are added to Portal.

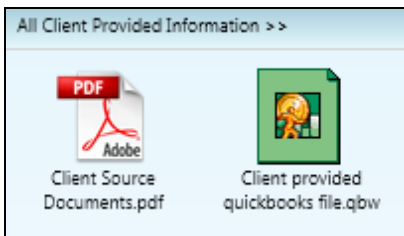
Viewing and Downloading Files from Portal



Files and Folders



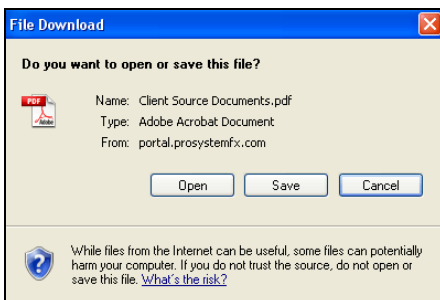
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



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 that you download (save) a copy of your deliverable items from Portal, as **most files will not remain there indefinitely**. BST can provide more detail regarding how long files will be accessible via Portal.

Adding Files to Portal

The screenshot shows the 'Add Files' interface with the following elements:

- 5**: Breadcrumb 'Firm >> Add Files' and 'Add files' button.
- 1**: 'Set File Properties' section with 'Portal: CCH Training Client', 'Area: Collaboration', and 'Keywords' field.
- 2**: 'Select File Location:' section with a tree view showing 'CCH Training Client' > 'From Firm' > 'To Firm'.
- 3**: Action bar with 'Browse for Files', 'Apply to Selected', 'Remove Selected File', and 'Copy to Multiple Portals'.
- 4**: 'File Upload Progress' table with columns: File Name, Size, Progress, Status.
- Bottom controls: 'Pause All', 'Resume All', 'Clear Completed', 'Remove selected file', 'Connected to Portal Server', and 'Upload/Cancel' buttons.

<input checked="" type="checkbox"/>	File Name	Portal Name	File Location	Area	Keywords
<input checked="" type="checkbox"/>	12-31-09 Form 1065 Client Copy	CCH Consulting and	From Firm	Collaboration	

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 (if you 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.











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

 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	Check-in	Add the checked-out file back to Portal to reflect any changes.
 Lock	Lock\Unlock	Prevent file from being checked-out or deleted.
 Unlock	Lock\Unlock	Prevent file from being checked-out or deleted.
 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.