

CCH Portal

# Administrator Training









## Introduction

This course is designed to provide administrative training on CCH Portal, an easy-to-use and secure file exchange application. Not only can accounting firms securely transfer electronic files to their clients through Portal, they can also securely receive files from their clients as well. There is no file upload size limit associated with Portal, which makes it a perfect tool for the exchange of large files.

## Objectives

Upon completion of this course, you should be able to:

- Understand system considerations, user perspectives and roles of Portal
- Understand the components of the Portal Home Page
- Create and manage portals, folder templates, firm users, and portal users
- Manage folder level permissions, custom folders, and other portal specific capabilities
- Edit email notifications
- Manage deleted and expired portal files within the Recycle Bin

Icon Legend		Keys	Quick reference to the key aspects of a particular function
		Tip	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Write	Steps or information to write down
		Caution	Important warnings about a function
		Movie	Video clips with additional training tips

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## Understanding System Considerations and Browser Options

### Microsoft® Silverlight



Portal is built in Microsoft® Silverlight. You may be prompted to install Silverlight (prompt appears on the login page) the first time you attempt to login to Portal. The installation is simple and typically takes less than a minute to complete. Most browsers and operating systems are compatible with Silverlight, which is needed to access the main Portal interface. A complete list of browsers and operating systems that support Silverlight can be found at <http://www.microsoft.com/silverlight/get-started/install/default.aspx>.

### Mac Users



Mac users with Intel-based processors and a compatible browser can access Portal through the Silverlight interface. Mac users can verify if they are using an Intel-based processor by browsing to <http://support.apple.com/kb/HT1531>.



Portal may be accessed on iPads, other tablets, smart phones, and non-Intel-based Macs via a **Simple User Interface**, also referred to as the **Non-Silverlight Login** at <https://cchportal.ca/SUI/Login.aspx>. For more details on the Simple User Interface, see [Appendix B](#) of this guide.

### Multimedia Resources

Wolters Kluwer CCH provides online content that builds on this session for those that want to get the most value from Portal.



Click the following link to view a short video that addresses a successful deployment of Portal to your clients. <https://www.brainshark.com/cch/vu?pi=zGWzEMqBtz24kBz0>



Click the following link to view a short video called “Tips & Tricks”, where you will learn more about an efficient Portal workflow. <https://www.brainshark.com/cch/vu?pi=zFkzeCVICz24kBz0>

### Client-Ready Media



**Provide this Brainshark, which addresses basic portal use, to your clients.** A [Brainshark](#) is an easy to use online video presentation, and is accessible 24/7. View the entire video, which is about 10 minutes, or just watch certain clips using a table of contents. This link should be provided to your clients in email notifications and on your website. Access the Brainshark using the following link, <https://www.brainshark.com/cch/vu?pi=zGlzXzBJNz1T6tz0>.

## Defining User Perspectives and Roles

### *Portal User Perspectives*

#### **Collaboration Area**

Files are exchanged between the firm and its clients through the collaboration area, which every portal contains. Firm users can only upload and work with files in the collaboration area.

#### **Client Area**

The firm may create (if licenses are available) this optional area in a portal that your client can use as their own private cloud-based storage area. If you elect to offer client area, it is only a concern of those who create and manage portals; your staff (firm users) cannot work with client area in any way.

### *Portal User Roles*

#### **Firm Admin**

The firm admin is the first user created for the firm after the order for Portal is processed. The email address entered on the Portal order form receives the welcome email notifications from Wolters Kluwer CCH with a temporary password and login instructions. Your firm admin has all administrative rights within Portal and is responsible for setting up the first portal and creating other firm users.



Email addresses serve as login ID's in Portal. We recommend using a generic email address, not the email address of a staff member, for the firm admin login. Create a generic email account such as *administrator@domainname.com* or *portal@domainname.com* and enter it as the firm admin's email address/login ID. Doing this allows easier sharing among those who need this level of access and allows you to standardize the email address associated with many portal communications.

#### **Firm User**

The firm users are the employees of the firm who need access to Portal. Their work email address should be used as their login ID. The firm admin will initially create firm users and grant them access to portals. Firm users are assigned to specific portals; these are the only portals they can access.

#### **Portal Approver**

An approver is a firm user of a portal selected to receive email notifications related to that specific portal. Assigning approvers permits you to control who receives the emails related to a portal, which gives you much more flexibility in granting broader access to portals, as managing email volume is not a concern.

## Portal Admin

The portal admin user is always your client (taxpayer or primary business client contact) and is the first client-side user created for each portal. A portal cannot be set up without designating a portal admin user. The portal admin performs all basic Portal functions and controls access to the portal from an external or third party user perspective. The client's email address is used for the portal admin user ID.



Once an email address is used for a portal admin login, it is considered *burned* and cannot be used as the login ID for a firm user. Ensure that the work email address of staff members is not used as a portal admin user (especially for your firm training portal).

## Portal User

Portal users are the additional client-side, external, or third party users of Portal set up by either the portal admin or a firm user (with administrative rights) using an appropriate email address.



Some portals, like those for individual tax clients and sole proprietor business clients, may not require any additional portal users.

## Firm Admin Login

Login to Portal using the following URL: <https://cchportal.ca/Portal/#Default>.



If the Portal URL is incorrectly typed as “http” instead of “https,” Portal will automatically redirect the browser to the correct URL.

Figure 1



### Tips and Tricks for Logging into Portal:

- Login as the firm admin the first time using the email address and temporary password sent to that email address by Wolters Kluwer CCH.
- Every user of Portal is required to change their password upon their initial login.
- The new password (8-32 characters in length) must include at least one upper-case letter, one number, and one special character (e.g., !, @, #, etc.).
- Copy and paste your password to the password field on the login page by using right-click copy and then right-click paste or by using keyboard shortcuts Ctrl + C to copy and Ctrl + V to paste.



Do not select **Remember me** or **Remember my password** on any shared computer. Click **Forget me** to clear your login details from the computer’s memory.



Any user of Portal can reset their password by clicking the **Forgot your password?** link, entering their login ID (email address), and a secure code. Portal will automatically email the user a new temporary password. Users who have set up their security questions and answers also have the option to reset their password immediately without a password being sent via email.



## Getting Started Menu

When you login to Portal for the first time, you are greeted with a welcome message. After reading the welcome message, you are prompted to set up your security questions and answers. These can be used to reset your password if you forget it in the future.

Once your security questions have been set up, the Getting Started menu on the left expands to reveal step-by-step instructions for accomplishing frequently performed tasks. The Getting Started menu assists users with the basic functionality of Portal and is customized to the type of logged in user. Firm users, portal admins, and portal users see different options in the Getting Started menu.

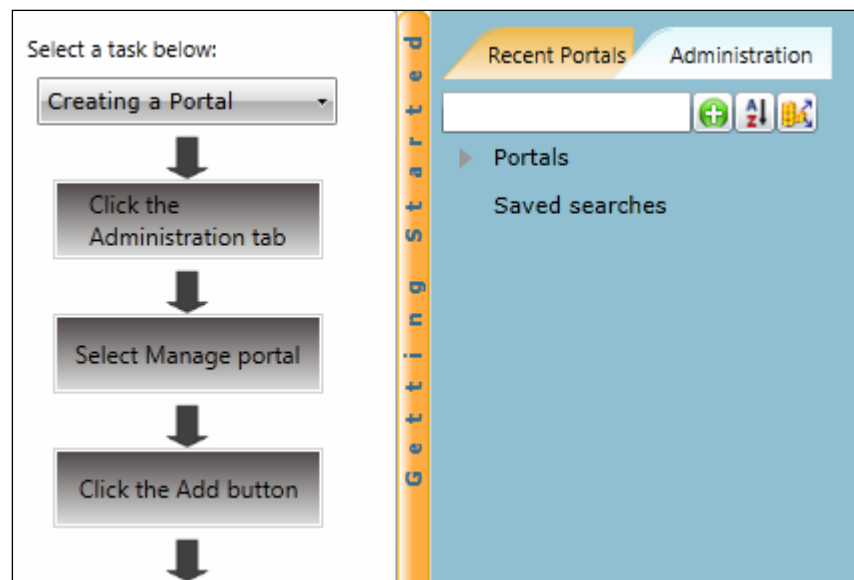


Figure 2



The Getting Started menu can be expanded and collapsed by clicking on the Getting Started ribbon, which turns orange as your mouse cursor hovers over it.

## Portal Home Page



Figure 3



## Portal Home Page Key Features

- 1 Portal Lookup** Search for your portals by typing any portion of the portal name and choosing from the auto-suggested results or by typing an entire user ID to view portals that are accessible to you. You can also type an email address to see all portals accessible to the user associated with that email address.
- 2 Navigation Pane** View administration options and your fifty most recently accessed portals.
- 3 Announcements** View announcements related to the selected portal.
- 4 Disk Space Meter** View space used by the selected portal, all other portals, and total available space.
- 5 Quick Search** Search based on any portion of a portal name, file name, or folder name.
- 6 Files and Folders** View files located in the folders of the selected portal.
- 7 Add Files** Click to initiate the file upload process.
- 8 Collapsible Panels** Choose from up to five panels designed to assist you with your Portal workflow:
  - Access the **files recently added** to your portals by all users.
  - View the **files expiring soon** before they flow to the Portal recycle bin.
  - View email **notifications** that were also emailed to you.
  - Set up **reminders** in a calendar view.
  - Set up **tasks** for yourself or other portal users.
- 9 Web Help** Click the **Question Mark** icon to access web-based help files.



On your initial login, you only see the Administration tab in the navigation pane because there are no portals set up in your account. You can view the home page after creating at least one portal.

## Creating Portals



The first action item for the firm admin is to create a firm *training* portal. As firm users are created, they should be granted access to this portal for training and testing purposes.



There are two components of creating portals:

- Creating portals – one at a time or in batches.
- Creating and managing folder templates.

### Creating New Portals

Click **Manage portal** in the navigation pane to view the **Manage Portal** screen, where you can create portals one-at-a-time or in batches.

Administration >> Setup >> Manage Portal >> Add Portal Add Portal

Portal Information

\*Portal Name (Client Name):

\*Portal Administrator's Login ID (Email Address):

Client ID - Sub ID:  -

\*Folder Template:

☒ Portal is active (users can log in) ☐ Enable Client Area

☒ Automatically expiry files after:

\*Client Area Size (MB):

Select Access Groups or Individual Users below to grant access to this portal.

Access Groups Individual Users

Access Group Name	Approver	Access Expires On
<input type="checkbox"/> Administrator	<input type="checkbox"/>	<input type="text" value="Enter date"/>
<input type="checkbox"/> Standard User	<input type="checkbox"/>	<input type="text" value="Enter date"/>

Figure 4



### Steps to create a single portal (non-batch):

1. At the bottom of the Manage Portal screen, click Add to access the Portal setup screen.
2. Type the *Portal Name* (your client's name).
3. Type the *Portal Administrator's Login ID* (email address of the primary client contact).
4. Enter the *Client ID* and *Sub ID*, if applicable (optional).
5. Choose a *Folder Template* from the drop-down list.
6. Check the box to enable *file expiration*, type a number and select a retention unit from the list box.
7. If applicable and licenses are available, check the *Enable Client Area* box and allocate a size limit.
8. Select *Access Groups* or *Individual Users* to assign **firm users** to the portal.
9. Choose the *Approvers*, those who will receive email notifications related to the portal being set up.
10. Click **Save and Close** to create the portal.



File expiry is not required. If left blank, the files in the portal do not expire. When files expire they flow to the Portal recycle bin. File expiration may be set per portal, folder (not global), and per file.



### Steps to create multiple Portals (batch):

There are two methods for batch portal creation. You can import an Excel template or enter the same information directly in Portal. The steps below address the Excel template.

1. Click Portal Creation Template at the bottom of the Manage Portal screen.
2. Save the file so it may be completed per the steps in the **Instructions** tab of the template.
3. Complete the *Data* tab, using one row per portal.
4. Click **Save** and **Close** the Excel template.
5. Click *Batch Portal Creation*, at the bottom of the **Manage Portal** screen, and click **Yes**.
6. Browse to and select your completed template file for upload.
7. Click **No**, when prompted, so that welcome email notifications remain enabled.
8. If errors are found in the template, you will be prompted to correct them in Portal.
9. Click **Yes** when prompted to download a process log.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Portal Name	Pfx Client ID	Client Sub ID	Portal Admin Email	Folder Template	Client Area	Client Area Size	Active	File Expiration Period	File Expiration Unit	Access Groups	Grant Approval Rights to All
2	Able, Jake			jake@ableco.tld	Individuals	No		Yes	2 Years		All	Yes
3	Able Construction, LLC			jake@ableco.tld	Businesses 1	Yes	100	Yes	1 Years		All	Yes
4	Able Moving Company			jake@ableco.tld	Businesses 2	Yes	100	Yes	90 Days		All	Yes
5	Grossman, Bob			bob@grossins.tld	Individuals	No		Yes	2 Years		All	Yes
6	Grossman Insurance LLP			bob@grossins.tld	Insurance Cos	Yes	100	Yes	3 Months		All	Yes
7	Stanley, Marcus			marcus@stanleytires.tld	Individuals	Yes	50	Yes	2 Years		All	Yes
8	Stanley Tires			marcus@stanleytires.tld	Businesses 1	No		Yes	1 Years		All	Yes
9	Allen, Michael			MA@allenautos.tld	Individuals	No		Yes	2 Years		All	Yes
10	Allen Auto Sales, LLC			MA@allenautos.tld	Businesses 1	No		Yes	3 Weeks		All	Yes
11	Pirelli Pizza Place			joey@pirellipizza.tld	Businesses 2	No		Yes	1 Years		All	Yes
12	A-1 Cleaners			rmiller@A-1Clean.tld	Businesses 1	No		Yes	1 Years		All	Yes

Figure 5



Granting firm users access to a portal automatically grants rights based on their default file management security role. See the [security roles](#) section of this guide for more details.



Select any portal in the **Manage Portal** screen and click **Edit selected** to edit the portal properties.



**One email address may be used up to 75 times as a portal admin user/login ID. This allows clients to access multiple portals with one set of login credentials.**



A report of the assigned firm users and portal users for each portal can be accessed from the **Manage Portal** screen by clicking **Print a list of all portals and the users who can access them**.



For additional guidance on creating portals, follow the link below to view a short instructional video.  
<https://www.brainshark.com/cch/PortalTraining>

## Managing Folder Templates

A folder template must be selected when a portal is created. Initially, only the *Default Folder Template* is available. Only one template can be assigned to a portal. Create folder templates based on different types of clients.

Figure 6



### Steps to create a folder template:

1. In the navigation pane, click **Manage folder templates**.
2. Click **Add** at the bottom of the page.
3. In the *Name* field, type your new template's name, e.g., *Business Clients*.
4. After typing the name, click the **yellow folder icon** or the **tab** key to apply the template's name.
5. Click **New folder**, type the desired folder name, e.g., *Tax Returns*, and then click **OK**.
6. Repeat steps 4 and 5 above until all desired folders are set up.
7. Click **Save** to save the new folder template, then click **Cancel** to exit the page.



Highlight a folder and click **New folder** to create a subfolder of the highlighted folder.



Click **Set as Default Publish Folder** to set default folders for the CCH applications for which integration with CCH Portal is available. For more detail, see [Appendix C](#).

### Folder Template Tips & Tricks:

- Select a template in the Manage Folder Templates screen by checking the box to the left of the template name and use the buttons at the bottom of the page to **copy**, **edit**, or **delete**. Click **Move Up** and **Move Down** to determine the order of the folders on the home page.
- **Custom folders** can be set up on a per-portal basis. Retention periods can be set at the folder level. Individual folder details are addressed later in this guide.

## Creating and Managing Firm and Portal Users



There are three components of managing firm users:

- Creating and managing security roles for the firm users.
- Setting up your firm users.
- Modifying or deleting firm users when necessary.



The firm admin should set up each employee that needs access to Portal as a firm user per the steps below.

### Security Roles

Security roles are assigned to users in order to grant or deny certain functional rights. It is important to understand the difference between the two types of security roles: administrative and file management.

- **Administrative** roles define setup and administrator rights in Portal. One default administrative role is available, called **Full Rights**. It grants all administrative functional rights, the ability to work with all of the setup, and configuration options shown in the Administration tab.
- **File Management** roles define basic end user rights, such as the ability to add, delete, search for, and work with files. There are four default file management roles in Portal: **Administrator**, **Standard User**, **Limited User** and **Read- Only User**. See [Appendix A](#) for more details on each default file management role.



The **Administrator** file management role does not grant administrative rights. It grants assigned staff members all file management rights in Portal.



You may need to create additional security roles to meet your firm's Portal workflow needs.

- A commonly used administrative security role is Portal Setup, only granting functional rights to create and manage portals.
- When creating firm users, you are not required to select an administrative security role.



### Steps to create a new security role:

- ▲ Security and Permissions
  - Administrative roles
  - File management roles

1. Click Administrative roles or File management roles.
2. Click **Create** at the bottom of the page.

Figure 7

Name :
Portal Setup
Description :
This role will only grant assigned Firm Users the rights to create and manage Portals

Figure 8

3. Type the *Name* of the new security role and enter a brief *Description*.

Module/Functional Description	Add	Edit/Perform	View	Delete
Firm Management	Not Applicabl	Not Applicabl	Not Applicabl	Not Applicabl
Account Management	Not Applicabl	Not Applicabl	Undefined	Not Applicabl
Storage Details	Not Applicabl	Not Applicabl	Undefined	Not Applicabl
Licensing Details	Not Applicabl	Not Applicabl	Undefined	Not Applicabl
Firm User Management	Undefined	Undefined	Undefined	Undefined
Portal Management	Undefined	Undefined	Undefined	Undefined
Folder Templates	Undefined	Undefined	Undefined	Undefined
Email Notifications	Not Applicabl	Undefined	Undefined	Not Applicabl
Security Group Management	Undefined	Undefined	Undefined	Undefined
Access Group	Undefined	Undefined	Undefined	Undefined
Folder Level Permission	Not Applicabl	Undefined	Undefined	Undefined
Announcements	Undefined	Undefined	Undefined	Undefined
Portal User Management	Undefined	Undefined	Undefined	Undefined
Portal Reports	Not Applicabl	Not Applicabl	Undefined	Not Applicabl

Figure 9

4. Select the appropriate option (**Grant**, **Undefined**, or **Never Allow**) for each functional right.
5. Click **Save** to create the new security role.



Security roles are additive, meaning that a firm user may be assigned to multiple roles at the same time. This means that a functional right set to *grant* in one role will override the same right set to *undefined* in another. A functional right set to *never allow* overrules both *grant* and *undefined*. When creating new roles, all functional rights will be set to *undefined* by default. *Undefined* denies the functional right in question, but does not prevent another role from *granting* this same functional right. It is recommended that *undefined* remain the default for each functional right you wish to restrict. See [Appendix A](#) for definitions of each functional right in Portal.

## Creating Firm Users

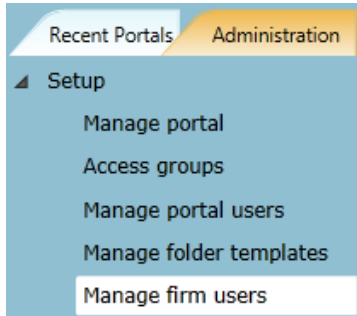


Figure 10



To access the Manage Firm User screen:

- Click the **Administration tab** of the Navigation Pane.
- Click Manage firm users.



Steps to create a firm user:

Figure 11

1. Click **Create** on the Manage Firm User page.
2. On the Personal tab, type the *Login ID (Email Address)*, *Last Name*, *First Name*, and select a *Default File Management Role*. The fields marked with an asterisk are required.
3. Check the box to **Grant user administrative rights** and select an **Administrative User Role** if the staff member requires additional permissions.
4. Click the **Portal Access and Security** tab and then click **Add Portal** to find the Training portal.
5. Select your Training portal, click **Add**, and then click **OK**.





## Steps to create a firm user, continued.

<input type="checkbox"/> Portal Name	Grant Access	Approver	Access Expiration	File Management Role
<input type="checkbox"/> CCH Training Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Enter date	<div>Standard User</div> <div>Administrator</div> <div>Standard User</div> <div>Limited User</div> <div>Read-only User</div>

Figure 12

6. Check the **Grant Access** box.
7. If necessary, check the box to make the firm user an **Approver** of this portal.
8. Choose an *Access Expiration* (optional).
9. If necessary, select a *File Management Role* from the drop-down list (their default file management role is already selected).
10. Click **Save** to complete the firm user setup.



When creating a new user or modifying the Portal access rights of an existing user, you can grant or deny access to multiple portals at one time:

Update Multiples

Select values to apply to the selected portals

☒ Grant access to selected portals

Access Expiration:

Enter date

File Management Role:

Standard User

☐ Deny access to selected portals

Save

Cancel

Figure 13

- Click the Portal Access and Security tab.
- Check the box to the left of the portals to be updated or select all portals.
- You can grant access with (or without) an *Access Expiration* date and modify the *File Management Role*.
- You can deny access to portals as well.



Firm users automatically receive two emails when they are set up: a welcome email that contains the Portal URL, login ID, and (a few minutes later) a temporary password to access Portal for the first time. You can also click **Reset Password** to send a new temporary password to a firm user.



## Editing Firm Users

Select the firm user (click the check box to the left of the user's last name) and choose **Edit selected** at the bottom of page. Make any necessary changes and click **Save**.



For additional guidance on creating firm users, follow the link below to view a short instructional video.  
<https://www.brainshark.com/cch/PortalTraining>

## Managing Portal Users

The first client user created for each portal is the portal admin. The portal admin can set up additional client-side users, referred to as portal users, to access their portal. Firm users with administrative rights can also set up portal users on behalf of the portal admin.

Figure 14 shows the 'Portal Access and Security' tab in the user management interface. It contains four required fields, each marked with a red asterisk (\*):

- Login ID (Email Address):** A text input field.
- Default Security User Role:** A dropdown menu currently set to 'Standard User'.
- Last Name:** A text input field.
- First Name:** A text input field.

Figure 14

Figure 15 shows the 'Portal Access and Security' tab with a table of portal users. The 'Show all portals' checkbox is checked. The table has five columns: Portal Name, Grant Access, Access Expiration, File Management Role, and Client Area.

Portal Name	Grant Access	Access Expiration	File Management Role	Client Area
<input type="checkbox"/> CCH Training Client, Inc.	<input checked="" type="checkbox"/>	Enter date	Standard User	<input type="checkbox"/>

Below the table is an 'Add Portal' button. At the bottom of the tab are three buttons: 'Update Multiple', 'Save', and 'Cancel'.

Figure 15



### Steps to create a new portal user:

1. Click **Manage portal users** from the administration tab.
2. In the *Portal Name* field, type the portal name the new user will have access to and click **View**.
3. Click **Create** at the bottom of the page and the Create Portal User window will open.
4. Enter the *Login ID (email address)*, set a Default Security User Role, and enter the user's *Last Name* and *First Name*. Completing the remaining fields is optional and not generally necessary.
5. Click the **Portal Access and Security** tab. The Grant Access column of the portal is selected.
6. Click **Add Portal** to search for and grant the user access to other portals, if needed.
7. Select a File Management Role from the drop-down list (the user's default is already selected).
8. Click **Save** to create the user, which also generates the new user welcome email notifications.



You may click the **Client Area** check box to grant the user access to the client area, if applicable. The portal admin should make this decision as the client area may contain sensitive information.

## Modifying Existing Portal Users



Grant or deny existing portal users access to other portals by searching for and modifying the user's profile. From the Manage portal user page, click the **arrow** near the **View** button and choose to search by portal name or email address. You must enter an entire email address to execute the email address search, which places you directly in the user's profile for editing purposes. For the portal name search, do a lookup based on portal name to display a list of portal users for that portal. The user can then be selected from the list for editing purposes.



## Resetting Passwords and Resending Welcome Email Notifications

Resend Email Notification	Email Delivery Status
Portal User Created-welcome email	Successful
<div><div>Reset password</div><div>Send email</div></div>	

Figure 16

- You must search for the portal user using the portal name search. The email address search does not allow access to the **Reset password** or **Send email** buttons.
- Click **Reset password** to send a new system generated password email to the user's email address.
- Click **Send email** to resend the Portal User Created-welcome email, the email delivery status area confirms successful delivery of the message.
- When you resend the welcome email, a separate password email is **not** sent. The user will need to access the forgotten password options on the Portal login page in order to reset their password.

## Creating Custom Folders and Setting Folder Level Permissions



Custom folders may be created, on a per portal basis, by the portal admin and firm users with certain functional rights. Access to both the template and custom folders may be restricted. Firm users with certain permissions may restrict access to folders from firm and portal users. The portal admin may restrict access for portal users, but not for firm users. The portal admin cannot be locked out of any folder on their portal(s). The firm admin may not be locked out of any folder on any portal.

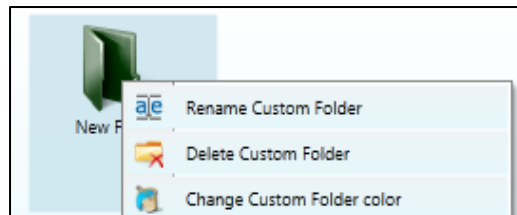


Figure 17



### Steps for Creating Custom Folders:

1. Use the navigation pane to access the portal that needs a custom folder.
2. Right-click in the background of the **Files and Folders** area and select **Create Custom Folder**.
3. The custom folder appears in the files and folders area as New Folder.
4. Right-click on the new folder, choose Rename Custom Folder and type the desired folder name.
5. Right-click again and choose Change Custom Folder color; this step is optional.

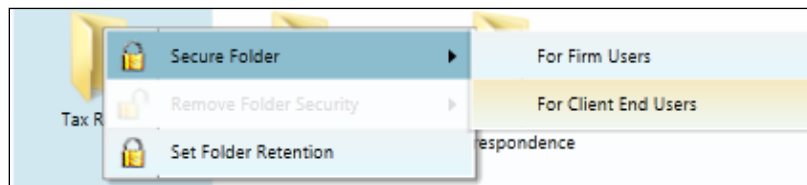


Figure 18



### Steps for Creating, Modifying and Removing Folder Level Permissions:

1. Use the navigation pane to access the portal for which folder level permissions are needed.
2. Right-click on the folder that needs access restricted, select **Secure Folder**.
3. Select **For Firm Users** or **For Client End Users** to view a list of all firm or client users of that portal.
4. From the list of users, click the check box for users that should continue to have access to the folder. You are checking the box to grant access, not to remove access.
5. Click **Save**. The folder is secured and users with access see a lock image displayed with the folder, indicating folder level permissions have been applied. Restricted users do not see the folder at all.
6. To modify existing folder level permissions, repeat steps 1 – 5.
7. To remove all folder level permissions, select **Secure Folder**, then **Remove Folder Security** and choose **For Firm Users** or **For Client End Users**.

## Setting Folder Retention

Firm users can set folder retention to override the file expiration period set at the portal level. New files added to a folder with a custom retention period inherit this retention period. When folder retention is applied, you have a choice to apply the new setting retroactively to files in the folder (based on their upload date) or apply the new retention period on a day-forward basis to new files only.

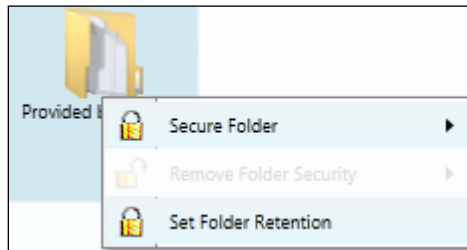


Figure 19

## Configuring Folder Level Retention

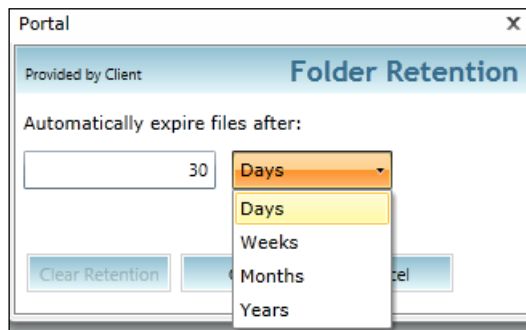


Figure 20

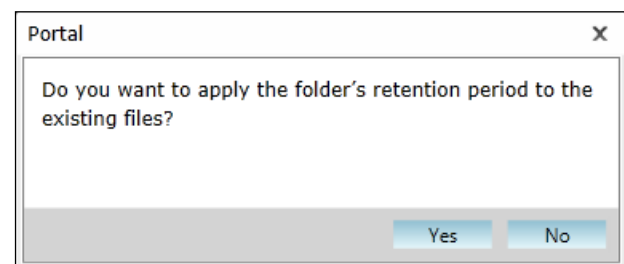


Figure 21

1. Right-click on a folder and select **Set Folder Retention**.
2. Type a number in the value field and select the corresponding retention unit from the drop-down menu.
3. After selecting the folder's retention period, click **OK** to apply the change.
4. If the folder contains files, choose **Yes** to apply the new retention period to existing files (based on their upload date) or **No** to only apply the change to new files.
5. A notification will display confirming your changes have been accepted, click **OK**.



Firm users have the ability to apply a custom retention period to a file from the right-click pop-up menu.

## Access Groups

Access groups are used to easily assign multiple firm users (with their default file management roles) to portal(s). Access groups can be assigned to portals during or after portal creation. An optional access expiration date can be set to remove the group's access to assigned portals.

	Access Group Name	Access Expires On
<input type="checkbox"/>	Administrator	
<input type="checkbox"/>	Standard User	
<input type="checkbox"/>	Everyone	12/31/2012

Figure 22

## Set up Access Groups

Figure 23

Figure 24

1. Click **Access groups** on the administration tab and click **Create**. You can also select an existing access group and click **Edit Selected** or **Delete Selected**.
2. The new access group window displays. Name the group and set an access expiration date if necessary.
3. Click the **Users** tab and use the arrows to add or remove firm users from the selected group.
4. Click the **Portals** tab and use the arrows to add or remove selected portals from the group. Portals assigned to the group are accessible by the firm users assigned to the group.
5. Click **Save** and then **OK** to save your changes. Click **Cancel** after saving to return to the access group summary screen.



For additional guidance on access groups, follow the link below to view a short instructional video.  
<https://www.brainshark.com/cch/PortalTraining>

## Editing Email Notifications

There are 16 email notifications in Portal triggered by events within the program. Emails can be disabled at any time by unchecking the Enabled box. You should spend some time examining the details (From, To, Subject Line, Message) of each notification and making appropriate edits to them.

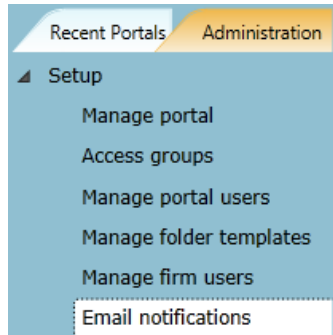


Figure 25



Steps to edit email notifications:

1. Click **Email notifications** in the navigation pane.
2. Click **Edit** to modify the email notification.
3. Evaluate the email from/to information (if applicable).
4. Edit the content of the subject line.
5. Edit the content of the email body.
6. Click **Save**.

Enabled	Email Notification Events	Edit Selected Event
<input checked="" type="checkbox"/>	Portal creation	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Portal deleted	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Portal User Created - Welcome Email	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Portal User forgotten password	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Security alert	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Disk space (Client area)	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Recycle bin size	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Add file to portal by firm user	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Firm User creation	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Firm User forgotten password	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Check in file to portal by firm user	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Add file to portal by portal user	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Check in file to Portal by portal user	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Portal User Created - Temp Password	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	File downloaded by portal user	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	File overwritten by Portal user	<a href="#">Edit</a>

Figure 26

Figure 27



The bracketed terms are fields that insert information from the Portal database (e.g., <Portal Name>). Click **Add Field** to insert available fields as needed.

You can attach a file to the **Portal Creation** and the **Portal user created – Welcome** emails. You should attach the *CCH Portal User Guide* to these emails to assist clients with Portal functionality.



**The file upload process for attaching files to email notifications does not show a progress indicator. Be sure to leave enough time for the file to successfully upload in order to avoid sending corrupted files to clients.**



When multiple files are uploaded to a portal at the same time, a single email notification is sent containing a list of the newly added files. One email is sent each time a user clicks Upload Files.



Approvers are the only firm users that will receive file activity emails; it is critical that approvers are selected for every portal in order to ensure the needed employees are notified when files are added. For additional guidance on the portal approver role, click the following link to view a short instructional video: <https://www.brainshark.com/cch/PortalTraining>.



## EULA (End User License Agreement) Setup

Portal allows firms to create and track an End User License Agreement (EULA). Once it has been published, portal users will not be able to access Portal without first accepting the firm's terms and conditions as stated in the EULA. A report that indicates the portal users that have accepted or declined the EULA may be viewed from this screen.

Administration >> Setup >> EULA EULA Setup

EULA - End User License Agreement

☒ Enable EULA ☒ Display Firm Logo in EULA

Use space below to create/edit your firm's end user license agreement

**1** **2** **3** **4** **5** **6**

**End User License Agreement**

Welcome to your portal. We at ABC Accounting Firm, LLC provide you with this secure and convenient resource in order to make it easier to exchange files with us. Your use of the portal constitutes your agreement to the terms and conditions outlined here.

ABC Accounting Firm, LLC reserves the right to make changes to these terms & conditions at any time. At such time, we will notify you of the changes. If at any time you are dissatisfied with the portal, its content, or the terms and conditions of use, your sole remedy is to discontinue your use thereof.

**User ID, Password & Security**

Using the portal and its related services requires the use of a password and a user name. Tampering with the site, misrepresenting the identity of the user, and conducting illegal or fraudulent activity on the site are

[View list of users that have accepted EULA](#)

Figure 28



### EULA Setup Key Features

- 1. Enable EULA** Select to enable or disable the EULA and choose if the firm's logo is included.
- 2. Formatting Tools** Format the EULA using word processor tools.
- 3. EULA Content** Type or paste the EULA content into this field.
- 4. Save** Click to save the EULA content so that it will be displayed going forward.
- 5. Publish EULA** Click to reset the EULA acceptance list. Users who previously accepted the EULA must do so again. Note: Clicking **Publish EULA** does not save the EULA content.
- 6. EULA Acceptance** Click **View list of users that have accepted the EULA** to view the EULA acceptance list, which may be printed or saved in multiple formats.



After changing the content of the EULA, be sure to click **Save** before resetting the EULA acceptance list by selecting **Publish EULA**.

## Manage Client Links

You can streamline and standardize the integration of Portal to other applications by setting up client links, which enables files to flow to the correct portal without requiring manual selection by firm users. These processes are described in detail in [Appendix C](#) of this guide.

## Customize Look and Feel

You have the ability to customize the appearance of Portal. Choose from one of the four pre-defined themes, or create a unique customized theme.

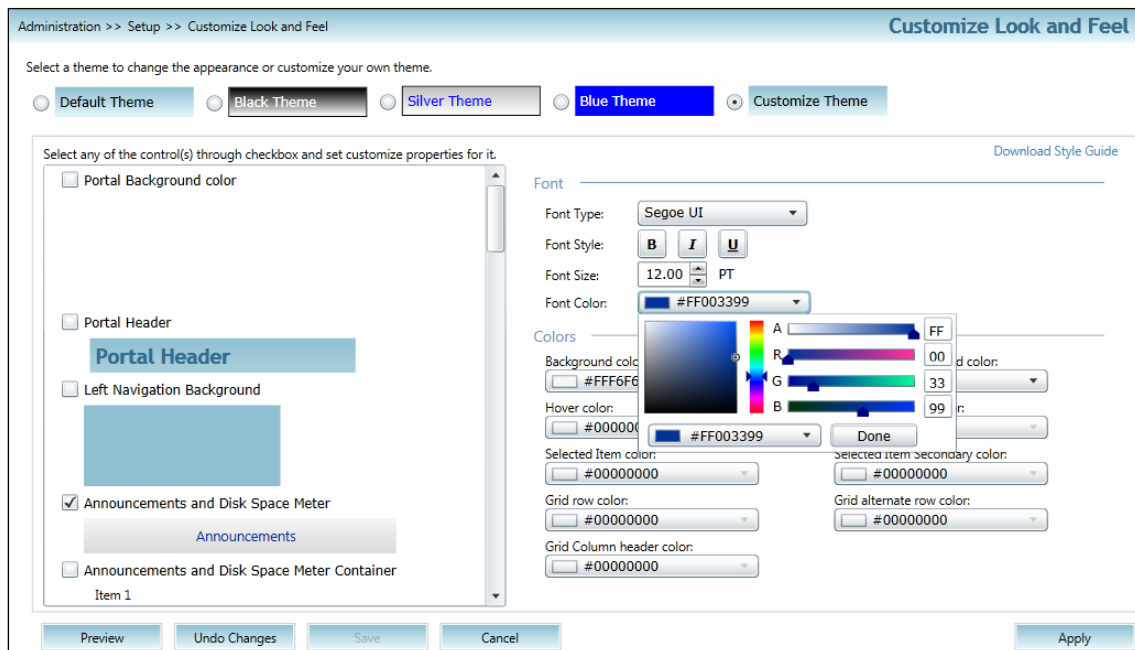


Figure 29



Click **Download Style Guide** for more assistance in customizing the look and feel of the portal interface.



In addition to the customization features, the firm's website designer can integrate the Portal login page to your website by inserting the following text into the site's HTML code:

```
<iframe style="height:350px; width:350px;" id="Iframe1" name="Iframe1"
src="https://portal.cchaccess.com/Portal/Home.aspx#Login"></iframe>
```

## Account Information

### Storage Details

The **Storage details** screen provides additional information in the form of the following two graphs:

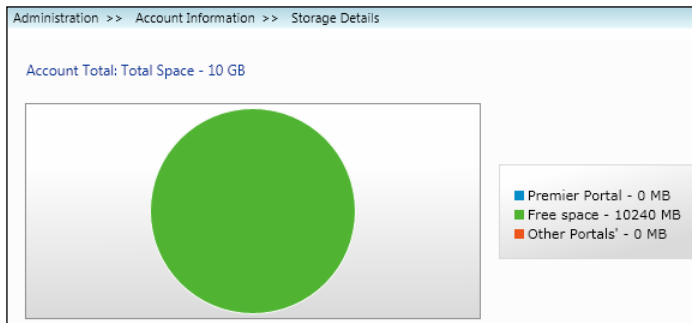


Figure 30

- A pie chart that outlines the total amount of space licensed by the firm and how that space is broken down between free space (green), the amount of space used by premier (collaboration area) portals (blue), and the amount of space used by client areas (red).
- A bar graph that details the number of megabytes used in both collaboration area portals and client area portals.

### Licensing Details

The **Licensing details** screen also contains two graphs, both pie charts:

- The first shows the total number of portals for which the firm is licensed, the number used, and the number remaining.
- The second shows the total number of client areas for which the firm is licensed, the number used, and the number remaining.

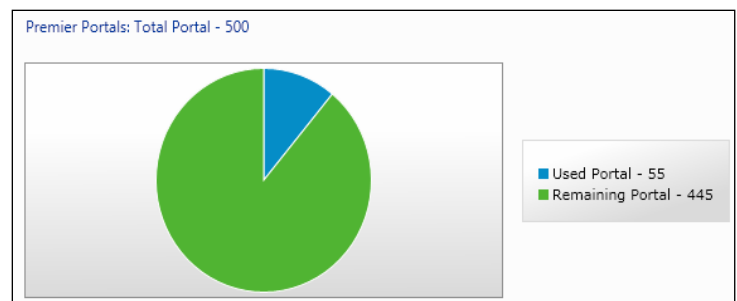


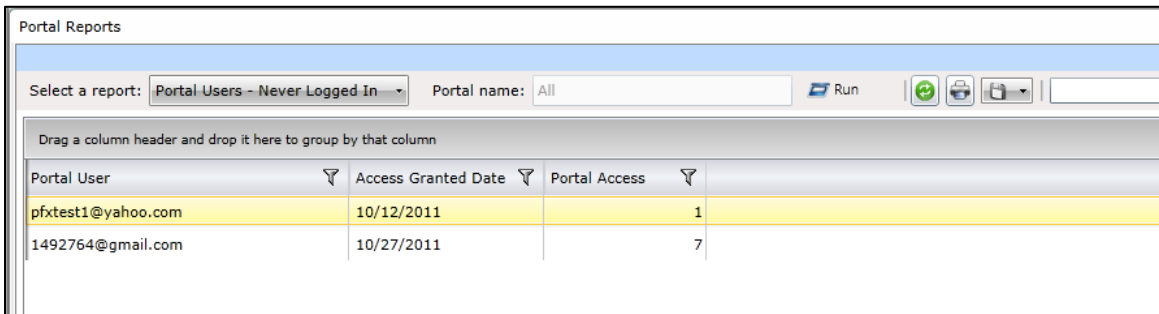
Figure 31



Deleting a portal **does not** automatically free up a used license. The firm will recoup that deleted Portal license during its annual renewal period for Portal.

## Portal Reports

Portal offers a set of standardized reports that allow you to monitor portals and their usage. Various reports may be run in order to verify that portals are being used as intended, to identify unexpected events, and more effectively manage the application.



The screenshot shows the 'Portal Reports' window. At the top, there's a header 'Portal Reports'. Below it, a 'Select a report:' dropdown menu is set to 'Portal Users - Never Logged In'. To its right is a 'Portal name:' text box containing 'All'. Further right are 'Run', 'Print', and 'Export' buttons. Below this is a section for grouping: 'Drag a column header and drop it here to group by that column'. The main table has three columns: 'Portal User', 'Access Granted Date', and 'Portal Access'. The first row is highlighted in yellow and shows 'pfxtest1@yahoo.com', '10/12/2011', and '1'. The second row shows '1492764@gmail.com', '10/27/2011', and '7'.

Portal User	Access Granted Date	Portal Access
pfxtest1@yahoo.com	10/12/2011	1
1492764@gmail.com	10/27/2011	7

Figure 32



Steps for creating a Portal report:

1. From the navigation pane, select **Portal Reports** and the reports window will launch.
2. **Select a report** from the dropdown menu.
3. Some reports are specific to certain portals. To select the portal, type any portion of the portal's name in the **Portal name** field and choose from the auto-suggested matches.
4. Click **Run** to generate the report.
5. Print to PDF or save the report to an available format. (Word, Excel, Text, etc.).

## Recycle Bin

When files are deleted or expired, they flow to the Portal recycle bin. Firm users with sufficient functional rights can view, restore, and permanently delete files in the recycle bin.

Administration >> Recycle Bin Recycle Bin

Set Maximum Size:

Name	Portal Name	File Location	Deleted By	Date Deleted	Size(KB)	File Type
<input type="checkbox"/> CCH Training Client, Inc 2009 Tax Workpaper.xlsx	CCH Training Client, Inc.	\\From Firm	KALLMANPORTAL@GMAIL.COM	2/15/2010	7	Microsoft Office
<input type="checkbox"/> CCH Training Client, Inc 2009 1120 Tax Return.pdf	CCH Training Client, Inc.	\\From Firm	KALLMANPORTAL@GMAIL.COM	2/15/2010	753	Adobe Acrobat
<input type="checkbox"/> CCH Training Client, Inc 2009 Issued Financial Statements.pdf	CCH Training Client, Inc.	\\From Firm	KALLMANPORTAL@GMAIL.COM	2/15/2010	753	Adobe Acrobat
<input type="checkbox"/> CCH Training Client, Inc Articles of Incorporation.pdf	CCH Training Client, Inc.	\\From Firm	KALLMANPORTAL@GMAIL.COM	2/15/2010	753	Adobe Acrobat
<input type="checkbox"/> CCH Training Client, Inc Organizational Chart.pdf	CCH Training Client, Inc.	\\From Firm	KALLMANPORTAL@GMAIL.COM	2/15/2010	753	Adobe Acrobat
<input type="checkbox"/> CCH Training Client, Inc 2009 Tax Planning Memo.docx	CCH Training Client, Inc.	\\From Firm	KALLMANPORTAL@GMAIL.COM	2/15/2010	9	Microsoft Office

Figure 33



You can filter the recycle bin by any of the column headers (name, portal name, deleted by, etc.) to make isolating files as efficient as possible.



Files purged from the recycle bin are not recoverable; you maintain strict control over who is granted the ability to permanently delete files.

## Appendix A: Functional Right Definitions

### Functional Rights – Administrative Roles

Select **Grant** to allow or **Undefined** to restrict the following functional rights. Select **Never Allow** to restrict a functional right and supersede the same functional right set to grant in other security roles when multiple roles are assigned to a single firm user.

Functional Right	Definition
<b>Administrative module</b>	
Account Management	View both storage and licensing details in the account information area.
Storage Details	View the storage details section in the account information area.
Licensing Details	View the licensing details section in the account information area.
Firm User Management	Add, edit, view, and/or delete firm users.
Portal Management	Add, edit, view, and/or delete portals.
Folder Templates	Add, edit, view, and/or delete folder templates.
Email Notifications	Edit and/or view email notifications.
Security Group Management	Add, edit, view, and/or delete security roles.
Access Groups	Add, edit, view, and/or delete access groups.
Folder Level Permissions	Set up, modify, view and/or delete folder level permissions.
Announcements	Add, edit, view, and/or delete announcements.
Portal User Management	Add, edit, view, and/or delete portal users.
Portal Reports	Add, edit, view, and/or delete Portal reports.
<b>Recycle Bin Module</b>	
Recycle Bin	View the recycle bin.
Restore	Restore files from the recycle bin back to Portal.
Permanently Delete Files	Purge files from the recycle bin.



### Default Administrative Roles

The default administrative role in Portal is **Full Rights**. The full rights role cannot be modified.



Only users who will perform administrative functions require any administrative role assignments. Users with no administrative responsibilities in Portal should not be assigned an administrative role.

## Functional Rights - File Management Roles

Select **Grant** to allow or **Undefined** to restrict the following functional rights.

Functional Right	Definition
<b>File Management Module</b>	
Append to PDF	Append a PDF file to a duplicate file during the add files process.
Check In/Out	Check-out files for editing purposes and then check-in the files.
Cancel Check Out	Cancel a file check-out (i.e. make it as if the check-out never occurred).
Download	View or save a copy of the file.
Files	Add files, view files, and/or delete files from Portal.
History	View the file's history.
Lock/Unlock	Lock files to prevent modification. Users will be able to unlock any file they locked.
Overwrite Duplicate Files	Overwrite an existing file with a new file which has the same name and file application (prompted during the upload process).
Send as Hyperlink	Send a hyperlink to a file in Portal to another user with access to the portal the file resides in.
Send to Engagement	Send the file to CCH Engagement. This feature requires version 6.11 or higher of Engagement installed on the user's computer.
Properties	View and edit a file's properties.
Rename	Rename a file.



### Default File Management Roles

The default File Management Roles in Portal are:

- The **Administrator** role grants full file management rights to assigned users.
- The **Standard User** role denies the ability to overwrite existing files but grants all other file management rights.
- The **Limited User** role grants assigned users rights to the basic functionality of Portal. Other functions, such as locking and unlocking files and appending to existing PDF's are denied.
- The default **Read-only User** role grants assigned users the right to search for and download files.
- The final **Upload Only User** role only grants the right to add files to a portal.



All users require a default file management role; however file management roles may be changed on a per portal basis as needed

## Appendix B: Simple User Interface

The Simple User Interface (SUI) is a basic HTML interface designed to allow Portal access on devices that do not support Microsoft Silverlight. The core features of Portal are available, such as adding and downloading files.



Smartphone and tablet devices can access Portal using the Simplified User Interface in order to download files.

### Login to the Simple User Interface

Login to the SUI using the following URL: <https://cchportal.ca/SUI/Login.aspx>.

**Login**

\* Required Fields

\* Login ID (Email address):

\* Password:

☐ Remember me  
☐ Remember my Password

[Forgot my password?](#) [Forgot me](#)

Figure 34



## Simplified Portal Home Page

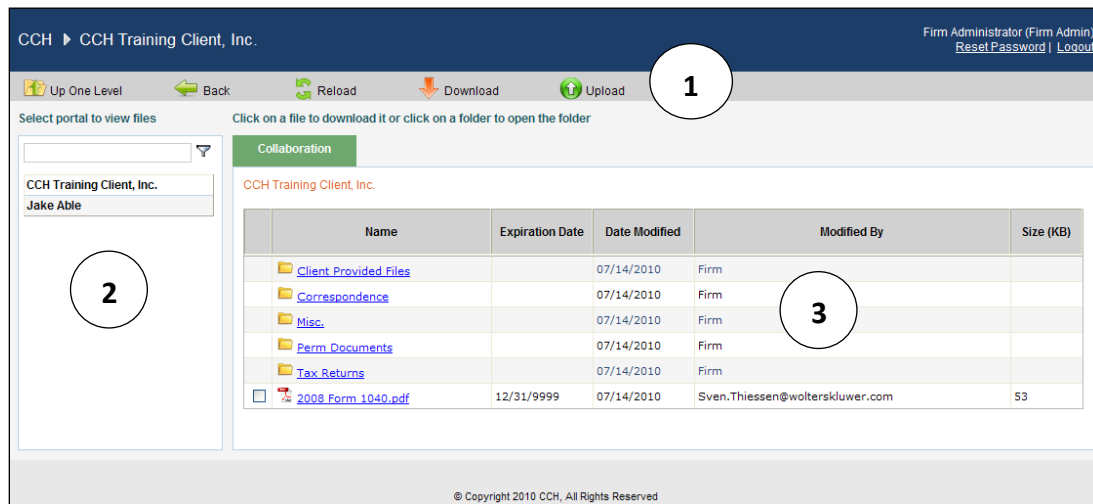


Figure 35

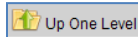


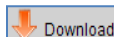



## Home Page Key Features

- 1 Menu Bar** Used to navigate through Portal functionality.
- 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

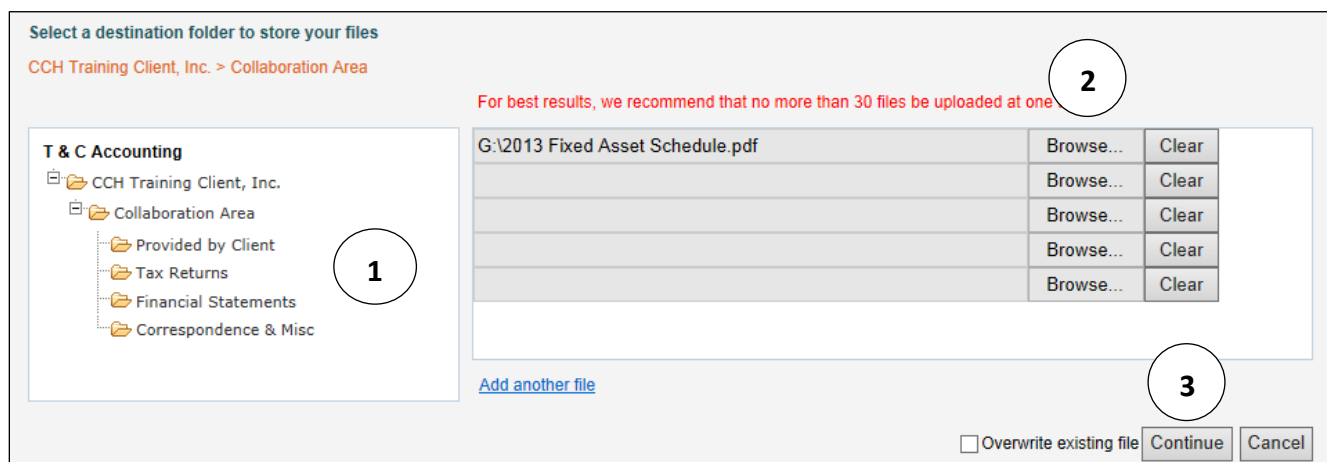
-  Move up one folder level within the files and folders.
-  Return to the previous screen.
-  Refreshes the portal to reflect recent changes.
-  Click to download the selected file(s). Multiple files are downloaded in the form of a single zip file. Select files by clicking the box to the left of the file name.
-  Click Upload Files to add a file to the selected portal.

## Download Files from the Simplified Portal

A simple and easy way to download (view or save) a file is to click the linked file name. The File Download prompt appears, enabling the file to be saved or viewed.

## Add Files to the Simplified Portal

Click  in the menu bar to initiate the add files process.



Select a destination folder to store your files

CCH Training Client, Inc. > Collaboration Area

For best results, we recommend that no more than 30 files be uploaded at one

**1**

**2**

**3**

☐ Overwrite existing file

Figure 36



Steps to add files to Portal:

1. In the folder selection pane, select the file location (destination folder in Portal).
2. Click **Browse** and select file(s) to upload via Windows Explorer.
3. Verify the file location and click **Continue** to add the file(s) to Portal.

## Appendix C: Portal Integration

Portal integrates directly with the following applications: ProSystem fx Tax (Tax), CCH Engagement, and CCH Document). The integration greatly simplifies the task of adding files from these applications to portals. The integration greatly simplifies the task of adding files from these applications to portals.

### Configuring Portal for Integration

#### Set Default Publish Folder

To make adding files from other applications easier, configure **Set as Default Publish Folder**.

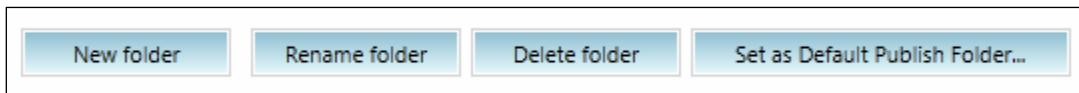


Figure 37

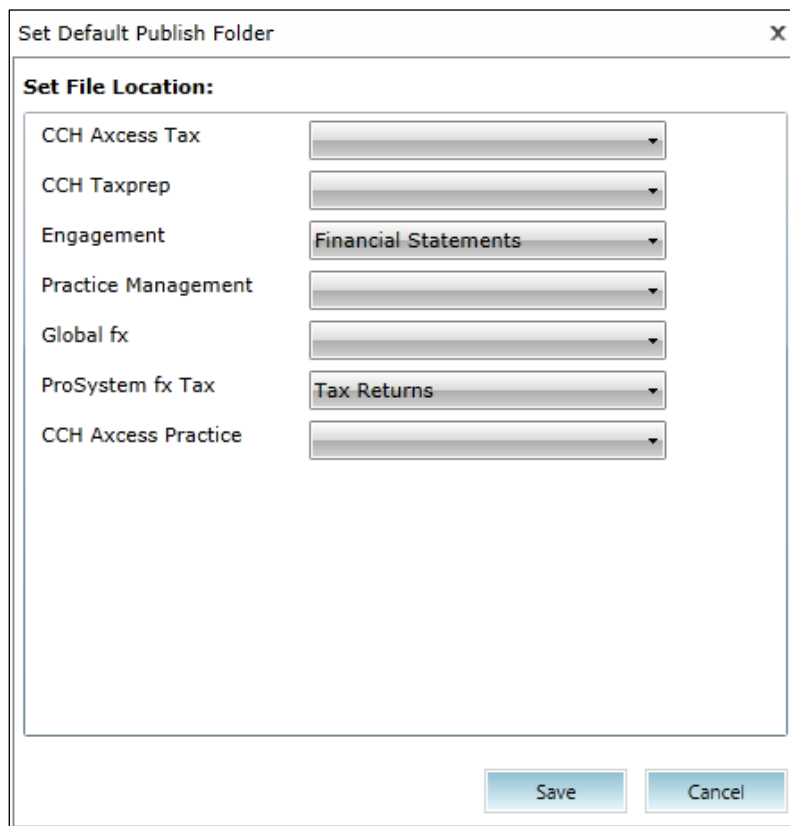


Figure 38



#### Steps to Set Default Publish Folders:

1. Select **Manage Folder Templates**, select a folder template and click **Edit Selected**.
2. Click **Set as Default Publish Folder**.
3. From the drop-down menu for the application, choose the folder where the files should flow.
4. Click **Save** to retain your selection.



## Global Configuration

The next setup item, Global Configuration, controls two features: elevated permissions and the tax file naming convention.

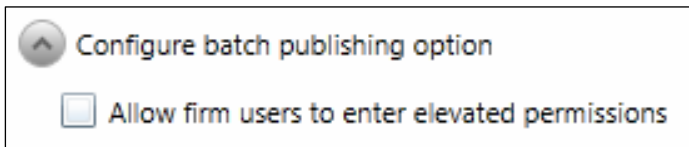


Figure 39

If Portal is set to *Allow firm users to enter elevated permissions*, users with higher-level permissions can temporarily assign these permissions to other users. For example, an administrative staff member may be batch publishing organizers to Portal but does not have access to all the necessary portals. In this scenario, if *Allow firm users to enter elevated permissions* is enabled, the application prompts the user to enter the login credentials of a user with access to the necessary portals.

## Tax File Naming Convention

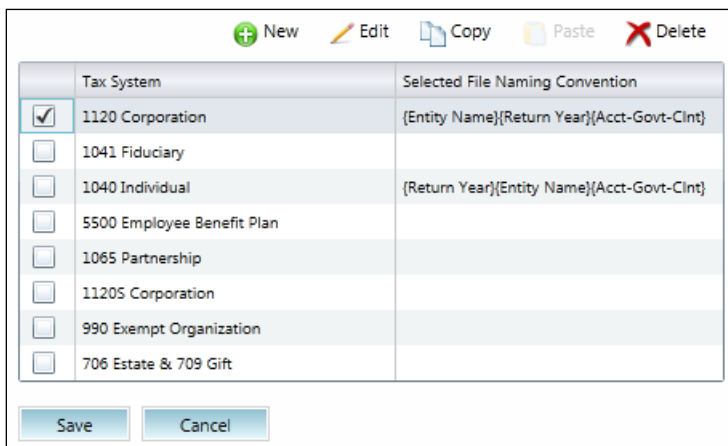


Figure 40

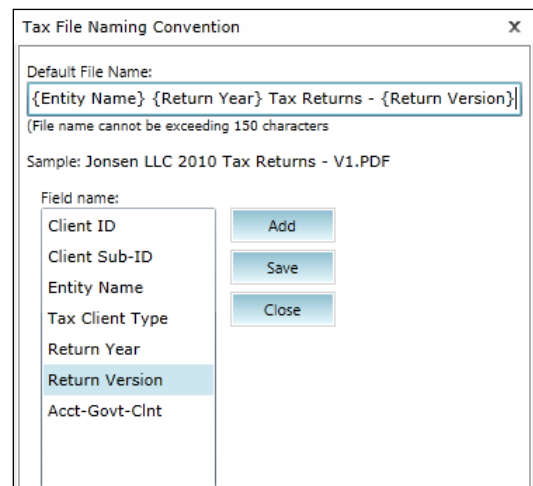


Figure 41

### Steps to configure tax file naming conventions:

1. Check the box for a return type and click **New**.
2. The Tax File Naming Convention window opens.
3. Add fields from the list by selecting them and clicking **Add**.
4. The field is inserted into the *Default File Name*.
5. Custom text and punctuation can be included as well.
6. A sample file name is shown for clarification.
7. Click **Save** when finished.

## Manage Client Links

Link ProSystem fx Tax clients to portals in order to batch print organizers to each client's portal. Linking organizers in batches may be done in the **Add client links** section or manually by entering information for each portal via **Edit client links**.

### Adding Client Links

To link batches of organizers to their associated portals, you will import a file exported from Office Manager in ProSystem fx Tax.

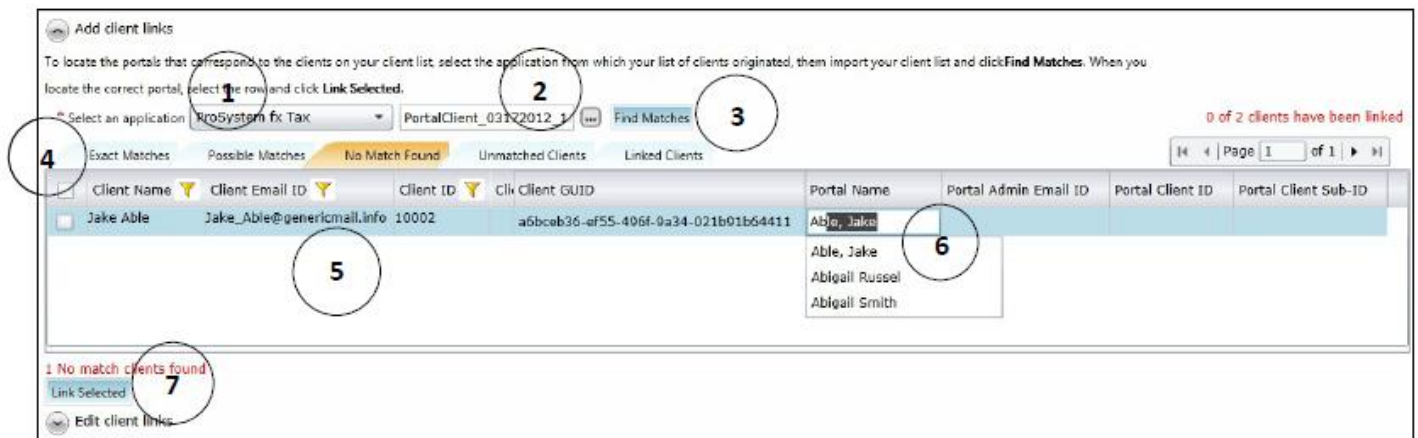


Figure 42



### Edit Client Links Section Key Features

1. **Select an application** - Select ProSystem fx Tax.
2. **Choose File** - Select the previously exported client list from ProSystem fx Tax.
3. **Find Matches** - Click to have Portal attempt to match the Tax clients to portals.
4. **Matching Tabs** - View different matching statuses in each separate tab.
5. **Client listing grid** - Displays the clients imported from Tax that are exact or possible matches for existing portals and clients for which no matches have been found. You can also view all unmatched clients and all linked clients.
6. **Portal Name field** - Match a Tax client to a portal by doing a Portal lookup, if necessary.
7. **Link Selected** - Click to link the selected Tax clients to their portals.



A client in Tax cannot be linked to more than one portal, and a portal cannot be linked to more than one client in Tax.



In ProSystem fx Tax's Office Manager, click on the Tools menu, and select the option labeled **Export Client List for ProSystem fx Portal** to export the client list you will import into Portal for the batch linking process.

## ProSystem fx Tax Integration

### Adding Portal Login Credentials to Tax

In order to batch publish organizers to Portal from ProSystem fx Tax, you need to provide your Portal login credentials to Tax and generate a client list for setting up client links in Portal, as outlined below.



#### Steps to Enter Portal Login Credentials to ProSystem fx Tax:

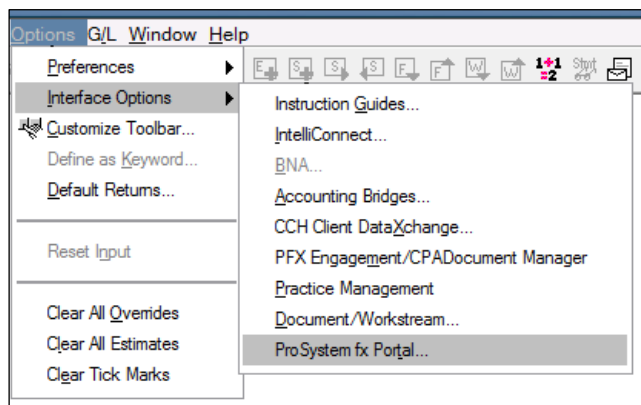


Figure 45



Figure 46

Click **Options** in the menu bar of the Tax application, select **Interface Options**, and then choose **ProSystem fx Portal**. Enter your Portal **User ID** and **Password** and click **Save**.

## Printing Tax Returns to Portal

The Portal integration with ProSystem fx Tax (firm hosted and SaaS) works effectively the same way.

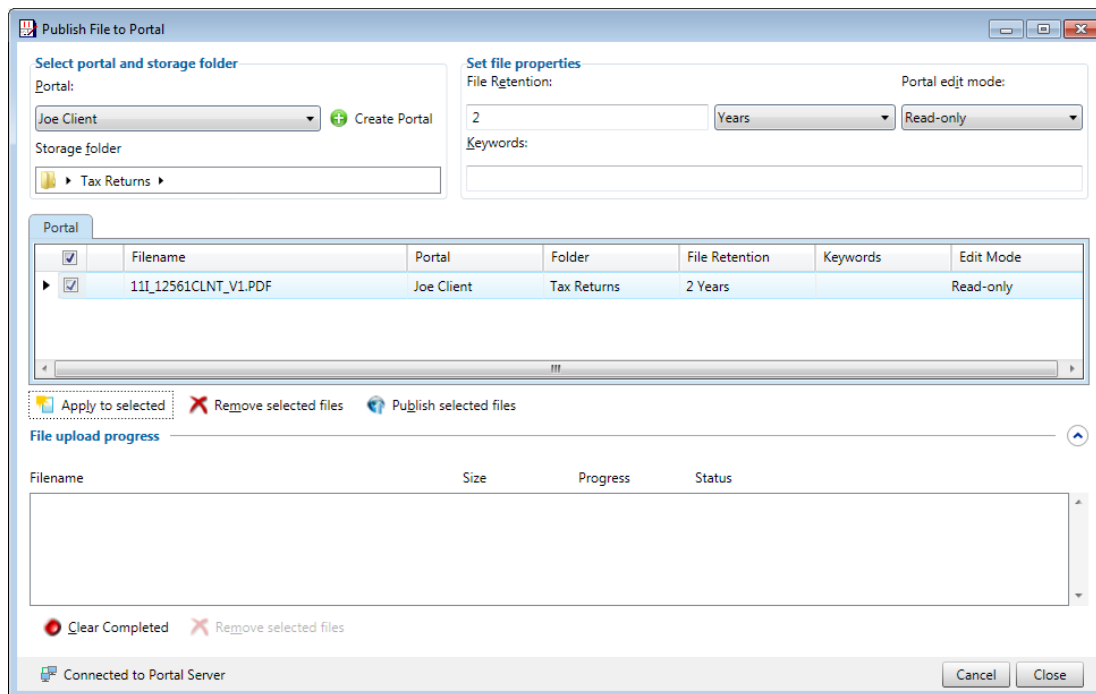


Figure 46



### Steps to Print PDF Tax Returns to Portal:

1. In Tax, select **File/Print/Entire** Return to view the print options menu.
2. Select at least one return copy and choose to print **To PDF File**.
3. Click the **Print to Portal** check box and then click **OK**.
4. Choose your local save location for the PDF file (local folder, outside of Portal) as well as the file name. If the firm is using the file naming convention, file names should not be changed.
5. If you did not previously enter your login credentials for Portal, you are prompted for them now.
6. The Publish File to Portal page launches.
7. Apply Portal properties to the file:
  - a. The portal name and storage folder will be pre-populated based on the setup items you choose to address. However, these can be changed by selecting the Portal drop down list and choosing a different portal.
  - b. Only apply a *File Retention* period for the file if you have a reason to override the default.
  - c. Choose the *Portal Edit Mode*. **Read-only** files may be viewed or downloaded. **Editable** files may be checked-out, edited and checked-in by any user.
  - d. Enter a *Keyword* if needed.
  - e. Click **Apply to Selected** to apply your properties to the file.
8. Click **Publish Selected Files** to send the file to Portal.



### Tips & Tricks for completing the Publish File to Portal Screen:

- Firm users with administrative rights can create portals from the **Publish File to Portal** window.
- Clear completed uploads to Portal by clicking on the **Clear Completed** button at the bottom of the dialog box.

### Batch Publishing Organizers to Portal

Publish organizers to your clients' portals for them to download, complete and return to you.

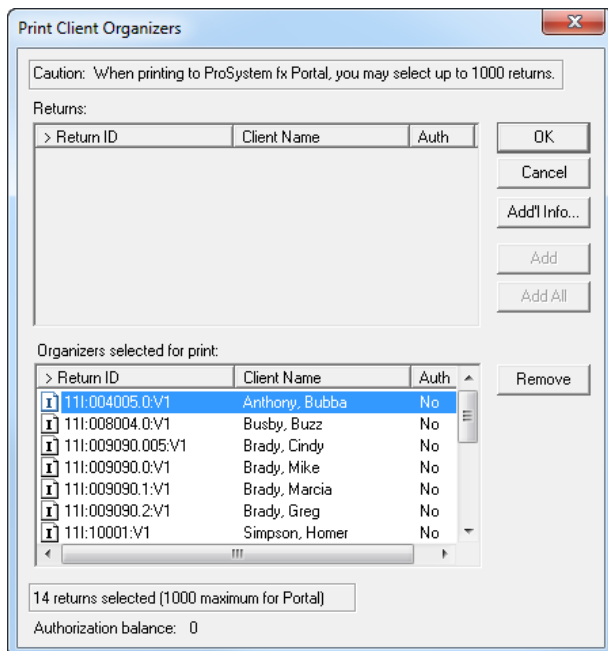


Figure 47

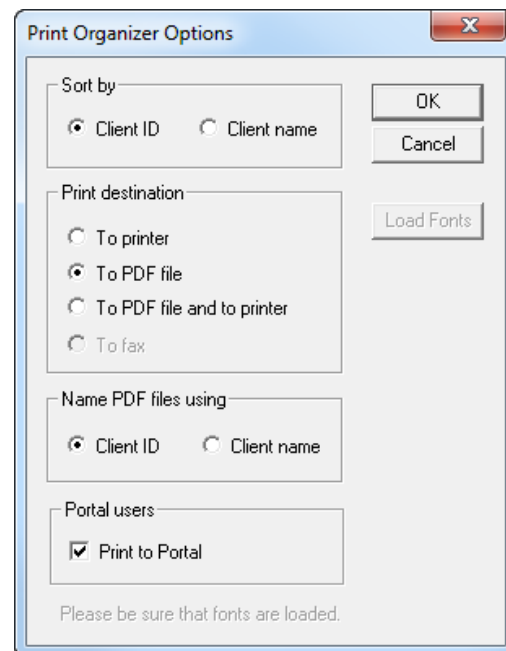


Figure 48



### Steps for Publishing Organizers to Portal:

1. Open the **Production Processing** module of ProSystem *fx* Tax.
2. Select **Process Client Organizers** and choose the option to **Print Organizers**.
3. Select organizers based on **Client Type**, **Office Group**, and **Preparer**.
4. In the screen that appears next, select the organizers to print by clicking **Add**.
5. Once all clients have been selected, click **OK** to advance to the next screen.
6. Choose to print either To PDF file or To PDF file and to printer.
7. This activates a check box labeled **Print to Portal**, click on it and then click **OK**.
8. Tax generates the PDF organizers and automatically uploads them to the selected clients' linked portals.
9. Organizers of clients that have not been linked appear in a manual **Publish File to Portal** screen so you may choose file properties and send them to Portal.



## CCH Engagement Integration

No installation is necessary to enable the Engagement-Portal integration in Engagement version 6.1 and higher.

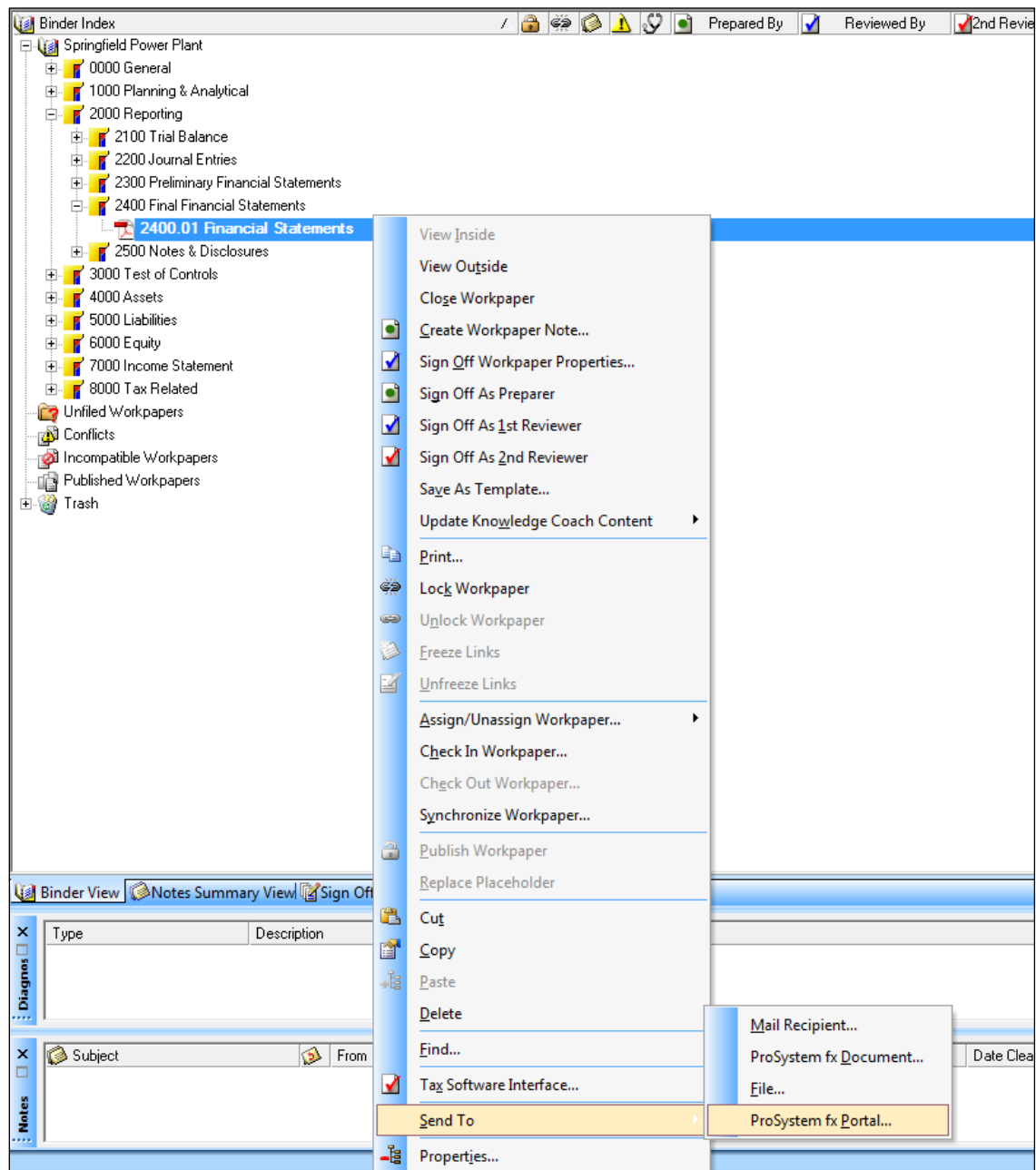


Figure 49



### Steps to Send Files from Engagement to Portal:

1. Synchronize or perform an express sync of a binder.
2. Highlight and then right-click on the file(s) that will be sent to Portal.
3. Hover your mouse cursor over **Send To** and choose **ProSystem fx Portal**.
4. Select the file format (original format, published file, or PDF file).
5. Enter your Portal login credentials (if prompted).
6. Apply Portal properties to the file:
  - a. Select the target Portal from the drop-down list.
  - b. Click **Browse** and select the folder where the file should reside.
  - c. Only apply a File Retention period for the file if you have a reason to override the default.
  - d. Choose the Portal edit mode. **Read-only** files may be viewed or downloaded. **Editable** files may be checked-out, edited and checked-in by any user.
  - e. Enter a Keyword if needed.
  - f. Click **Apply to Selected** to apply your properties to the file.
7. Click **Publish Selected Files** to send the file to Portal.

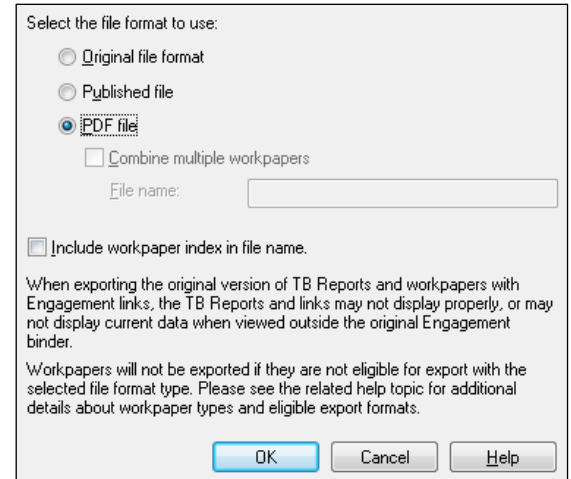


Figure 57

## CCH Document Integration

### Publish files directly from Document v3.9 to Portal

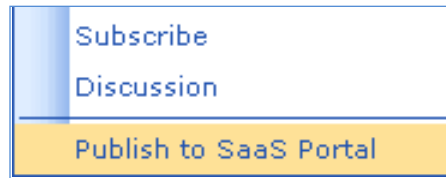


Figure 52

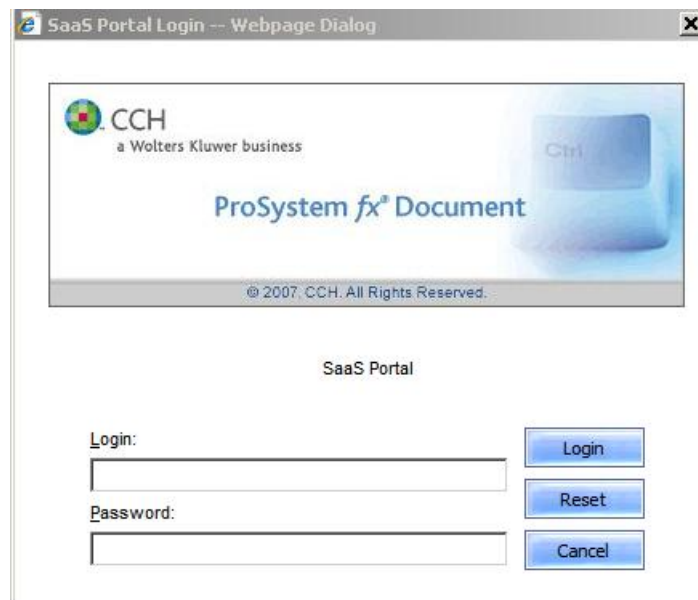


Figure 53



#### Steps to publish files from Document to Portal:

1. Locate the file you need to publish (client file list, search results, recently accessed documents).
2. View the file's Local File Menu and choose Publish to SaaS Portal.
3. When prompted, enter your Portal login credentials and click **Login**.
4. After login, the **Publish File(s) to SaaS Portal** window launches.
5. Apply Portal properties to the file:
  - a. Select the target *Portal* from the drop-down list.
  - b. Click **Browse** and select the folder where the file should reside.
  - c. Only apply a *File Retention* period for the file if you have a reason to override the default.
  - d. Choose the Portal *Edit Mode*. **Read-only** files may be viewed or downloaded. **Editable** files may be checked-out, edited and checked-in by any user.
  - e. Enter a *Keyword* if needed.
  - f. Click **Apply to Selected** to apply your properties to the file.
6. Click **Publish Selected Files** to send the file to Portal. A confirmation window will appear verifying the file was published successfully.



Publish multiple files simultaneously via the **Group Operations menu**. Check the box to the left of the local file menu for each file you need to publish and choose **Publish to SaaS Portal** in the group operations menu.

**Publish File(s) to SaaS Portal -- Webpage Dialog**

**Select portal and storage folder**

Portal: CCH Training Client Create Portal

Storage folder: //CCH Training Client/Correspondence Browse...

**Set file properties**

File Retention: 30 Days Portal edit mode: Read-Only

Keywords:

**Files**

<input checked="" type="checkbox"/>	File name	Portal	Folder	File Retention	Keywords	Edit Mode
<input checked="" type="checkbox"/>	Email to Client re TB dated 2.8	CCH Training Client	//CCH Training Client/Corresp	30 Days		Read-Only

Apply to selected Remove selected files Publish selected files Cancel

Figure 62



Create additional portals on-the-fly by clicking **Create Portal** in the Document publish files window. To add files from Portal to Document, login to Portal and download the file. Choose the **Document Drive** or **Extended Storage Area** as the save location so that files flow directly into Document.

## Appendix D – Browser Considerations

The following settings are not applicable to Internet Explorer version 9-11. If you are using Internet Explorer version 7 or 8, the following settings are optional but will make using Portal easier.

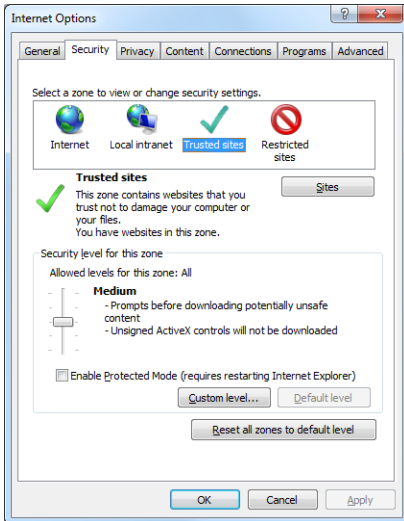


Figure 55

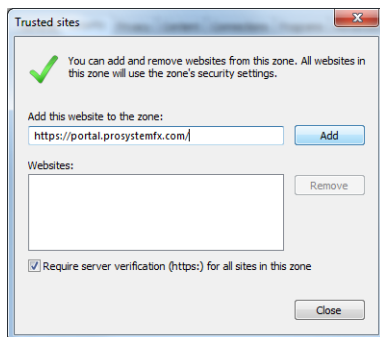


Figure 56

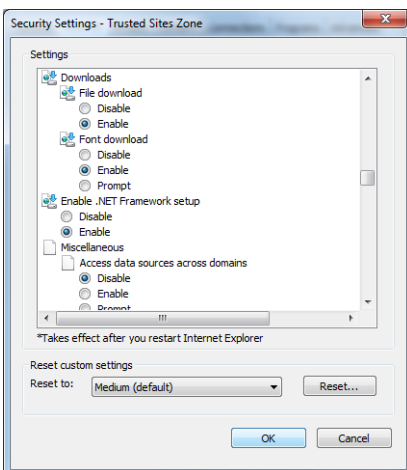


Figure 57



### Internet Explorer Settings:

1. Open Internet Explorer and browse to <https://cchportal.ca/Portal/#Default>.
2. In Internet Explorer, select **Tools** and **Internet Options**. Click the **Security** tab, click **Trusted Sites**, and click the **Sites** button.
3. Click **Add** to move the Portal URL to the Trusted Sites zone, and click **Close**.
4. Click **Custom level**.
5. Select **Enable** for Automatic prompting for file downloads.
6. Select **Enable** for File Download.
7. Click **OK** to save the changes.