





Portal Client User Guide

November 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 transfers and continued access between Hellam Varon 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 Hellam Varon's record retention and Portal use policies.

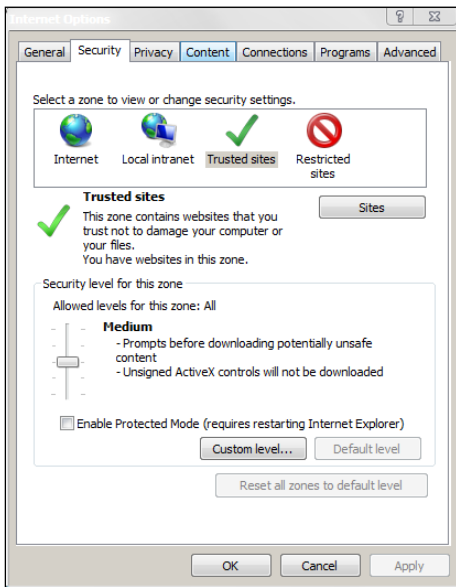
System Requirements

- 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:

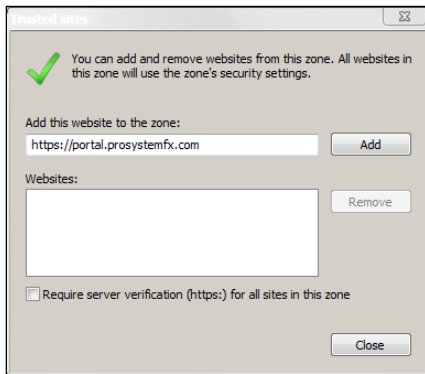


Internet Options

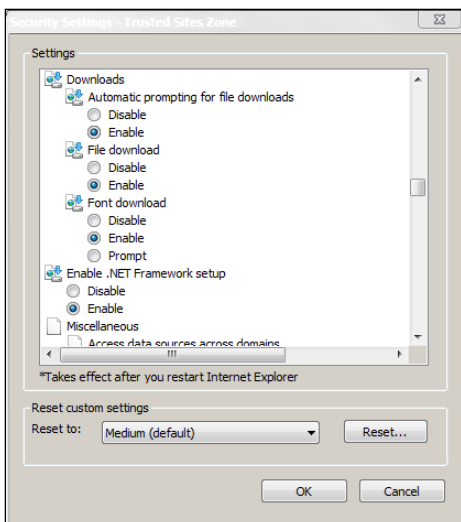


Internet Explorer Settings

1. Open Internet Explorer and browse to <https://portal.prosystemfx.com/portal> or go to our website: www.hellamvaron.com and click the "Client Portal" button towards the bottom of the page.
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.



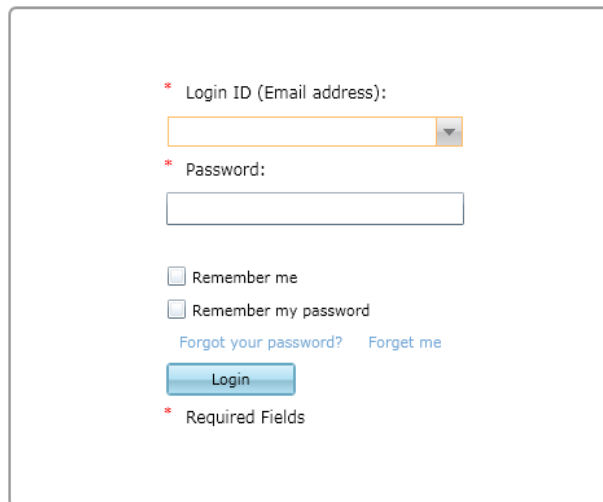
Trusted Sites



Custom Level

Portal Login

Launch your Web browser and browse to <https://portal.prosystemfx.com/portal> or go to our website www.hellamvaron.com and click the "Client Portal" button towards the bottom of the page.

A screenshot of a web login form. At the top, it says "* Login ID (Email address):" followed by a text input field with a dropdown arrow on the right. Below that is "* Password:" followed by a text input field. There are two checkboxes: "Remember me" and "Remember my password". Below the checkboxes are two links: "Forgot your password?" and "Forgot me". At the bottom is a blue "Login" button. At the very bottom, it says "* Required Fields".

Portal Login



Login Tips

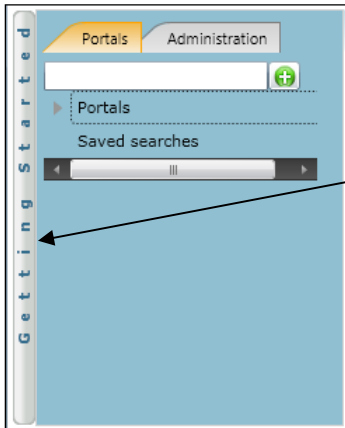
- Refer to the emails received from the firm for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- For security reasons, you are required to change your password upon logging in for the first time.
- Your new password may be from 8 to 32 characters, must contain at least one alpha character, one numeric character, one special character (e.g. !, @, #, etc.) and is case sensitive.
- Your password may be reset at anytime by clicking “[Forgot your password?](#)”
- For security reasons, you will be required to change your password every 180 days. The system will prompt you to make this change.

Hellam Varon's End User License Agreement



All Portal users will be prompted to an end user license agreement upon first login. Users will not be able to proceed to and use the Portal unless they agree to the terms of the end user license agreement. For convenience purposes, the EULA has been included at the end of this Portal User Guide.

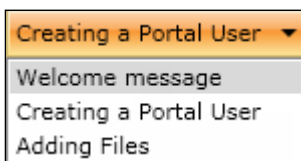
Getting Started



Getting Started Ribbon



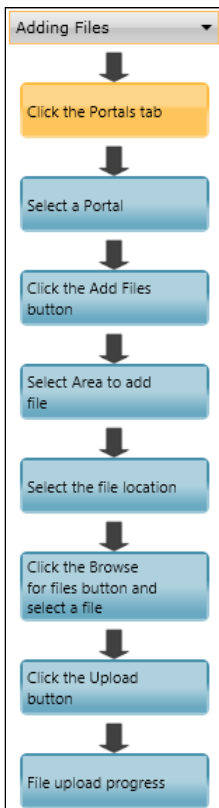
A short **“Welcome to the Portal!”** message will be presented to each user upon their initial login to Portal. The welcome message simply directs users to the expandable/collapsible **Getting Started** menu. Click the **Getting Started** ribbon on the left side of the screen to expand and view this menu.



Menu Selection



Click the black arrow to view **Getting Started** menu options. Creating a Portal User will only be visible Portal Admin users. **The Welcome Message and Adding Files will be visible to all Users.**



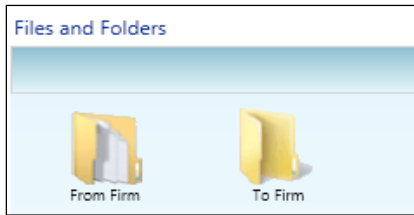
Adding Files



Getting Started menu Key Features

- When clicking on the buttons, the respective feature in Portal will begin to flash.
- Perform the suggested (flashing) step, and then click on the next step to easily perform each step required to add files to Portal.

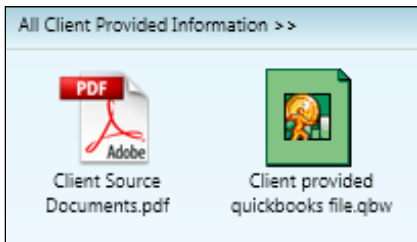
Download files from Portal



Files and Folders



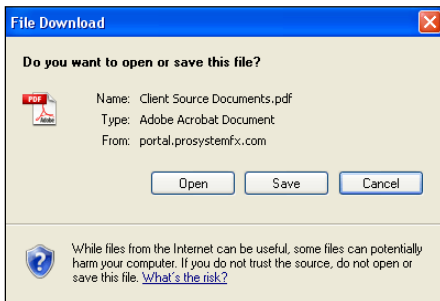
Folders are used to organize files on the Portal. Simply double-click on a folder to view your files.



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 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.



The File Download example displayed above refers to Internet Explorer. Other Web browsers may respond differently when you double-click on a file name, but 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. Generally, files will be accessible via Portal for three years.

Add Files to Portal

5

1

2

3

4

Firm >> Add Files Add files

Set File Properties

Portal:

Area:

Keywords:

Select File Location:

- CCH Training Client
 - From Firm
 - To Firm

<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	

File Upload Progress

File Name	Size	Progress	Status
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Connected to Portal Server

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 who have access to Portals for multiple entities)
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

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 not required for each portal.
- As the primary user for the Portal(s) the firm has created for you, you can login and begin to exchange files with the firm 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, 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 Portal access by the Portal Admin or a Firm Administrator at the Firm. 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 likely to be of a sensitive nature.

Example of Advanced Portal Use

- You may find situations in which it is practical to grant Portal access to a 3rd party. 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 the firm before you could provide it to the bank, and vice versa. As the Portal Admin, you may create a Portal User for a 3rd party allowing access to files and the ability to add files as requested; considerably reducing time and resources spent 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 the firm, Portal Admin and any 3rd party Portal Users.



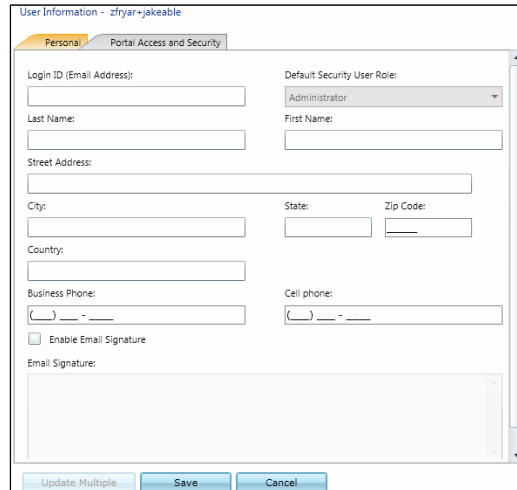
As circumstances change, Portal access should be updated or completely terminated. The Portal Admin user and the Firm's admin account may terminate Portal access.

Create Portal Users

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



From the Administration tab, click Manage Portal Users, then click  at the bottom of the page.

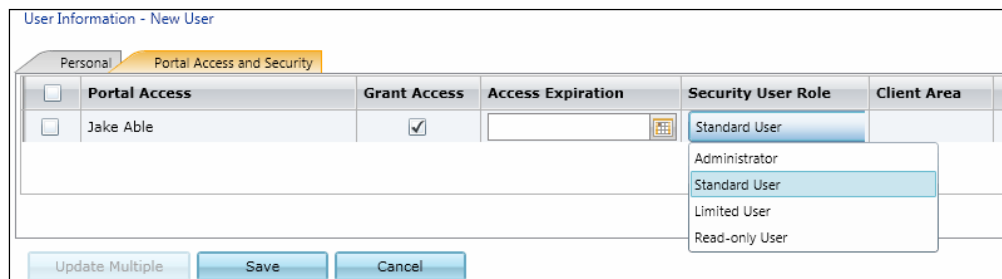


Create Portal User



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 drop down menu
 - **Administrator** - Grants all rights of Portal
 - **Standard User** - Denies the ability to overwrite existing files, all other rights are granted
 - **Limited User** - Grants all rights except; overwrite existing files, lock/unlock files, and append to an existing PDF file
 - **Read-Only User** - Allows users to search for and view the file, its history and properties
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 screen



<input type="checkbox"/>	Portal Access	Grant Access	Access Expiration	Security User Role	Client Area
<input type="checkbox"/>	Jake Able	<input checked="" type="checkbox"/>		Standard User	

Create Portal User



Assign Portal Access and Security

1. All Portals that the Portal Admin has access to are displayed
2. Grant the Portal User access by checking the box in the **Grant Access** column
3. The Portal User's default security role will be selected; changing this role is optional
4. Click **Save** to create the Portal User. Emails containing login information will automatically be sent to the login ID (email address) of the Portal User

Edit Portal Users



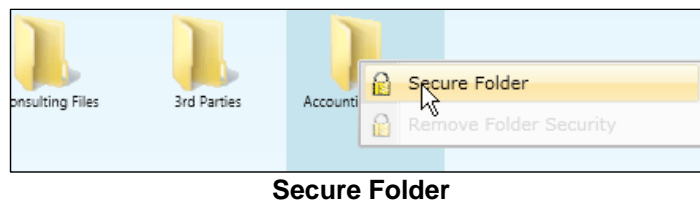
Access to Portal may be modified or terminated at any time. It is important to terminate access when no longer needed by the Portal User.



Click 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 Level Permissions

Portal Admin Users have the ability to restrict specific Portal Users from accessing selected folders within Portal.



Steps for Creating Folder Level Permissions

1. Right Click on the folder you wish to secure
2. Select **Secure Folder**
3. Choose Portal Users that will have rights to the folder by clicking the box to the left of the user's last name

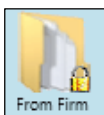
	Last Name	First Name	Email
<input checked="" type="checkbox"/>	Firm	Administrator	Nate.Brown@wolterskluwer.com
<input type="checkbox"/>	Nate	Brown	irish.nate.1979@gmail.com
<input type="checkbox"/>	Mary	Brown	mbrown.portal@gmail.com

Apply Folder Level Permissions to Portal Users

4. After selecting the Portal Users that will have access to the folder , click **Save**
5. A popup will display confirming the selected folder has been secured



To modify folder level permissions, right-click on a secured folder and select **Remove Folder Level Security**.



Secured Folder

Secured folders are easily identifiable as a lock icon is visible when navigating to folders on the Portal Homepage.

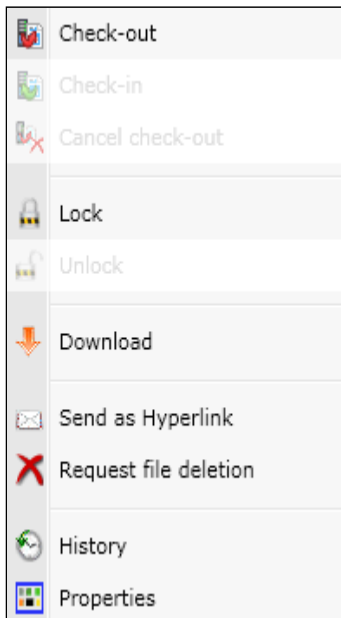
The Right Click Menu



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



Right Click Menu

Check-out	Download file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.
Check-in	Add checked-out file back to reflect any changes.
Cancel Check-out	This feature will make it 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-clicking 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.
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.

HELLAM VARON'S END USER LICENSE AGREEMENT (EULA)

This Client Portal Agreement (“Agreement”) is made by and between Hellam Varon & Co. Inc. P.S. (the “Firm”), and the undersigned (“Client” or “You”) effective on the date it is executed by the Firm’s authorized representative upon the following terms and conditions:

1. PURPOSE

The Firm owns and provides a Client Portal to permit easy and secure electronic transfer of documents between Client and the Firm and Client access to certain documents created or maintained by the Firm. The Client Portal web-based applications are exclusively provided to the Firm’s clients and intended for their use.

2. USE

By using any feature of the Firm’s Client Portal, Client consents to the following terms and conditions and acknowledges that the Firm is relying on your consent in allowing you to use the Firm’s Client Portal. Your continued use of the Firm’s Client Portal after the posting of any amended terms and conditions shall constitute your agreement to be bound by any such changes. The Firm may modify, suspend, discontinue or restrict the use of any portion of the Firm’s Client Portal, including the availability of any portion of the content at any time, without notice or liability.

3. SERVICE AVAILABILITY

The Firm will use its best reasonable efforts to provide 24-hour daily availability of the Client Portal Service. However, the Firm makes no representation or warranty that 24-hour service will be available. The Firm shall not be responsible for any error, omission, interruption, deletion, defect, delay in operation or transmission, communications line failure, theft or destruction or unauthorized access to the Client Portal. The Firm is not responsible for any problems or technical malfunctions of any telephone or fiber network or lines, computer on-line systems, servers or providers, computer equipment, software, failure of any e-mail to be received by the Firm on account of technical problems or traffic congestion on the Internet or at any website, or any combination thereof, including any injury or damage to the Client’s computer or peripherals related to downloading any materials in from the Client Portal.

4. SECURITY

Client Portal utilizes 256-bit, Secure Socket Layer (SSL) encryption with password protected access. Documents are encrypted before being passed over the internet and while being stored on the Portal. Documents are hosted on a Business Logic Layer, so a username and password are required to access files. In addition, documents added to Portal are scanned for viruses before being uploaded. All files are maintained behind firewalls to protect against outside intruders. The Firm will use its best efforts to make the Client Portal secure from unauthorized access. However, Client recognizes that no completely secure system for electronic data transfer has been devised.

5. LOGON ACCOUNTS AND THEIR SECURITY

a) The Firm will set up individual logon accounts for the client. All initial logon passwords will be transmitted to the designee by email, which will then be changed by you.

b) You acknowledge that the use of username and password is an adequate form of security. You are solely responsible for (1) authorizing, monitoring, controlling access to and maintaining the strict confidentiality of your username and password, (2) not allowing another person to use your username or password, (3) any charges or damages that may be incurred as a result of your neglect to maintain the strict confidentiality of your username and password, and (4) promptly informing the Firm in writing of any need to deactivate a username due to security concerns or otherwise. The Firm is not liable for any harm, outside of the firm's control, related to the misuse or theft of usernames or passwords, disclosure of usernames or passwords, or your authorization to allow another person or entity to access and use the Firm’s Client Portal using your username or password. You shall immediately notify the Firm of any unauthorized use of your username or password and any breach of confidentiality. Until the Firm receives this notification from you, you will be held liable for any harm ensuing from the use of your username on the Firm’s Client Portal.

6. TERMINATION OF LOGON ACCOUNT

Client agrees to notify Hellam Varon in writing when an individual logon account is to be terminated. The Firm will make every effort to confirm and terminate access as soon as possible. However, client cannot be assured that access has been terminated until Hellam Varon confirms the termination.

7. LINKS TO THIRD PARTY SITES

The Client Portal Website may contain links to other Websites ("Linked Sites"). The Linked Sites are not under the control of the Firm and the Firm is not responsible for the contents of any Linked Site, including without limitation any link contained in a Linked Site, or any changes or updates to a Linked Site. The Firm is not responsible for webcasting or any other form of transmission received from any Linked Site. The Firm is providing these links to you only as a convenience, and the inclusion of any link does not imply endorsement by the Firm of the site or any association with its operators.

8. NO UNLAWFUL OR PROHIBITED USE

As a condition of your use of the Client Portal Website, you warrant to the Firm that you or your approved users will not use the Firm's Client Portal website for any purpose that is unlawful or prohibited by these terms, conditions, and notices. You may not use the Firm's Client Portal website in any manner which could damage, disable, overburden, or impair the Firm's website or interfere with any other party's use and enjoyment of the Client Portal Website. You may not obtain or attempt to obtain any materials or information through any means not intentionally made available or provided for through the Client Portal Website.

9. THE FIRM

The firm reserves the right at all times to disclose any information as necessary to satisfy any applicable law, regulation, legal process or governmental request, or to edit, refuse to post or to remove any information or materials, in whole or in part, in the Firm's sole discretion.

10. CLIENT'S RESPONSIBILITY

You must at your own cost: (a) provide for your own access to the internet and pay any service fees, telephone charges and online service usage associated with such access, and (b) provide all equipment necessary for you to make such connection to the Client Portal, including a computer and modem.

11. DISPUTE RESOLUTION

The parties agree that any dispute between Client and the Firm relating to this Agreement, or the breach of it, shall, if negotiations and other discussion fail, be first submitted to mediation in accordance with the provisions of the Commercial Mediation Rules of the American Arbitration Association ("AAA") then in effect before resorting to arbitration. The parties agree to conduct the mediation in good faith and make reasonable efforts to resolve any dispute by mediation. Failure or refusal by either party to mediate shall not in any way affect any subsequent arbitration. The parties agree to conduct the mediation in Bellevue, Washington, or another mutually agreed upon location. If the dispute is not resolved by mediation, the dispute shall be subject to binding arbitration under the Dispute Resolution Rules for Professional Accounting and Related Services Disputes of the AAA, and judgment on the award rendered by the arbitrator may be entered in any court of competent jurisdiction. The arbitration shall be heard before one or more arbitrators selected in accordance with these rules. The parties agree to conduct the arbitration in Seattle, Washington, or another mutually agreed upon location. The arbitrator may only award actual damages and may not award consequential, exemplary, or punitive damages. The prevailing party in any arbitration or litigation shall be entitled to recover from the other party reasonable attorneys and expert witness fees, court costs, and the administrative costs, fees, and expenses of the AAA, as the case may be, incurred in the same, in addition to any other relief that may be awarded. Notwithstanding the provisions of the immediately preceding paragraph, neither the Firm nor Client shall be compelled to arbitrate any dispute between the parties which arises out of or is related to any claim asserted against either party by a third party unless the third party (whether one or more) agrees to join the arbitration or can be compelled to join it.

12. WARRANTIES

THE FIRM MAKES NO WARRANTY, EXPRESS OR IMPLIED, REGARDING THE EFFICACY OF THE SECURITY OF THE CLIENT PORTAL. THE CONTENT AND SERVICES ARE PROVIDED ON AN "AS IS" BASIS AND THE FIRM SPECIFICALLY DISCLAIMS ANY EXPRESS OR IMPLIED WARRANTIES,

INCLUDING WITHOUT LIMITATION, WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE, WARRANTIES OF MERCHANTABILITY OR WARRANTIES AGAINST INFRINGEMENT. THE FIRM, ITS AFFILIATES, EMPLOYEES, AGENTS SHALL NOT BE LIABLE FOR ANY DAMAGES OR LOSSES, INCLUDING, WITHOUT LIMITATION, INDIRECT, CONSEQUENTIAL, SPECIAL, INCIDENTAL OR PUNITIVE DAMAGES, RESULTING FROM OR CAUSED BY THE PORTAL, ITS CONTENT, SECURITY OR ANY SERVICES PROVIDED HEREIN. THE FIRM DOES NOT WARRANT THAT THE CLIENT PORTAL'S FUNCTIONS WILL BE UNINTERRUPTED OR ERROR-FREE, THAT DEFECTS WILL BE CORRECTED, OR THAT THE FIRM'S CLIENT PORTAL OR THE SERVER THAT MAKES IT AVAILABLE IS FREE OF VIRUSES OR OTHER HARMFUL COMPONENTS.

13. TERM AND TERMINATION

This agreement and the services contemplated by it may be terminated by either the Firm or Client with or without cause and with or without notice at any time. The Firm may at any time terminate in whole or in part the Firm's Client Portal without notice or liability.

14. MISCELLANEOUS

This is the entire agreement between the Firm and Client regarding its subject matter. This Agreement does not modify or affect any existing or future engagement letter or agreement between the Firm and Client. The Firm may, in its discretion alter, add to or delete the Terms and Conditions from time to time without any prior notice. Unless otherwise specified by the Firm all alterations, additions and deletions shall take effect automatically and be binding on and from the day they are posted on the Portal. This Agreement is made and entered into in the State of Washington and is to be construed under the laws of the State of Washington as they from time to time exist.