PORTAL USER GUIDE

About Portal

Portals are web-based applications that allow for the encrypted, bi-directional transmission and storage of electronic data. In other words, you have instant access to documents and information wherever and whenever you want. A portal, is a place where files can be uploaded, downloaded, stored and shared in a safe and secure environment — 24/7. Why is my accountant using a portal?

- It's easy to use — This user guide contains simple instructions, but if you've ever used online banking or email, you'll find your portal to be intuitive and easy to learn. Once we create your portal you will receive a few introductory email notifications with additional information and your specific login credentials.

- It's secure — Portals are the most secure way to exchange documents electronically. With identity theft on the rise, portals provide you with peace of mind knowing that the only person who can access your files is you and anyone you designate.

- It's convenient — Whether you want to locate last year's tax return or need to urgently upload a file to send our way, you can do so – anytime, anywhere, thanks to 24/7 access. You won't have to wait for the postal service or make a trip to our office — just log in and get to work. Share PDF files, Microsoft® Excel® spreadsheets, QuickBooks company files, Microsoft® Word documents, PowerPoint® presentations and financial software data files — and more!

How Else Can I Use My Portal?

You have the capability to grant portal access to anyone — such as a banker who you may collaborate with on a regular basis. Prior to the convenience of portals, options to share information included email, fax, courier or postal mail. In many cases, you had to request the information from our firm before you could provide it to the bank, and vice versa. Portals have significantly reduced the time and resources spent on trading information.

Your portal will also allow you to:
- Easily upload documents of all sizes
- Designate files as read-only or read-write — having the option to disable others from overwriting changes, for added security
- Search, sort and display documents based on a variety of characteristics

A portal will not only safely transmit your information but it will also help us foster better service, expanded communication and faster/easier access to the information you seek, at anytime.

System Requirements

- Portal is built on a Microsoft Silverlight 4 platform and a user may be prompted to install Silverlight from Microsoft's website. The installation typically takes less than one minute to complete and is completely safe.

- Portal will support all browsers on PC and Mac that are compatible with Microsoft Silverlight 4.
- A complete list of browsers and operating systems that support Silverlight 4 can be found at http://www.microsoft.com/getsilverlight/locale/en-us/html/installation-win-SL4.html
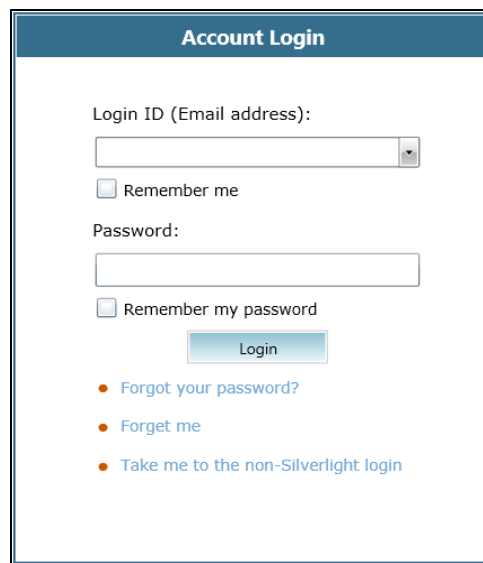
Icon Legend			
		Keys	Quick reference to the key aspects of a particular function
		Tip	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Warning	Important warnings about a function

Quick Start Guide

Portal Login

The interface is suitable for use on any computer and even your mobile/tablet devices. It provides a basic, web-based interface that allows you to use the core features efficiently, such as adding and downloading files.

Launch your internet browser and browse to https://portal.cchaxcess.com/portal

Portal Login

Login Tips

- Refer to the emails received from the Moriarty & Primack for login information.
- The Login ID (email address) is not case sensitive; **the temporary password provided via email is case sensitive**.
- You will be required to change your password upon logging in for the first time and answer at least one security question. Your security questions can help you access your portal if you ever forget your password.
- Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.
- Your password may be reset at anytime by clicking "Forgot your password?"
- If you cannot, or prefer not to, install Silverlight on your machine, click "Take me to the non-Silverlight login" to use our lightweight version of the Portal that does not require Silverlight. Advanced features are not available from the non-Silverlight version of Portal. Alternately, you can access the non-Silverlight login page directly at https://portal.cchaxcess.com/sui.
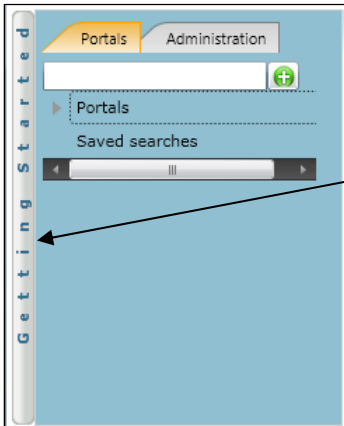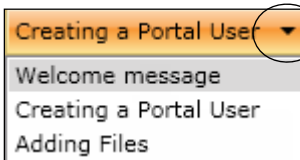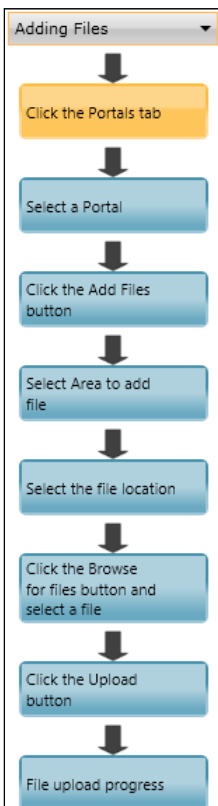
Getting Started

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 for Portal Admin users. **The Welcome Message and Adding Files will be visible to all Users.**


Adding Files

Getting Started menu Key Features

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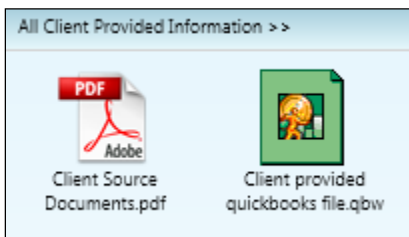
Download files from Portal
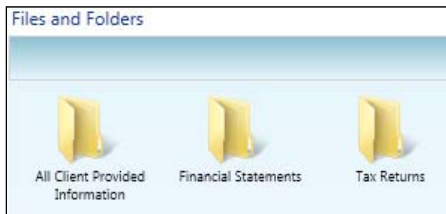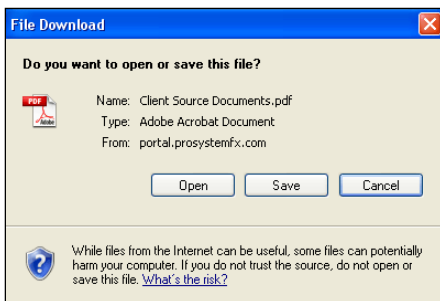

Files and Folders

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

Portal Documents

A simple way to view or save a file is to double-click on the file name. Double-clicking on a file will display the file download screen, displayed below.


File Download

Click open to view the file or save to download\save a copy to your computer or network. When a file is downloaded a copy is created and does not affect the file on your portal.

It is recommended to download/save a copy of your deliverable items from Portal as files will not remain there indefinitely. Moriarty & Primack will periodically remove files that are not permanent in nature. Those that are permanent in nature, such as tax returns or financial statements, will be removed after 36 months. If you want your files to be removed earlier than schedules, please contact Moriarty & Primack.

Add Files to Portal
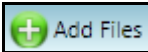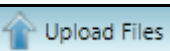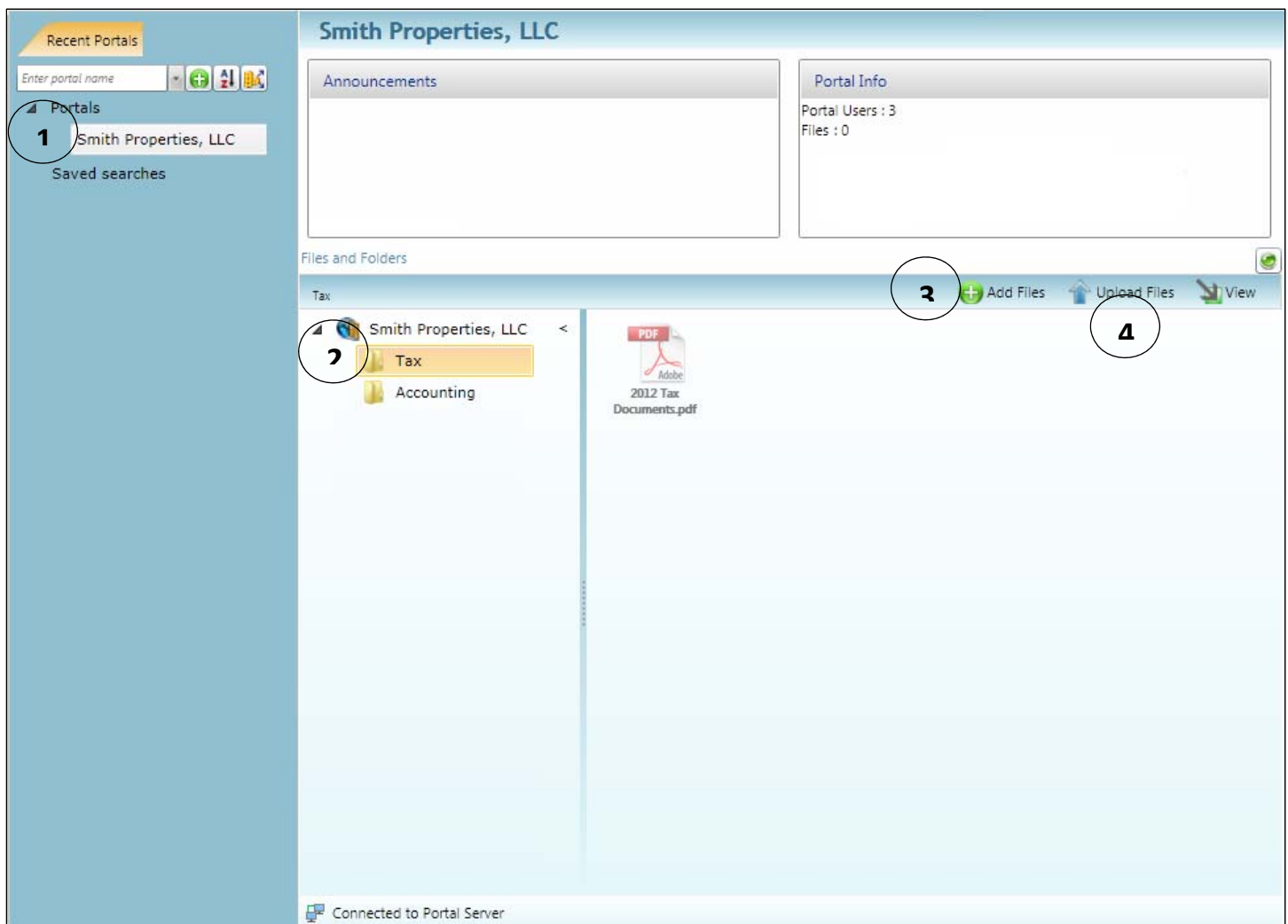

Add Files

Steps to Add Files to Portal

On the Portal Home page:

1. Select a portal (only for those users that have access to multiple portals)

2. Select the file location (folder)

3. Click **Add Files** to select file(s) via Windows Explorer <u>or</u> Drag and Drop files from your computer to the Files and Folders section

4. Click **Upload Files** to upload the file(s) to Portal

Advanced Features

- This section is intended to provide further assistance on the more complex portal features available to the Portal Admin user. The advanced features are optional and are not required for each portal.

Portal User Roles

Portal Admin

- The Portal Admin is the primary user who has access to the portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access by other Portal Users. The Portal Admin user will be the only user that exists initially.

Portal User

- A Portal User is created and granted access by the Portal Admin. Portal Users should only be created when Portal access is required by more than one person.

About User Roles

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

Example of Advanced Portal Use

- You may find situations in which it is practical to grant portal access to a 3rd party. For example; a banker that you and the firm collaborate with on a regular basis. Before having access to Portal; options to exchange information included email, fax, CD-ROM or hard copy paper, and in many cases you had to request the document from the Moriarty & Primack before you could provide it to the bank. As the Portal Admin, you may create a Portal User allowing your banker access to requested documents and the ability to add files at the request of you and the firm; considerably reducing the time and resources spent to exchange information. The security level of Portal far exceeds email, which is most often the primary medium of exchanging electronic files.

- If Moriarty & Primack has created more than one portal for you, you will be able to control which portal(s) your banker or other third party may view.

- Moriarty & Primack's portal solution, may or may not, provide you with the ability to secure folders. If available, this feature allows the Portal Admin to control a Portal User's access to one or more folders within a portal.

Managing Portal

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

💡 There are 3 steps to create Portal Users.

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

About File Management Roles

💡 There are 5 File Management Roles that can be assigned.

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

💡 **Recommendations**

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

📝 **Administration tab defined**

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

Create Portal Users

	Last Name	First Name	Email	Default Security User Role
☑	Doe	John	johndoe@email.com	Administrator
☐	Test Portal A	Test Portal A	TestPortalA@gmail.com	Limited User

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

Search portals: [Enter portal name] [View]

[Create] [Edit selected] [Delete selected]

Manage Portal Users

📝 From the Administration tab; click "**Manage Portal Users**", then click "**Create**".

Create Portal User

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

Create Portal User

Assign a user to a Portal

1. All portals will be displayed, check the Grant Access box to allow access to a Portal.
2. Assign a File Management Role for Portal Users to the selected Portal.
3. Select **Save** to create the Portal User. Emails containing login information will be sent to the login ID (email address) of the Portal User.

Edit Portal Users

Access to Portal may be modified or terminated at any time. It is important to terminate access when no longer needed by the Portal User. If you need assistance please contact Moriarty & Primack.
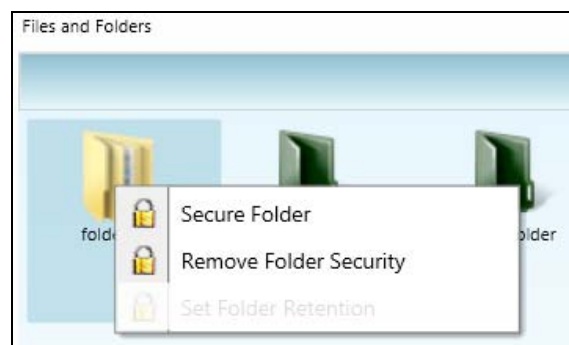

Edit Portal User

Select Manage Portal Users to edit or delete a Portal User. If access to the Portal is to be permanently terminated simply click "Delete selected" to remove all Portal access.

Folder Security

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

Folder Menu

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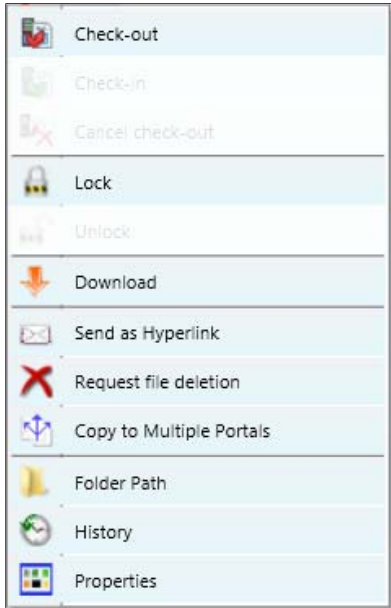
The Local File Menu

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

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

Local File Menu Key Features

Right-Click Menu

Check-out	Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.
Check-in	Add the previously checked-out file back to Portal to reflect any changes.
Cancel Check-out	Check-in a previously checked-out file as if the Check-out never occurred.
Lock\Unlock	Prevent file from being checked-out or deleted.
Download	View or save file (same as double-click on file name).
Send as Hyperlink	Send encrypted link via email. The recipient must be able to log-in to Portal in order to view the file.
Request file deletion	Requests file deletion by the firm.
Copy to Multiple Portals	Copies a file to other portals that the Portal User has access to.
Folder Path	Move file to a new folder.
History	View each action performed to the file and the user who performed the action.
Properties	Rename or change the folder location for a file.

Quick Reference Guide

Portal Login

- Launch your internet browser and browse to https://portal.cchaxcess.com/portal
- Enter your Login ID and your temporary password. These can be found in the email you received from Moriarty & Primack .
- You will be required to change your password upon logging in for the first time and answer at least one security question.

Add Files to Portal

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

Download Files from Portal

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