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ProSystem *fx*® Portal

Release Bulletin

Release 2012-1.0

December 2012

Welcome to ProSystem *fx* Portal 2012-1.0

This bulletin provides important information about the 2012-1.0 release of ProSystem *fx* Portal. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 9. Additional information is available on CCH Support Online.

Integration Enhancements

Batch Client Linking

The updated Batch Client Linking utility allows you to more quickly link clients from ProSystem *fx* Tax, Global *fx* Tax, and ProSystem *fx* Engagement to portals. You can link exact matches with a single click. Once clients are linked, you can save returns from Tax and work papers from Engagement to Portal without selecting the client again during publishing.

Print Practice (SaaS) Invoices to Portal

You can now send invoices from ProSystem *fx* Practice (SaaS) to your client. Firms using the version of ProSystem *fx* Document that integrates with Portal must have a firm administrator set up the Practice interface prior to use. To do this, in Dashboard, click **Applications**, and then select **Document** > **Settings & Defaults** > **Practice Mapping**. The options that must be set up include default metadata, file naming conventions, and default portal publishing options.

Search for Portals and Users by Email Address

Firm users and portal users can now search for portals or other users by email address. On the Recent Portals tab, a new drop-down field allows you to filter by portal name or email address. When *Email Address* is selected, users can enter an email address, and then click the search button to display a list of all the portals that the user can access. Users with administrative rights can also search for portals by email address on the Manage Portal, Manage Firm Users, and Manage Portal Users windows.

Usability and Ease of Use Enhancements

Drag Files into Portal

You can now add files to Portal by dragging them to the Files and Folders section of the Portal home page. You can also drag files to move them within a portal. The ability to drag files is only supported in the Files and Folders section.

Tree View

The Files and Folders section now includes a tree view so you can view all of the folders for a selected portal. This view is similar to the default view in Windows Explorer. The tree view also supports the ability to add or move files by dragging the files to a folder.

New Add Files Process

To simplify the process for adding files, the Add Files screen has been removed from the Silverlight Portal. Firm users and their clients can now add files in one of two ways:

- **Dragging files** – Users can drag one or more files from the workstation to the Files and Folders section for a client.
- **Add Files Button** – The Add Files button no longer opens the Add Files screen. Instead, it opens a window in which you can select files for upload to Portal. Clicking the **Upload** button begins the upload process and sends appropriate email notifications. Files selected for upload display at a 50% transparency in Portal as a reminder to click the Upload button.

New File Indicator

When you add a file to Portal, a NEW indicator displays next to the file (in Icon view), and the filename displays in bold text (icon view and detail view). Files uploaded by the firm display as NEW until a client user downloads or checks out the file. Files uploaded by a client user display as NEW until any firm user downloads or checks out the file. If the firm uses the version of Portal that integrates with Document, files uploaded by client users display as NEW until the firm user approves the files in Document.

Toggle View Options

The toggle view now provides an icon view and details view that can be changed without the animation that was used previously.

Access Groups Redesigned

The access group creation and editing processes have been simplified. You can add portals and users to an access group when you create the group. When editing an access group, you can add portals and firm users from the same screen using a new tabbed interface.

Portal Reports (for the version of Portal that integrates with Document)

The following reports are now available in Document. You can print or export reports to PDF, CSV, and XLS formats. Report grids can be grouped or sorted, and a *Find* option allows you to locate specific data in longer reports.

- **Portal Storage** – Displays a list of clients with portals, as well as the amount of storage being used for each portal.
- **Portal Approver List** – Displays a list of clients with portals and the firm users selected as approvers for each portal.
- **File List** – Displays a list of files published to a selected client’s portal, along with the following information for each file: the storage location, upload date, and the name of the user who uploaded the file.
- **Portal Administrators** – Displays a list of clients with portals, along with the email address for each portal's administrator.
- **Portal Usage** – Displays a list of client users for a selected portal, along with the last upload date, last download date, and the last log-in date for each user. This report allows you to identify which clients are using their portals.
- **Firm User Access** – Displays a list of firm users and the portals each user has access to.
- **Files Not Accessed** – Displays a list of files that have not yet been accessed by the selected client.
- **Portal List** – Displays a list of all client portals. The report includes the following information for each portal: client name, portal administrator’s email address, status, date created, and the firm user who created the portal.
- **Portal Users** – Displays a list of clients with portals (or a single selected client), and the portal users for each portals, including the user's name, email address, file management role, and access expiration date.
- **File Count** – Displays a list of client portals and a count of the files in the collaboration (shared) area and the client area, if licensed. The report also includes the email addresses for the portal administrators.
- **Portal Users Never Logged In** – Displays a list of client portals for which portal users have not yet logged in. This report includes the names of the portal users, the date access was granted, and the portals the user has access to.
- **Uploaded and Checked-in Files** – Displays a list of files that have been uploaded or checked in by firm users or portal users. You can run the report for all clients or for a single selected client. You can also specify a date range for the report. The report includes the following information: client name, client ID, filename, uploaded/checked-in status, upload or checked-in date, and the user who uploaded or checked in the file.

Portal Reports (Standalone Portal, without Document)

The Portal Access report is now available from the Manage Portal screen. This report displays an alphabetical list of clients for which portals have been created, and includes a list of all firm users and all portal users (and their email addresses) who have access to the portal. Due to its size, the Portal Access report can only be downloaded. The report is saved in HTML format and is saved to a ZIP file. Multiple reports may be required for very large accounts, and they will all be included in the same ZIP file for easier downloading.

ADDITIONAL INFORMATION

You can learn more about ProSystem *fx* Portal by visiting our Web site here, or contact your local sales representative.
For support information, please visit Customer Support Online and stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.